

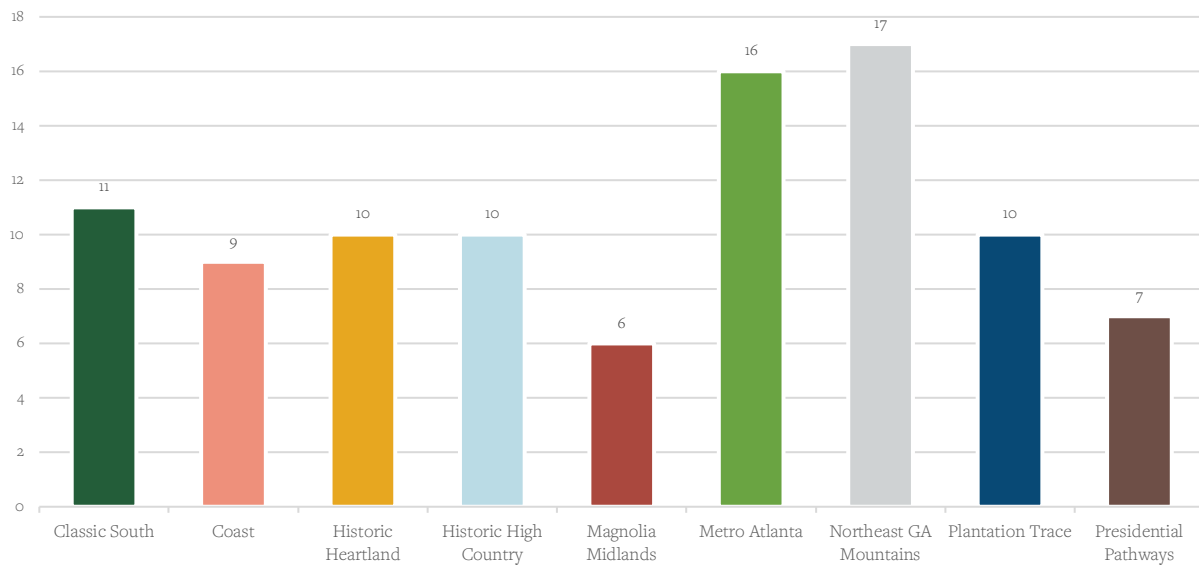


EXPLORE GEORGIA COVID-19 RECOVERY: PARTNER READINESS SURVEY ASSESSMENT BY REGION: WAVE I

JUNE 11, 2020

EXECUTIVE SUMMARY

In the first wave of our *Explore Georgia COVID-19 Recovery: Partner Readiness Survey*, we received 96 complete responses from all nine tourism regions.



For the State of Georgia as a whole, this is where the communities stood as of May 29, 2020:

- The tourism assets most ready to welcome visitors right now:
 - Campgrounds and RV facilities
 - Hotels, motels and resorts
 - Retail stores
- The tourism assets least ready to welcome visitors right now are:
 - Live performance venues
 - Festivals and special events
 - Bars, nightclubs and other nightlife
- Resident sentiment:
 - The majority of residents are more receptive to in-state visitors compared to out-of-state visitors
 - Residents would prefer not to see their communities advertised as a place for tourists to visit

EXPLORE GEORGIA

The following are detailed summaries for each of the nine Explore Georgia regions – for those who reported on behalf of their communities – describing their tourism-related businesses’ overall readiness to receive visitors.

- Atlanta Metro: pages 3-5
- Classic South: pages 6-8
- The Coast: pages 9-11
- Historic Heartland: pages 12-14
- Historic High Country: pages 15-17
- Magnolia Midlands: pages 18-20
- Northeast Georgia Mountains: pages 21-23
- Plantation Trace: pages 24-26
- Presidential Pathways: pages 27-29

EXPLORE GEORGIA

ATLANTA METRO

Overall Readiness

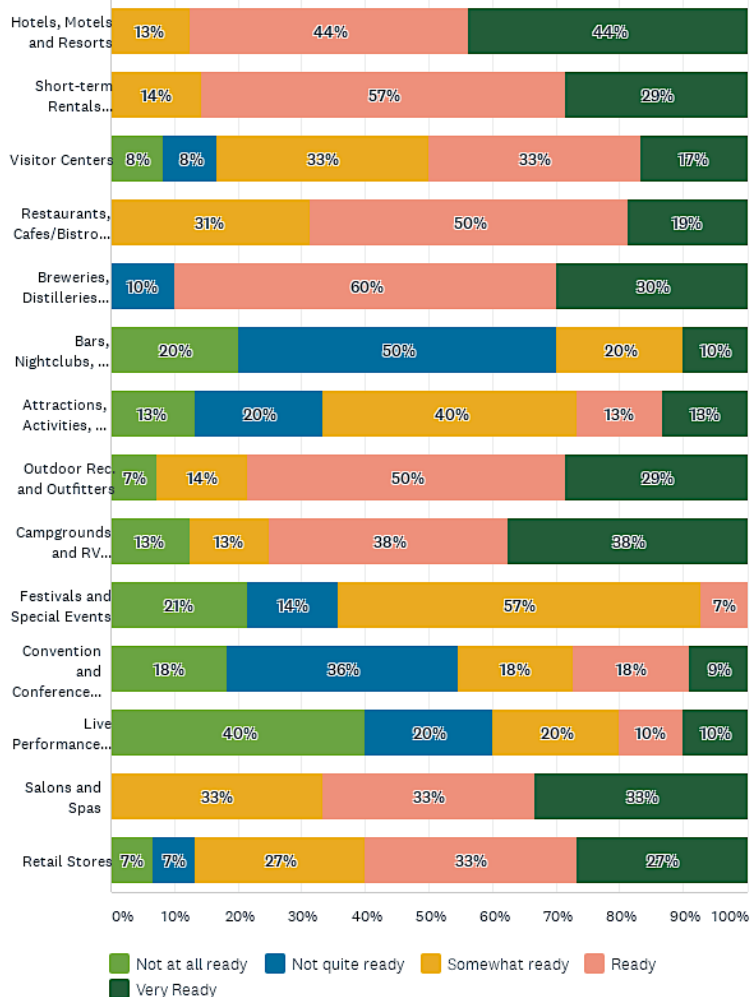
In the Atlanta Metro region, the tourism assets most ready for visitors right now include:

- Accommodations (hotels, motels, resorts, and short term rentals)
- Breweries, Distilleries and Wineries
- Outdoor Recreation Opportunities
- Campgrounds and RV Facilities

Additional time to prepare is needed for these tourism assets:

- Bars, Nightclubs and other Nightlife
- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.

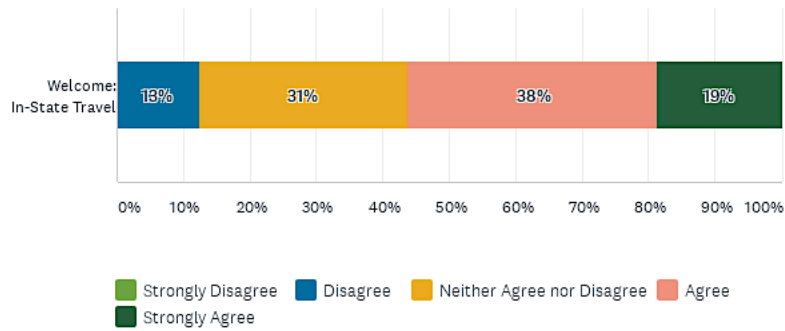


ATLANTA METRO, CONTINUED

Readiness to Welcome In-State Travelers

In the Atlanta Metro, the majority of respondents said residents were willing to welcome in-state travelers (57% either Agreed or Strongly Agreed).

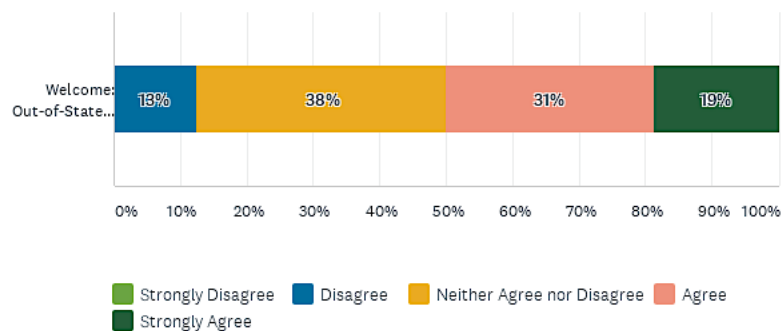
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents said residents were slightly less willing to welcome travelers from outside Georgia, with only 50% either Agreeing or Strongly Agreeing.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



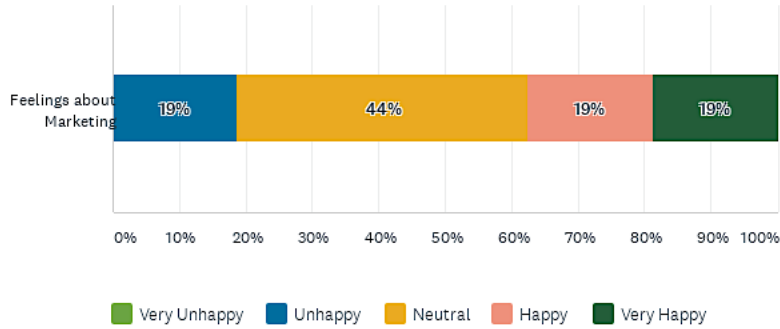


ATLANTA METRO, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

There was greater uncertainty surrounding resident sentiment about seeing their community advertised to tourists, with 63% of respondents reporting that their residents would feel Unhappy or Neutral.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

CLASSIC SOUTH

Overall Readiness

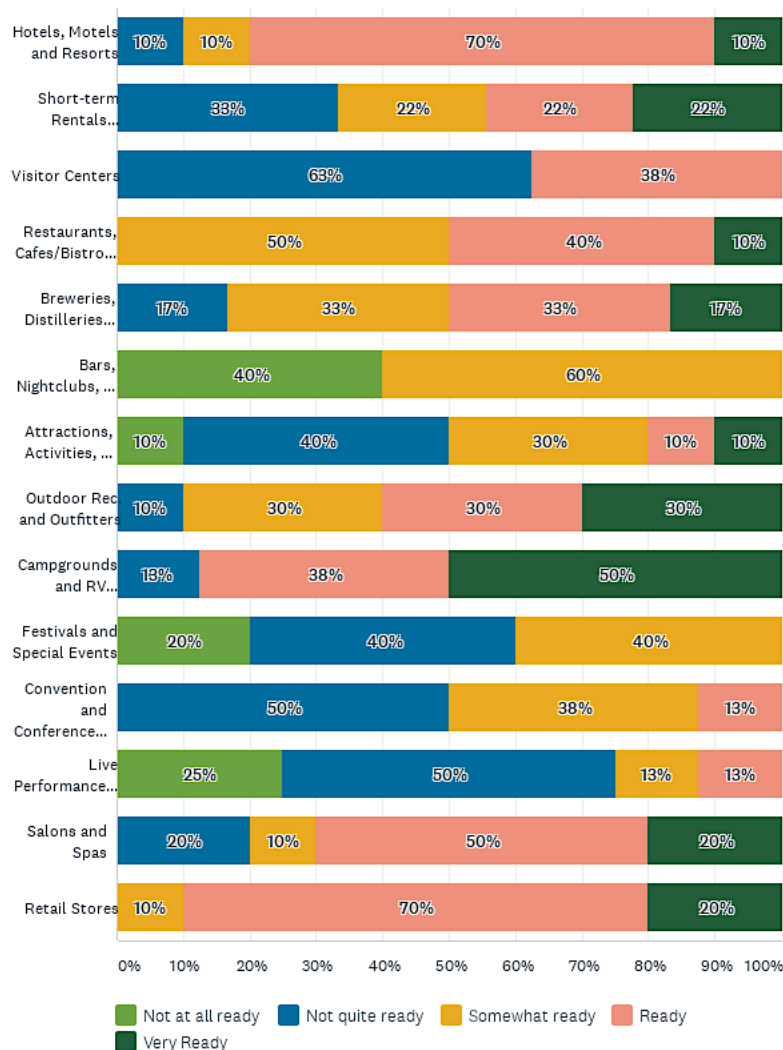
In the Classic South region, the tourism assets most ready for visitors right now include:

- Retail Stores
- Campgrounds and RV Facilities
- Hotels, Motels, and Resorts

Additional time to prepare is needed for these tourism assets:

- Bars, Nightclubs and other Nightlife
- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.



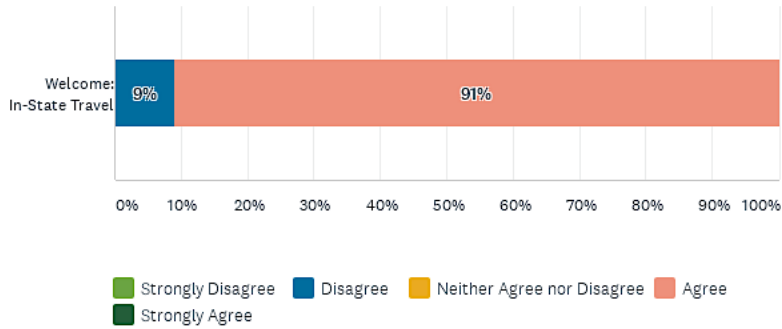


CLASSIC SOUTH, CONTINUED

Readiness to Welcome In-State Travelers

In the Classic South, respondents said residents were overwhelmingly willing to welcome in-state travelers – 91% Agreed.

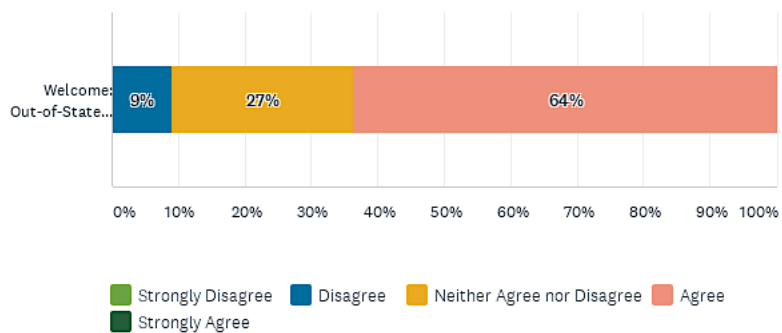
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

The majority (64%) of respondents also Agreed that their residents were willing to welcome travelers from outside Georgia.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



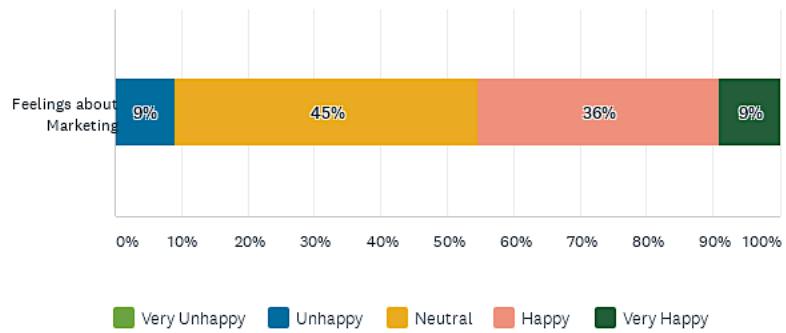


CLASSIC SOUTH, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

There was more uncertainty surrounding resident sentiment about seeing their community advertised to tourists, with 54% of respondents reporting that their residents would feel Unhappy or Neutral.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

THE COAST

Overall Readiness

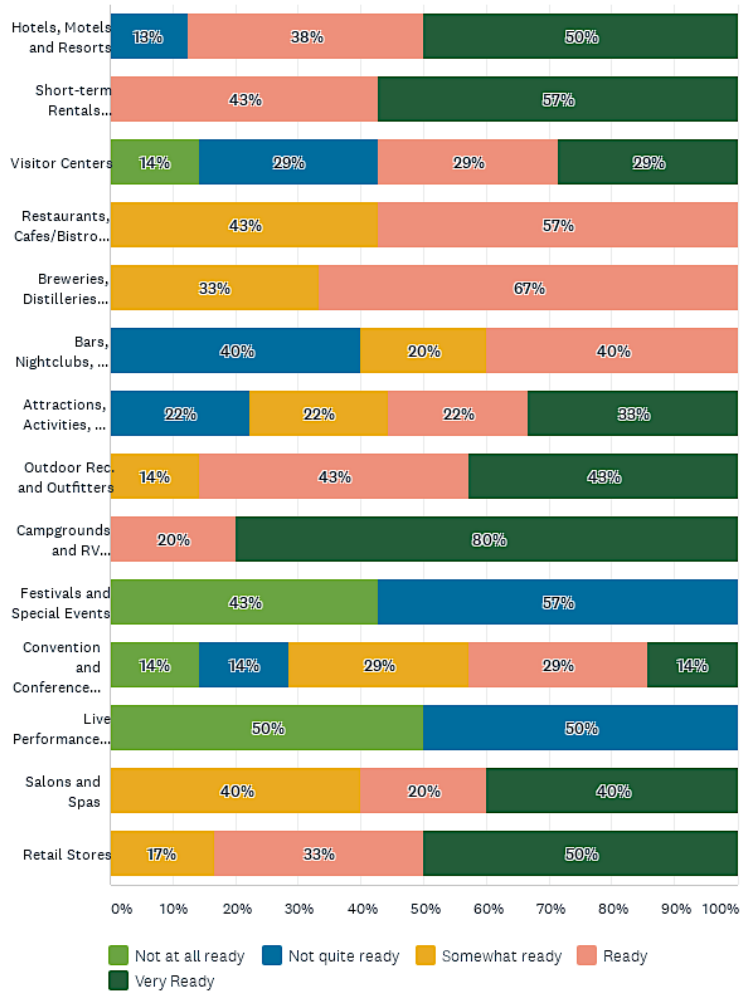
In the Coast region, the tourism assets most ready for visitors right now include:

- Campgrounds and RV Facilities
- Outdoor Recreation Opportunities
- Accommodations (hotels, motels, resorts, and short term rentals)
- Retail Stores

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.



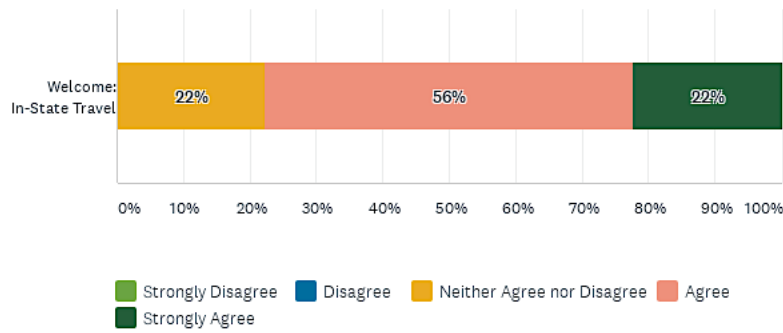


THE COAST, CONTINUED

Readiness to Welcome In-State Travelers

In the Coast, no respondents Disagreed about their residents being willing to welcome in-state travelers, and 78% either Agreed or Strongly Agreed.

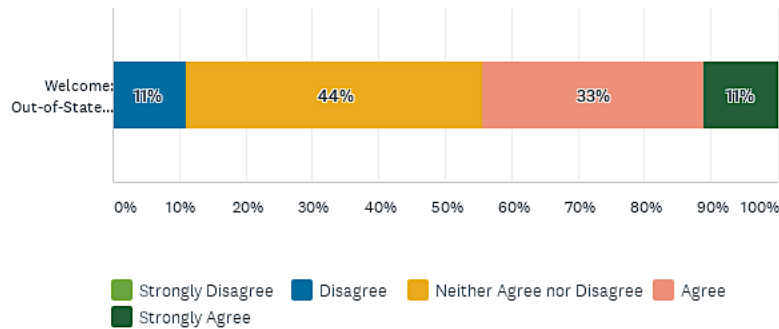
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

In terms of resident willingness to welcome travelers from outside Georgia, only 44% either Agreed or Strongly Agreed.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



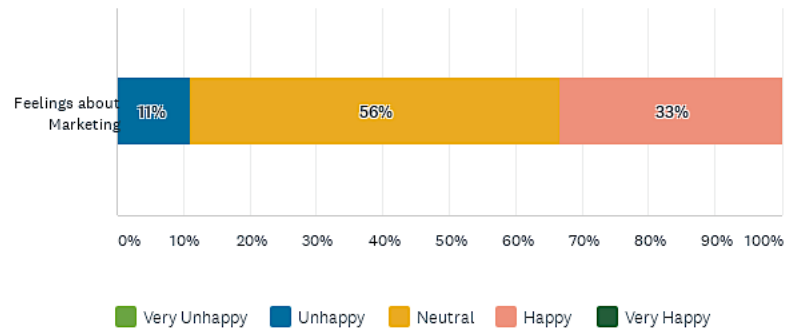
EXPLORE GEORGIA

THE COAST, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

There was greater uncertainty surrounding resident sentiment about seeing their community advertised to tourists, with two-thirds of respondents reporting that their residents would feel Unhappy or Neutral.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

HISTORIC HEARTLAND

Overall Readiness

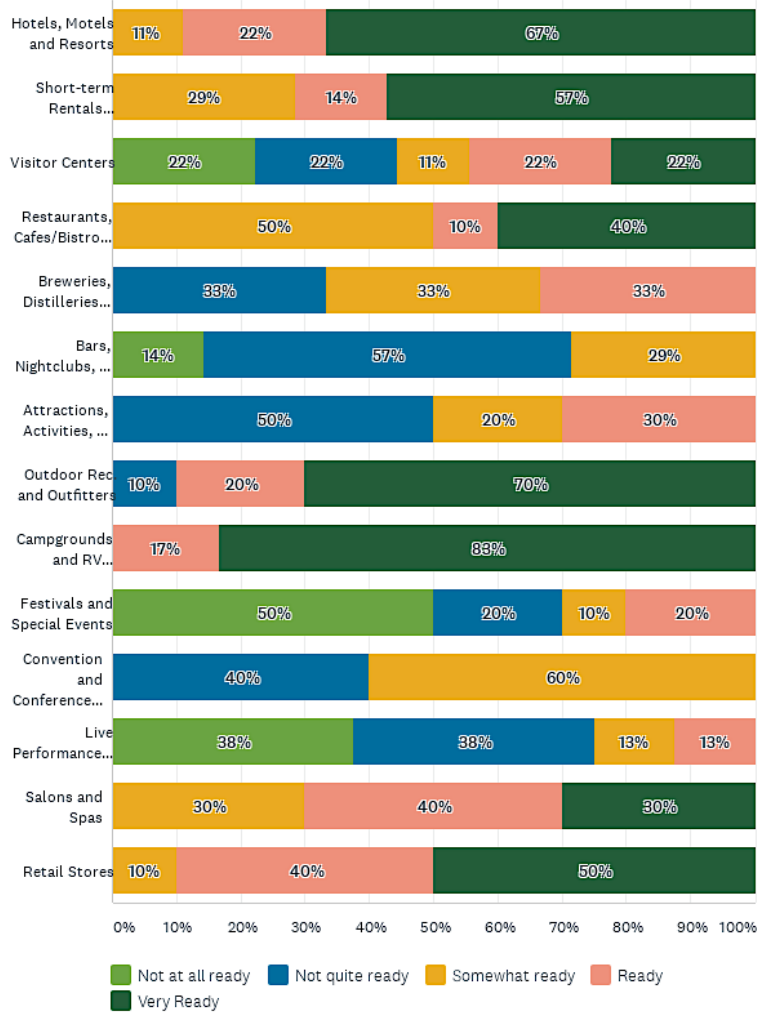
In the Historic Heartland region, the tourism assets most ready for visitors right now include:

- Outdoor Recreation Opportunities
- Campgrounds and RV Facilities
- Retail Stores
- Accommodations (hotels, motels, resorts, and short term rentals)

Additional time to prepare is needed for these tourism assets:

- Bars, Nightclubs and other Nightlife
- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.



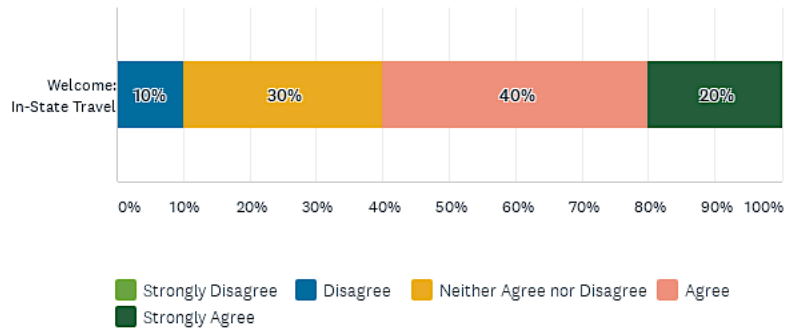


HISTORIC HEARTLAND, CONTINUED

Readiness to Welcome In-State Travelers

In the Historic Heartland, the majority (60%) of respondents either Agreed or Strongly Agreed about their residents being willing to welcome in-state travelers.

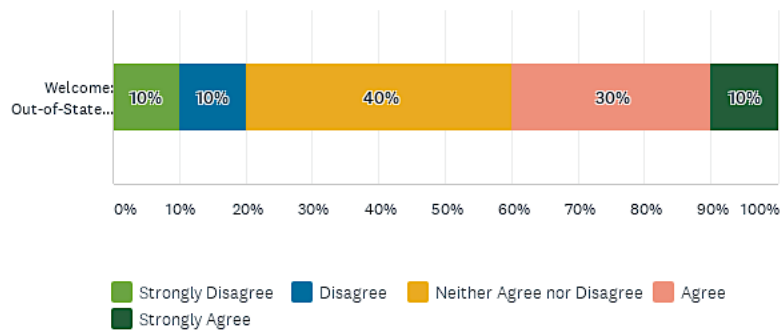
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

In terms of resident willingness to welcome travelers from outside Georgia, 10% Strongly Disagreed and only 40% either Agreed or Strongly Agreed.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



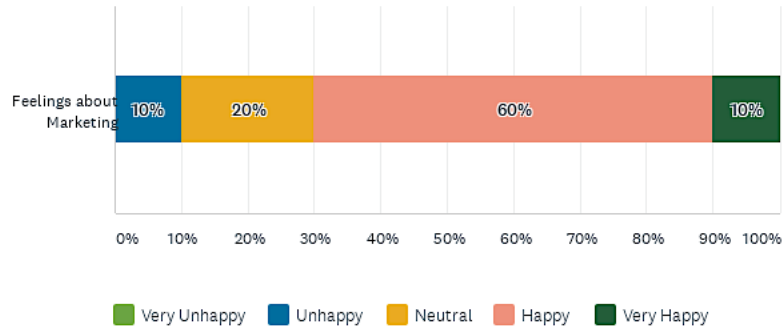
EXPLORE GEORGIA

HISTORIC HEARTLAND, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

The Historic Heartland region was quite welcoming in terms of seeing their community advertised to tourists, with 70% of respondents reporting that their residents would feel Happy or Very Happy.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?





HISTORIC HIGH COUNTRY

Overall Readiness

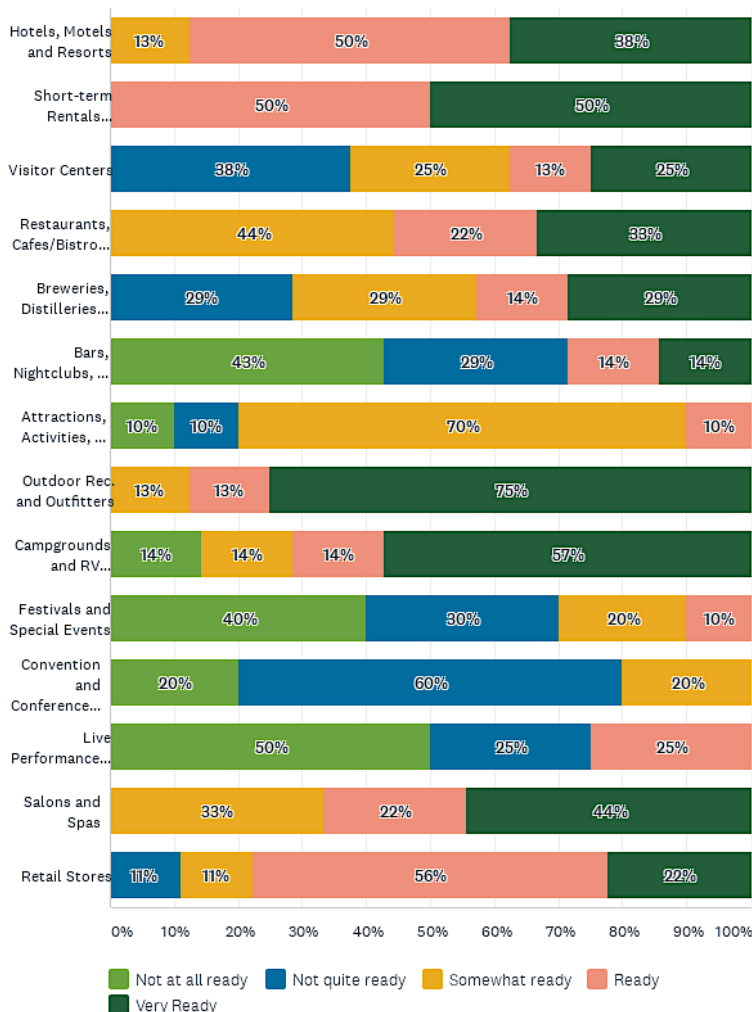
In the Historic High Country region, the tourism assets most ready for visitors right now include:

- Accommodations (hotels, motels, resorts, and short term rentals)
- Outdoor Recreation Opportunities
- Campgrounds and RV Facilities
- Retail Stores

Additional time to prepare is needed for these tourism assets:

- Convention and Conference Facilities
- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.

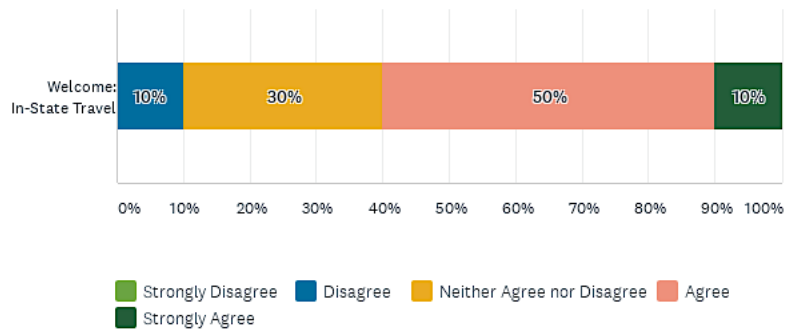


HISTORIC HIGH COUNTRY, CONTINUED

Readiness to Welcome In-State Travelers

In the Historic High Country, the majority (60%) of respondents either Agreed or Strongly Agreed about their residents being willing to welcome in-state travelers.

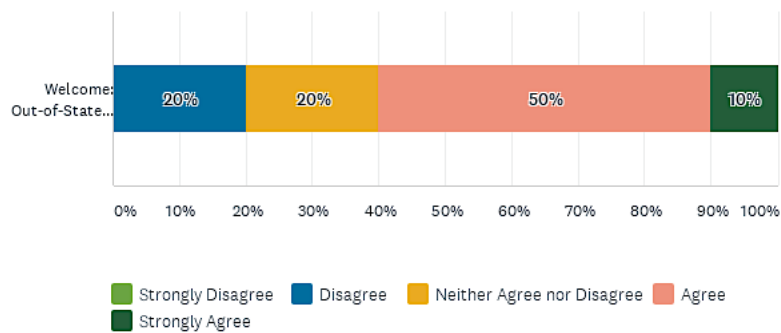
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

The majority (60%) of respondents also Agreed or Strongly Agreed about their residents’ willingness to welcome travelers from outside Georgia.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



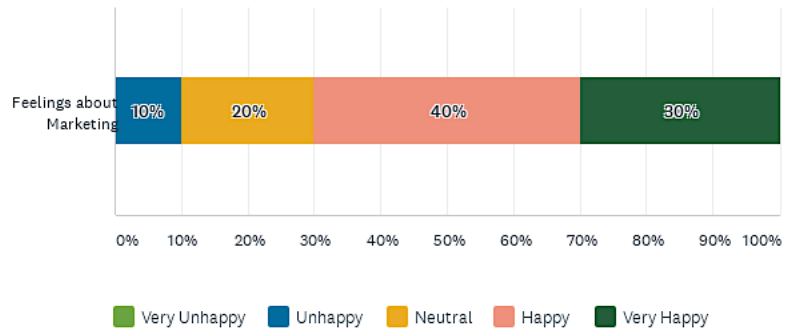
EXPLORE GEORGIA

HISTORIC HIGH COUNTRY, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

Much like the Historic Heartland region, Historic High Country was quite welcoming in terms of seeing their community advertised to tourists, with 70% of respondents reporting that their residents would feel Happy or Very Happy.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

MAGNOLIA MIDLANDS

Overall Readiness

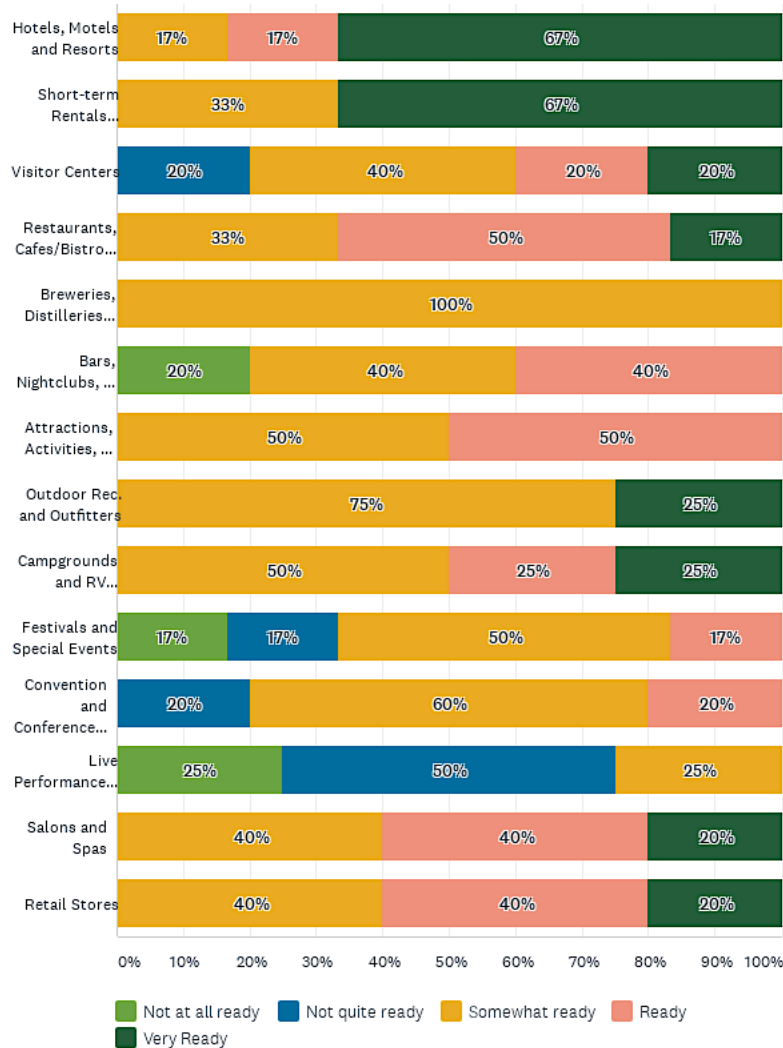
In the Magnolia Midlands region, the tourism assets most ready for visitors right now include:

- Accommodations (hotels, motels, resorts, and short term rentals)
- Restaurants, Cafes/Bistros, and other Dining Establishments

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.

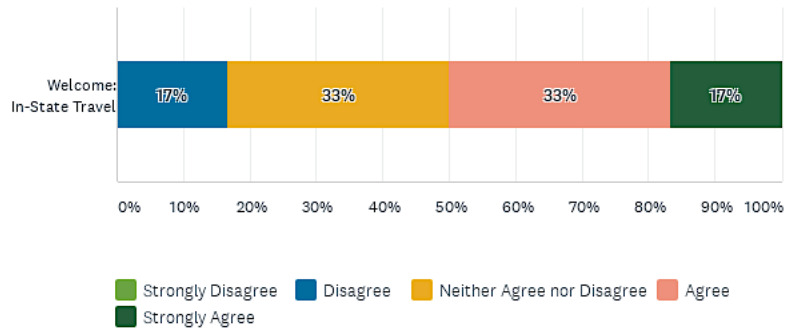


MAGNOLIA MIDLANDS, CONTINUED

Readiness to Welcome In-State Travelers

In the Magnolia Midlands, respondents were split about their residents being willing to welcome in-state travelers, with 50% either Agreeing or Strongly Agreeing.

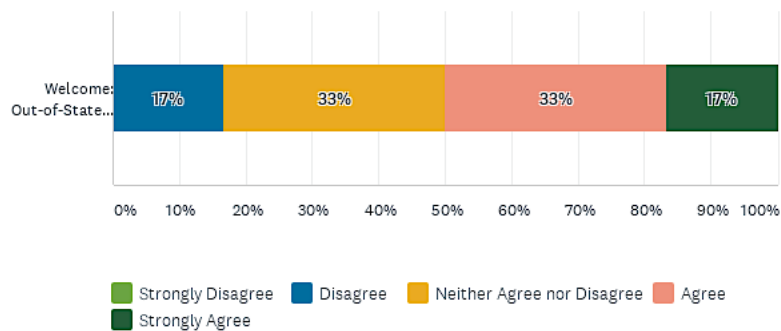
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents were split along the same lines in terms of their residents’ willingness to welcome travelers from outside Georgia.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



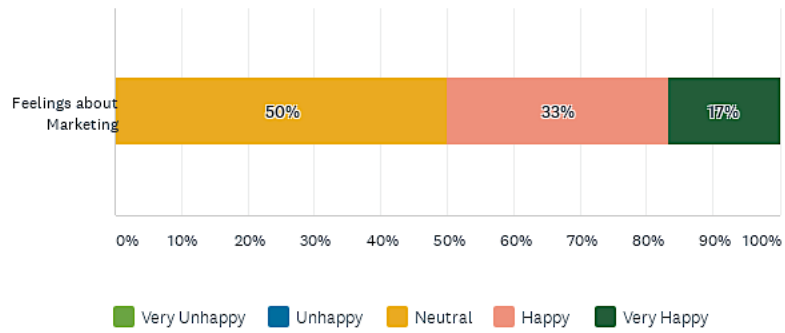


MAGNOLIA MIDLANDS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

Again, respondents were similarly divided when it came to resident sentiment about seeing their community advertised to tourists, with 50% of respondents reporting that their residents would feel Happy or Very Happy.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

NORTHEAST GEORGIA MOUNTAINS

Overall Readiness

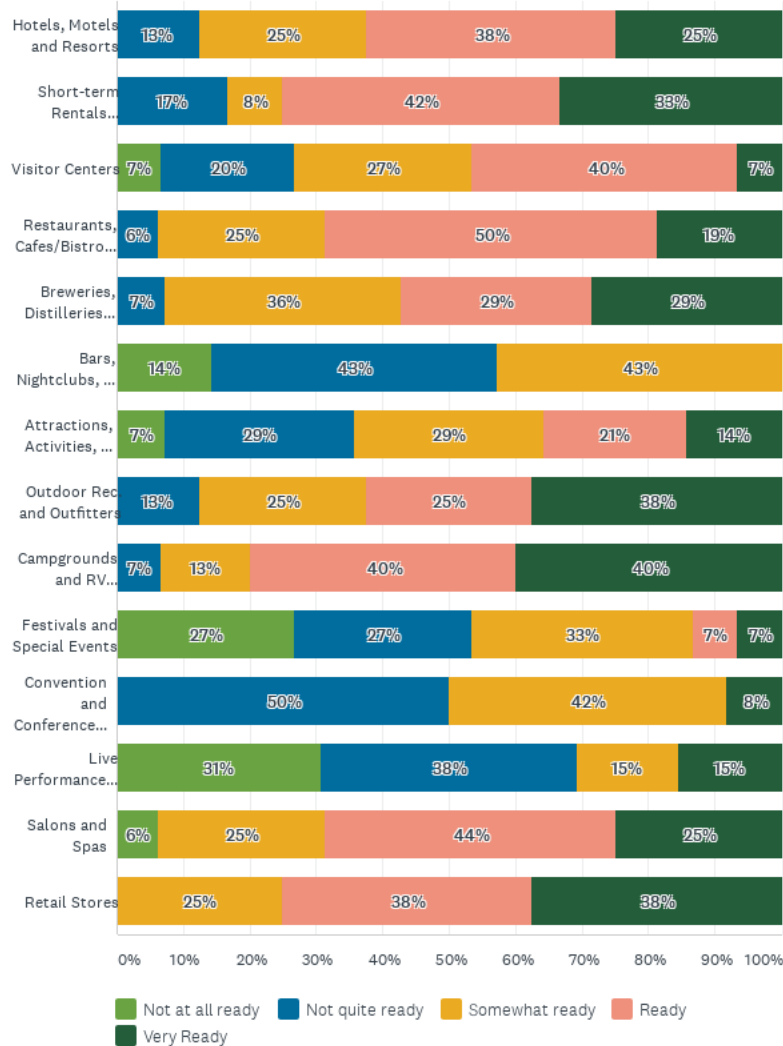
In the Northeast Georgia Mountains region, the tourism assets most ready for visitors right now include:

- Outdoor Recreation Opportunities
- Campgrounds and RV Facilities
- Accommodations (hotels, motels, resorts, and short term rentals)
- Retail Stores

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.



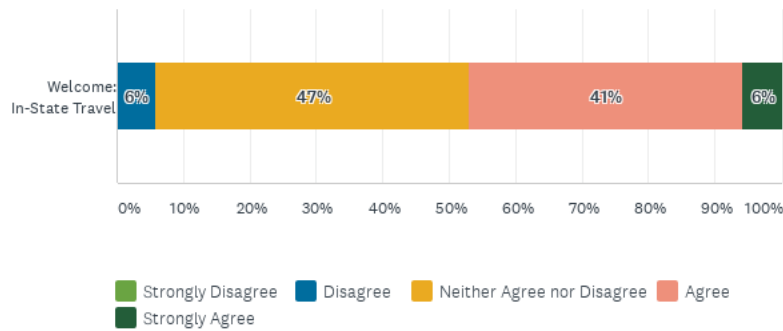


NORTHEAST GEORGIA MOUNTAINS, CONTINUED

Readiness to Welcome In-State Travelers

In Northeast Georgia Mountains, respondents were split about their residents being willing to welcome in-state travelers, with either 47% either Agreeing or Strongly Agreeing.

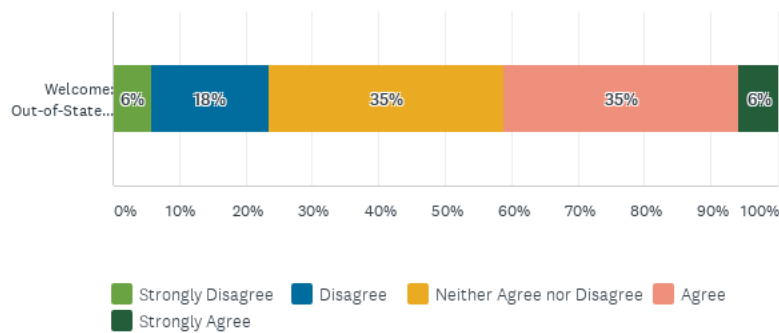
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

In terms of residents’ willingness to welcome travelers from outside Georgia, 6% Strongly Disagreed, only 41% either Agreed or Strongly Agreed.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”

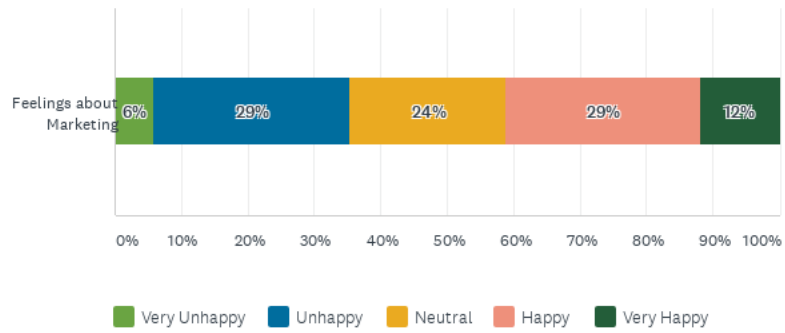


NORTHEAST GEORGIA MOUNTAINS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

There was greater uncertainty when it came to resident sentiment about seeing their community advertised to tourists, with 59% of respondents reporting their residents would feel Very Unhappy, Unhappy, or Neutral.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

PLANTATION TRACE

Overall Readiness

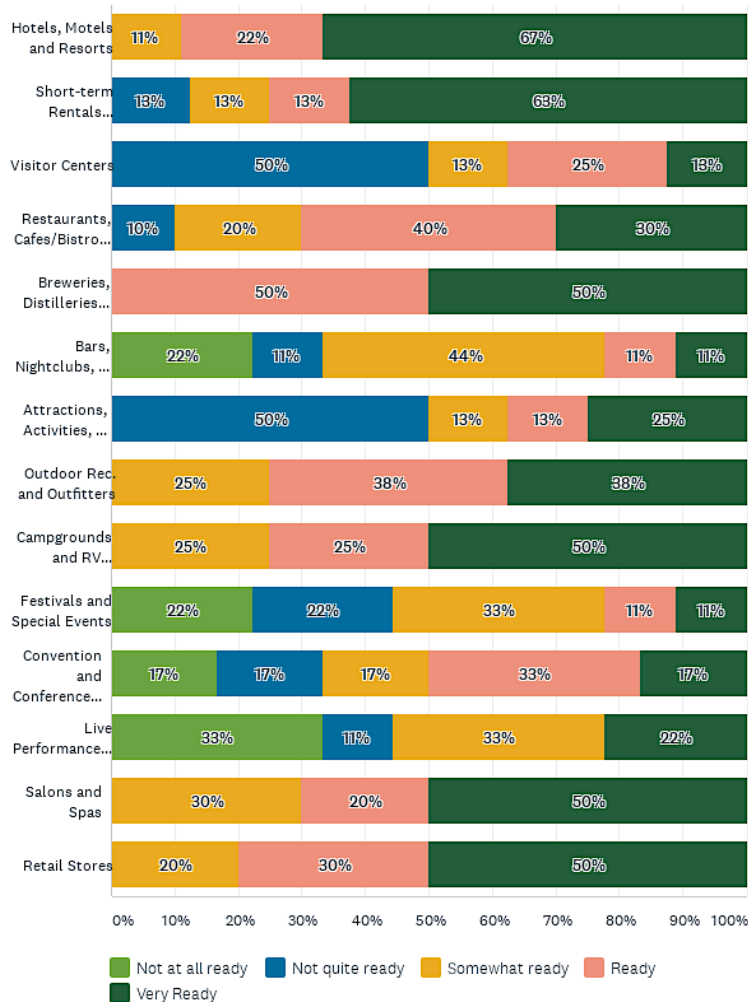
In the Plantation Trace region, the tourism assets most ready for visitors right now include:

- Breweries, Distilleries, and Wineries
- Accommodations (hotels, motels, resorts, and short term rentals)
- Retail Stores

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.

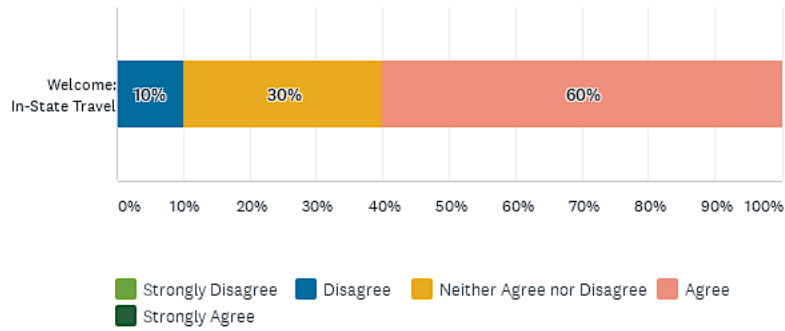


PLANTATION TRACE, CONTINUED

Readiness to Welcome In-State Travelers

In Plantation Trace, the majority (60%) of respondents Agreed about their residents being willing to welcome in-state travelers.

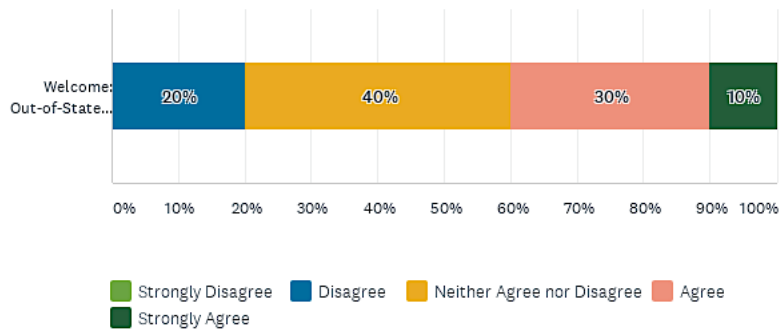
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

By contrast, only 40% either Agreed or Strongly Agreed about their residents’ willingness to welcome travelers from outside Georgia.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



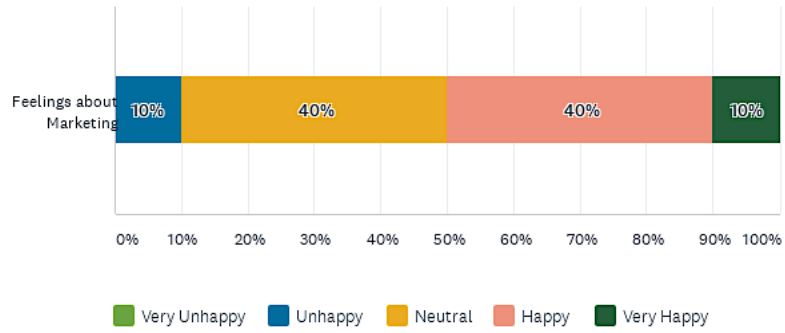
EXPLORE GEORGIA

PLANTATION TRACE, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

There was an even split when it came to resident sentiment about seeing their community advertised to tourists, with 50% of respondents reporting that their residents would feel Happy or Very Happy.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?



EXPLORE GEORGIA

PRESIDENTIAL PATHWAYS

Overall Readiness

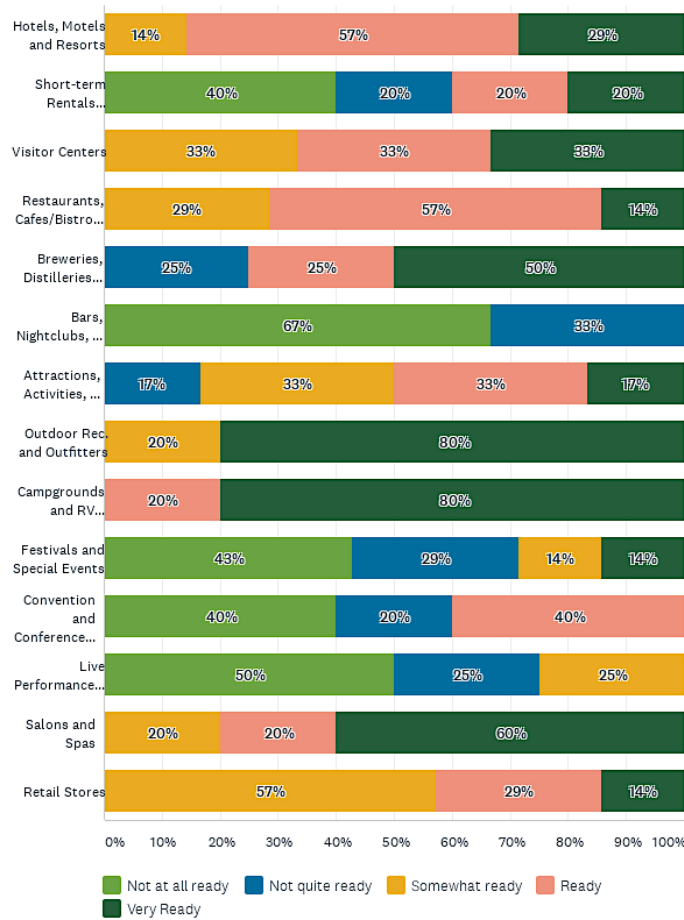
In the Presidential Pathways region, the tourism assets most ready for visitors right now include:

- Campgrounds and RV Facilities
- Outdoor Recreation Opportunities
- Hotels, Motels and Resorts
- Salons & Spas

Additional time to prepare is needed for these tourism assets:

- Bars, Nightclubs and other Nightlife
- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities

Q: As of today, to the best of your ability, please approximate your local tourism-related businesses' overall readiness to receive visitors.

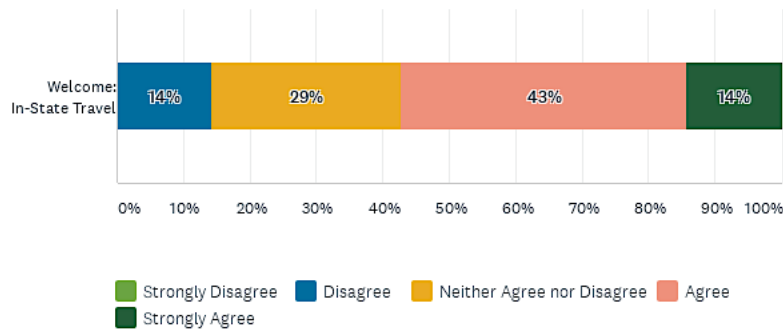


PRESIDENTIAL PATHWAYS, CONTINUED

Readiness to Welcome In-State Travelers

In Presidential Pathways, the majority (57%) of respondents either Agreed or Strongly Agreed about their residents being willing to welcome in-state travelers.

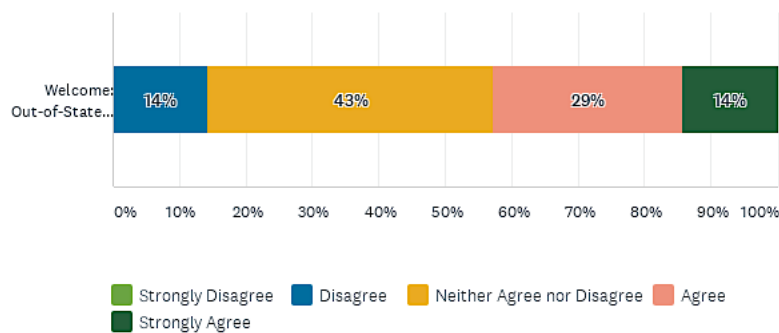
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

By contrast, only 43% either Agreed or Strongly Agreed about their residents’ willingness to welcome travelers from outside Georgia.

Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome out-of-state travelers to visit their community right now.”



EXPLORE GEORGIA

PRESIDENTIAL PATHWAYS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

No respondents reported their residents would feel Very Unhappy or Unhappy about seeing their community advertised to tourists, with the majority (57%) stating they would feel Neutral.

Q: As of today, how would your residents feel if they saw an advertisement promoting their community as a place for tourists to visit?

