

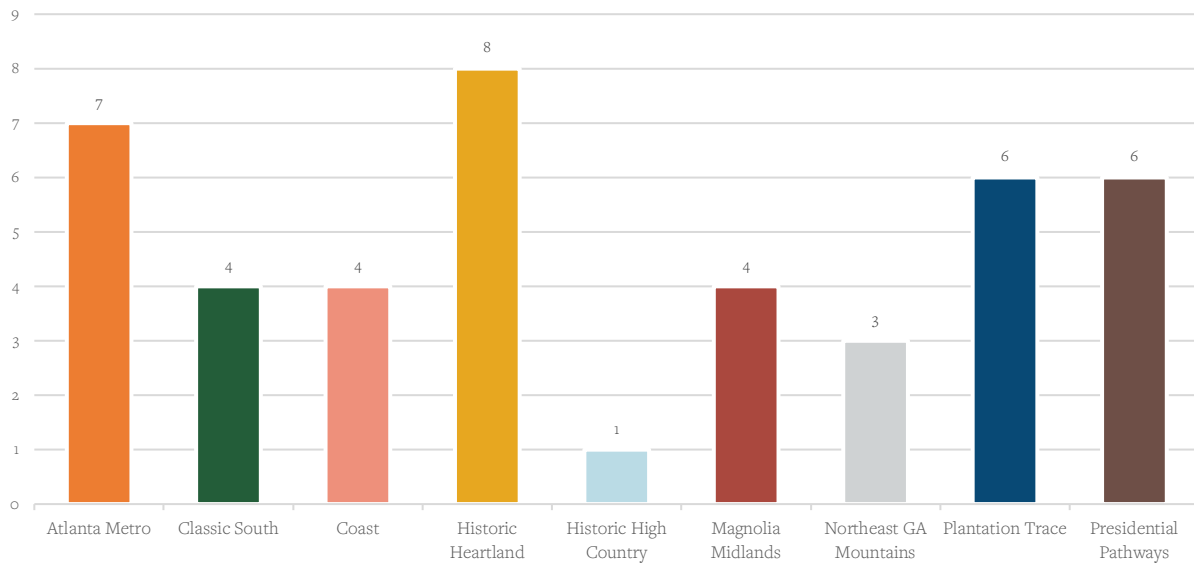


EXPLORE GEORGIA COVID-19 RECOVERY: PARTNER READINESS SURVEY ASSESSMENT BY REGION: WAVE II

JUNE 25, 2020

EXECUTIVE SUMMARY

In the second wave of our *Explore Georgia COVID-19 Recovery: Partner Readiness Survey*, we received 43 complete responses, with all nine tourism regions represented. Given the reduction in responses from Wave I to Wave II, the results of this round are not as robust. We hope increased participation in subsequent waves will bolster the reliability and comprehensiveness of future reports.



For the State of Georgia as a whole, this is where the communities stood as of June 15, 2020:

- The tourism assets most ready to welcome visitors right now:
 - Hotels, motels and resorts
 - Campgrounds and RV facilities
 - Salons and spas
- The tourism assets least ready to welcome visitors right now are:
 - Festivals and special events
 - Live performance venues
 - Convention and Conference Facilities

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- Resident sentiment:
 - While the majority of residents would be receptive to both in- and out-of-state visitors, they remain more hesitant about out-of-state visitors
 - Resident sentiment about seeing their communities advertised as a place for tourists to visit is reportedly improving, with 56% of respondents reporting their residents would be Happy or Very Happy. However, a significant portion – 42% – believed their residents would have a Neutral response.

REGIONAL SUMMARIES

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

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ATLANTA METRO

Overall Readiness

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

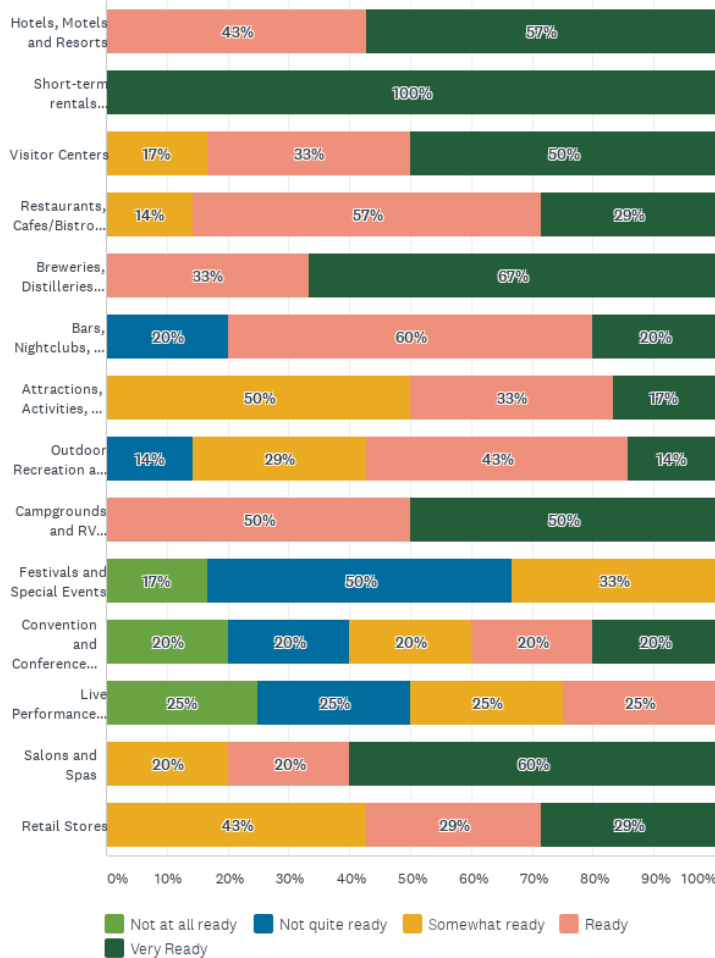
- Accommodations (hotels, motels, resorts, and short term rentals)
- Breweries, Distilleries, and Wineries
- Campgrounds and RV Facilities

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities
- Attractions, Activities, and Tours

Notably, overall readiness increased in most categories, but Outdoor Recreation opportunities were rated less ready overall this wave.

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



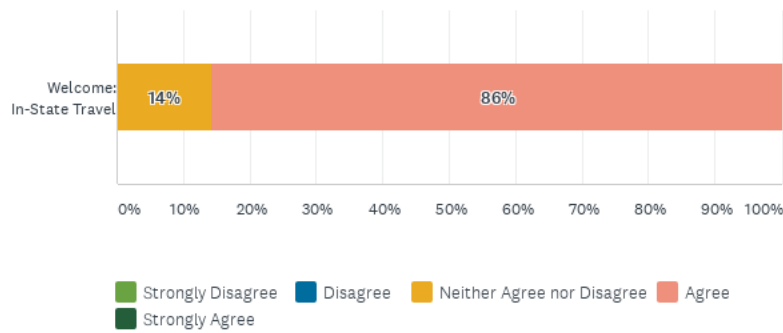


ATLANTA METRO, CONTINUED

Readiness to Welcome In-State Travelers

In the Atlanta Metro, a strong majority of respondents said residents were willing to welcome in-state travelers (86% Agreed). While there were no Strong Agreement responses this wave, there were also no Disagreement responses.

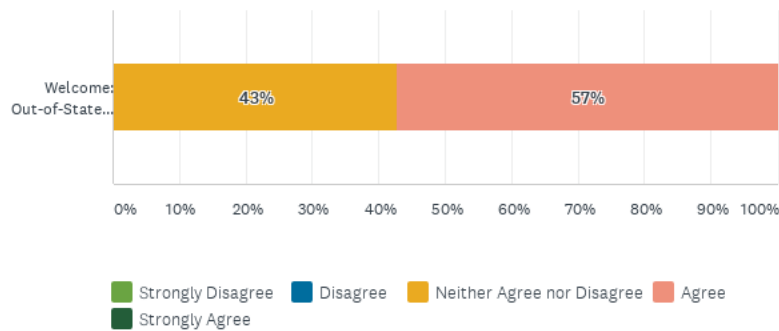
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents said residents were slightly less willing to welcome travelers from outside Georgia, with only 57% Agreeing. Similar to in-state travelers, there was neither Strong Agreement nor Disagreement this wave.

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.”



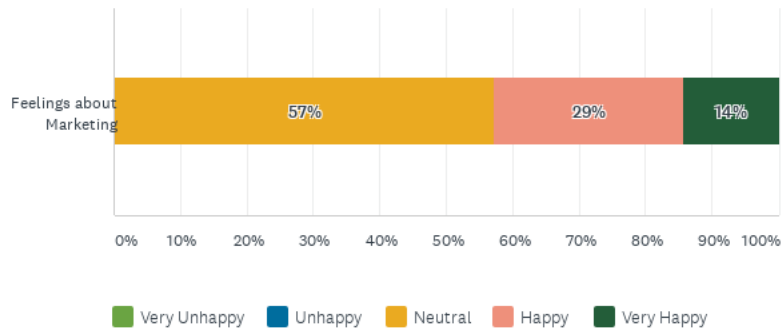


ATLANTA METRO, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

While improved from Wave I, uncertainty surrounding resident sentiment about seeing their community advertised to tourists remained, with 57% of respondents reporting that their residents 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?



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CLASSIC SOUTH

Overall Readiness

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

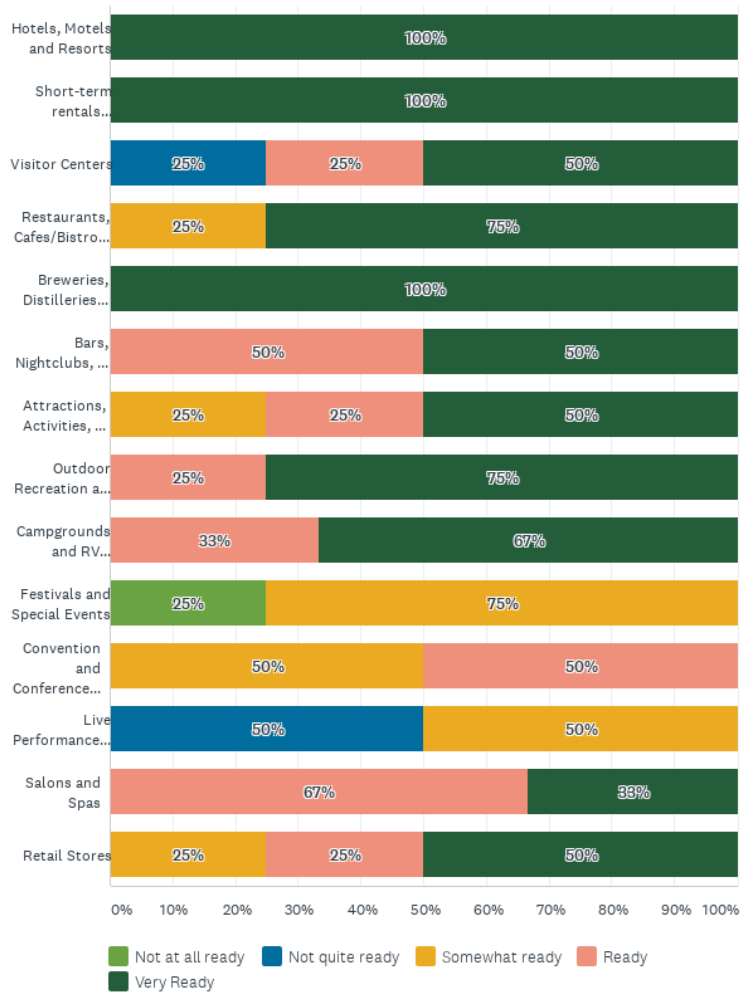
- Accommodations (hotels, motels, resorts, and short term rentals)
- Breweries, Distilleries, and Wineries
- Campgrounds and RV Facilities

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities
- Visitor Centers

Notably, overall readiness increased in most categories, but Retail Stores were rated less ready overall in Wave II.

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



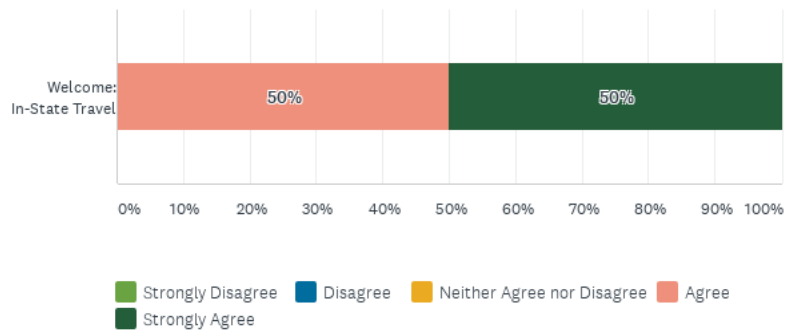


CLASSIC SOUTH, CONTINUED

Readiness to Welcome In-State Travelers

In the Classic South, respondents once again said residents were overwhelmingly willing to welcome in-state travelers – 100% either Strongly Agreed or Agreed.

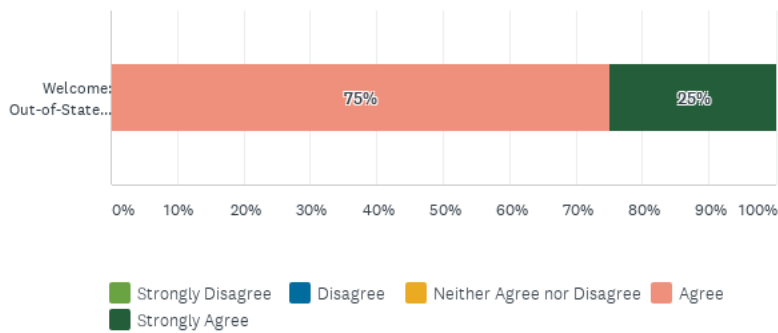
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents also said their residents would be overwhelmingly willing to welcome travelers from outside Georgia - 100% either Strongly Agreed or 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.”



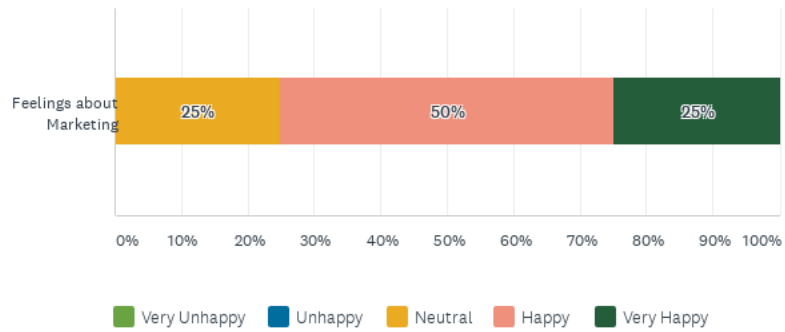


CLASSIC SOUTH, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

While much improved from Wave I, some uncertainty surrounding resident sentiment about seeing their community advertised to tourists remained, with 25% of respondents reporting their residents 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?



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THE COAST

Overall Readiness

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

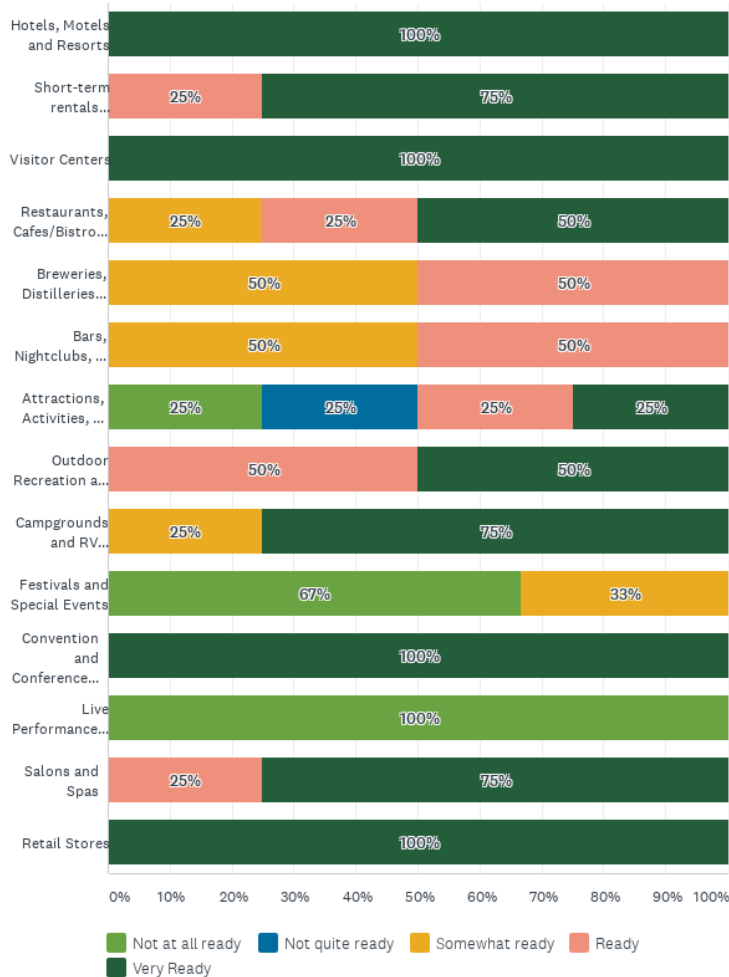
- Accommodations (hotels, motels, resorts, and short term rentals)
- Visitor Centers
- Convention and Conference Facilities
- Retail Stores

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Attractions, Activities, and Tours

Notably, overall readiness increased in most categories, and Convention and Conference Facilities went from being among the least to most ready assets.

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



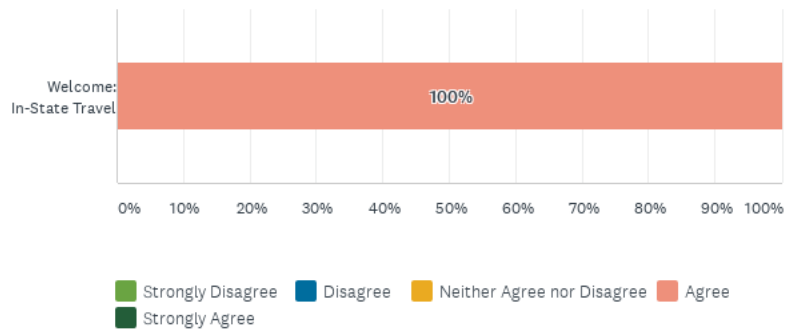
EXPLORE GEORGIA

THE COAST, CONTINUED

Readiness to Welcome In-State Travelers

In the Coast, respondents said their residents were overwhelmingly willing to welcome in-state travelers - 100% Agreed.

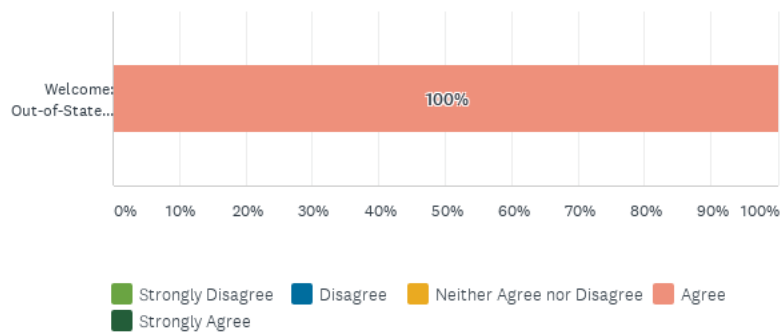
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents also said their residents would be overwhelmingly willing to welcome travelers from outside Georgia – 100% 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.”



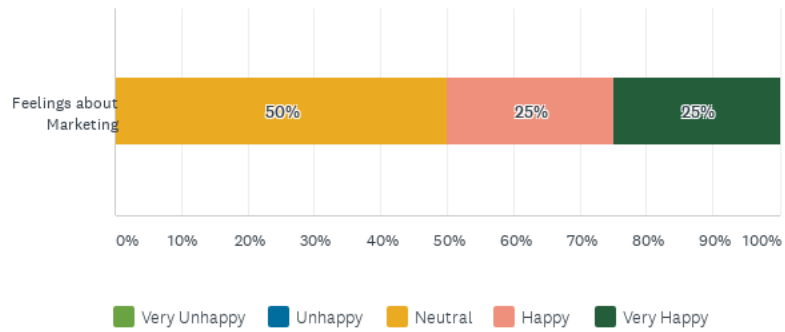


THE COAST, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

While much improved from Wave I, greater uncertainty surrounding resident sentiment about seeing their community advertised to tourists remained, with 50% of respondents reporting their residents 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?



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HISTORIC HEARTLAND

Overall Readiness

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

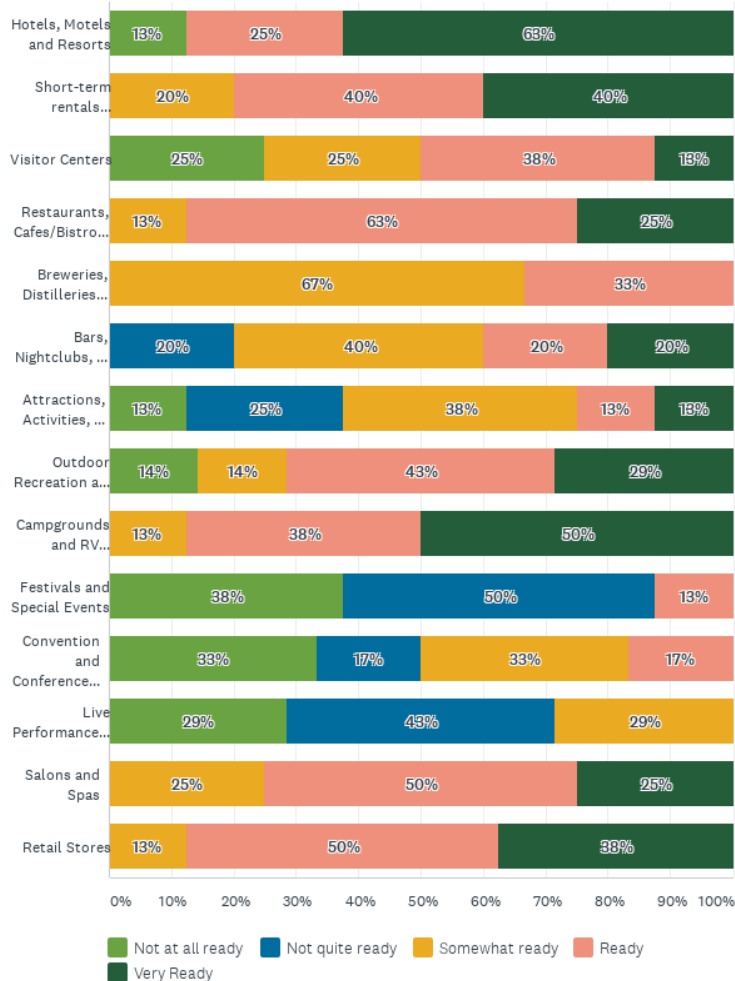
- Accommodations (hotels, motels, resorts, and short term rentals)
- Campgrounds and RV Facilities
- Retail Stores
- Restaurants, Cafes/Bistros, and Other Dining Establishments

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities
- Attractions, Activities, and Tours

Notably, while overall readiness increased in many categories, Very Ready rankings decreased.

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

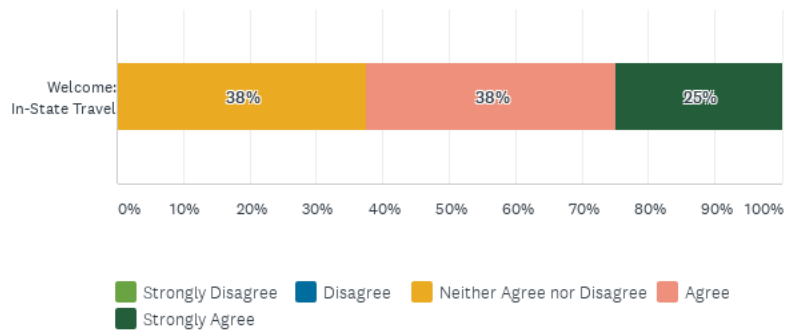


HISTORIC HEARTLAND, CONTINUED

Readiness to Welcome In-State Travelers

In the Historic Heartland, once again the majority (63%) of respondents either Agreed or Strongly Agreed about their residents being willing to welcome in-state travelers.

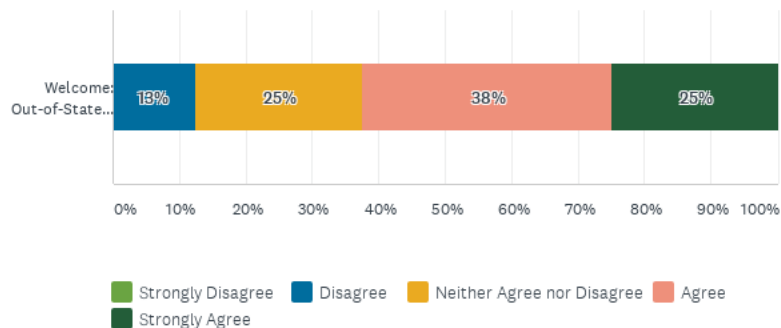
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

While the majority (63%) of respondents said their residents were willing to welcome travelers from outside Georgia, some Disagreement (13%) persisted.

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.”



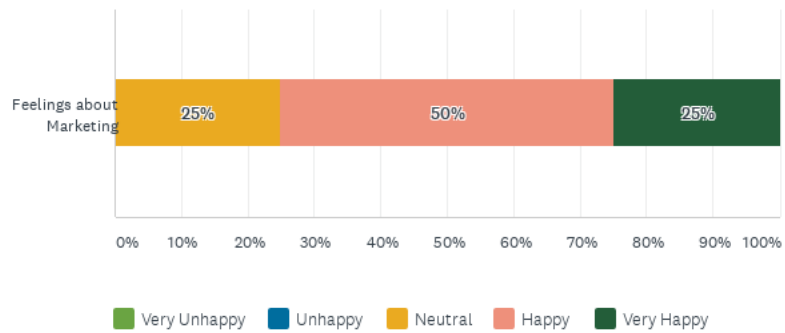


HISTORIC HEARTLAND, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

The Historic Heartland region again reported residents being quite welcoming in terms of seeing their community advertised to tourists, with 75% of respondents reporting 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

Given the scarce number of respondents from this region (one destination promoter), the readiness of all types of tourism assets cannot be established, and results are likely over-simplified. Please use with caution.

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

- Accommodations (hotels, motels, resorts, and short term rentals)
- Visitor Centers
- Salons and Spas

The tourism assets that need the most time to prepare could not be established from Wave II data.

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

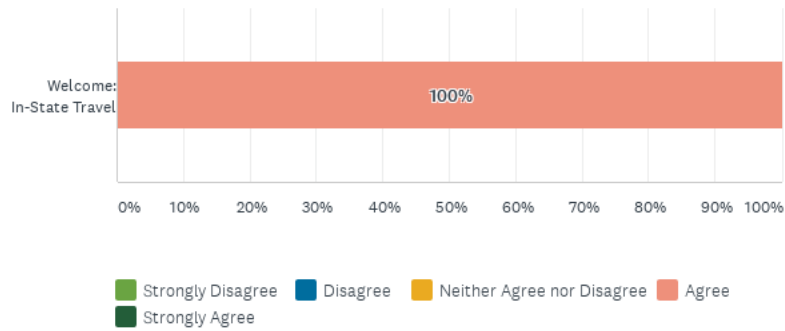


HISTORIC HIGH COUNTRY, CONTINUED

Readiness to Welcome In-State Travelers

In the Historic High Country, the respondent Agreed about their residents being willing to welcome in-state travelers.

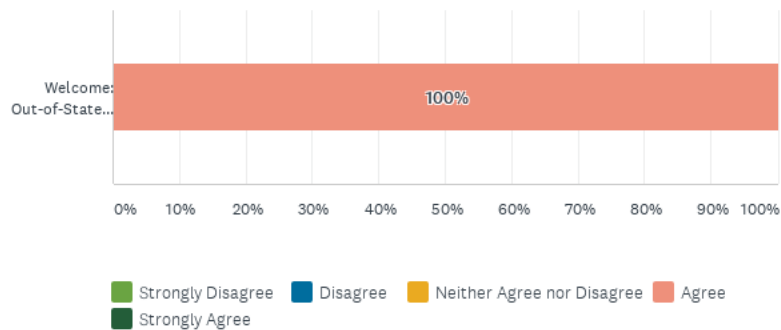
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

The respondent also 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.”



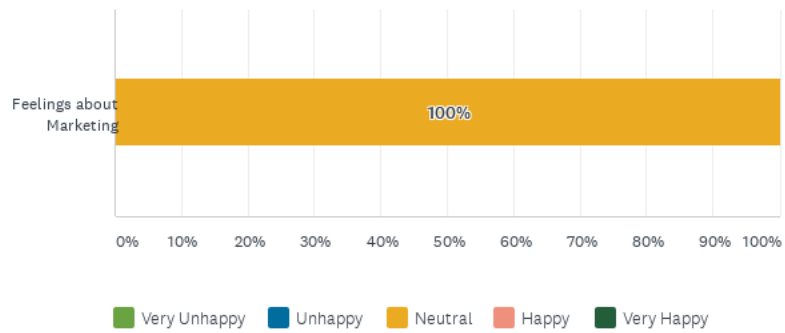


HISTORIC HIGH COUNTRY, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

However, the respondent said their residents would feel Neutral about seeing their community advertised to tourists.

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



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MAGNOLIA MIDLANDS

Overall Readiness

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

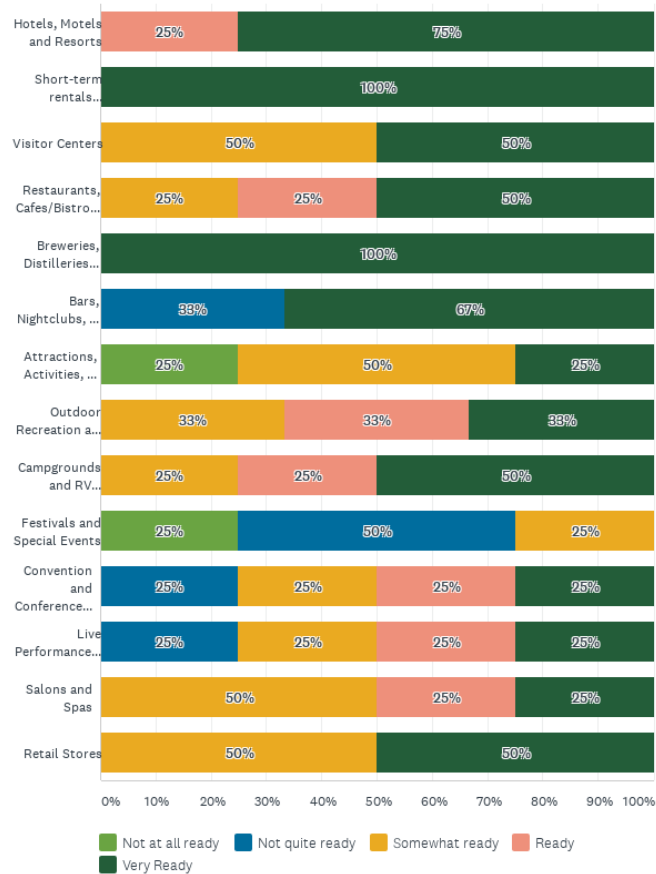
- Accommodations (hotels, motels, resorts, and short term rentals)
- Breweries, Distilleries, and Wineries
- Restaurants, Cafes/Bistros, and other Dining Establishments
- Campgrounds and RV Facilities

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Attractions, Activities, and Tours
- Convention and Conference Facilities

Notably, overall readiness increased in most categories, but Festivals and Special Events were rated less ready overall this wave.

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



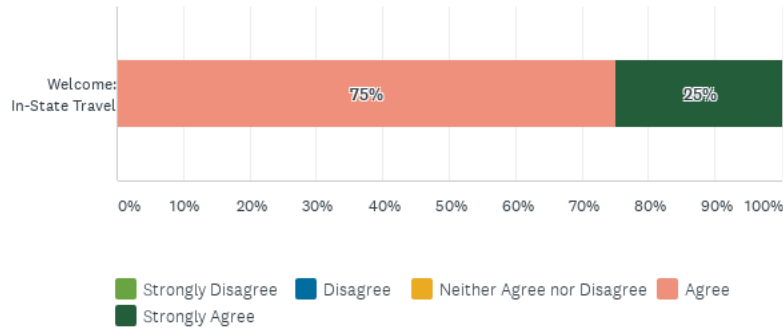
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MAGNOLIA MIDLANDS, CONTINUED

Readiness to Welcome In-State Travelers

In the Magnolia Midlands, respondents said their residents were overwhelmingly willing to welcome in-state travelers - 100% either Strongly Agreed or Agreed.

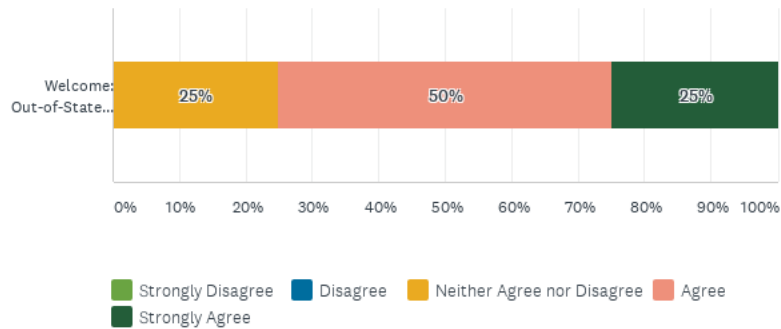
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents also said their residents would be willing to welcome travelers from outside Georgia - 75% either Strongly Agreed or 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.”



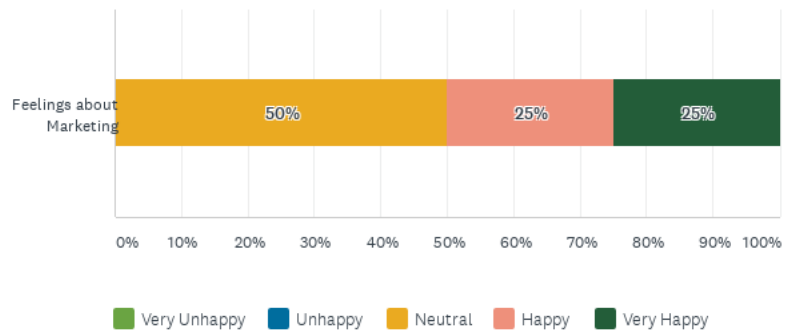


MAGNOLIA MIDLANDS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

While much improved from Wave I, uncertainty surrounding resident sentiment about seeing their community advertised to tourists remained, with 50% of respondents reporting their residents 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?



EXPLORE GEORGIA

NORTHEAST GEORGIA MOUNTAINS

Overall Readiness

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

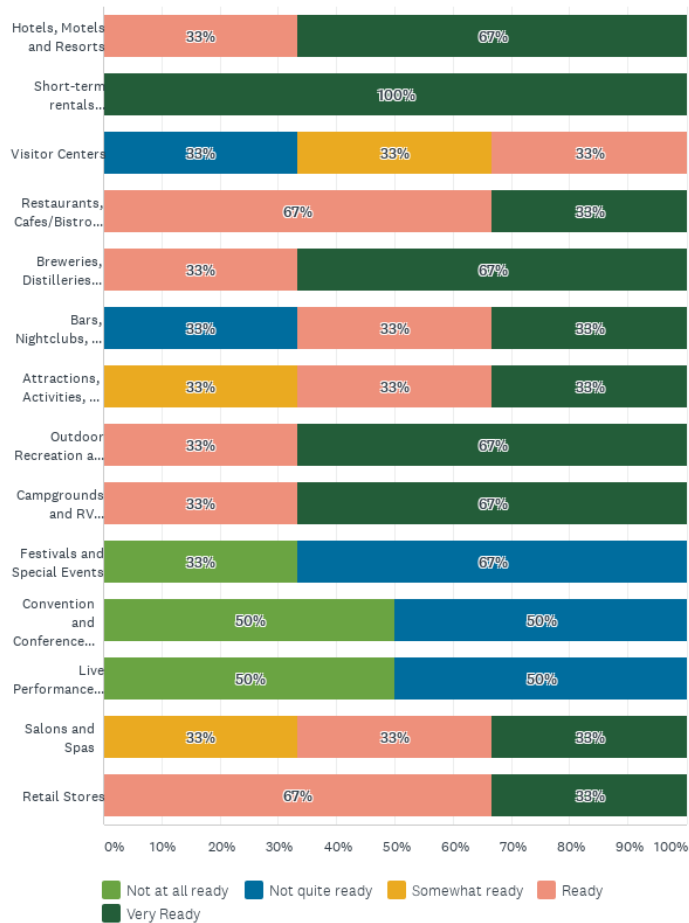
- Accommodations (hotels, motels, resorts, and short term rentals)
- Outdoor Recreation Opportunities
- Campgrounds and RV Facilities
- Breweries, Wineries, and Distilleries

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Convention and Conference Facilities
- Visitor Centers

Notably, overall readiness increased in many categories, but all of the “least ready” assets were rated even less ready this wave.

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



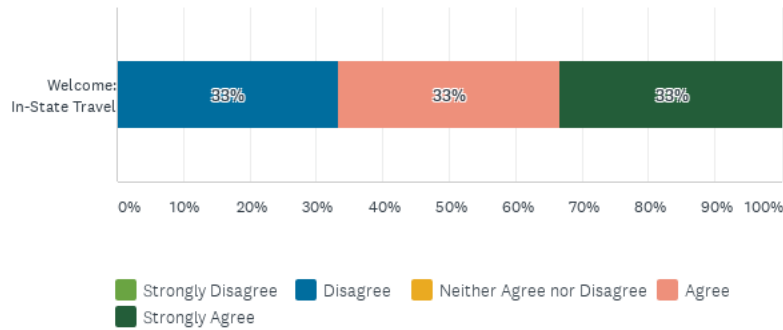
EXPLORE GEORGIA

NORTHEAST GEORGIA MOUNTAINS, CONTINUED

Readiness to Welcome In-State Travelers

In Northeast Georgia Mountains, while respondents voiced greater Disagreement this wave, the majority (66%) either Agreed or Strongly Agreed about their residents being willing to welcome in-state travelers.

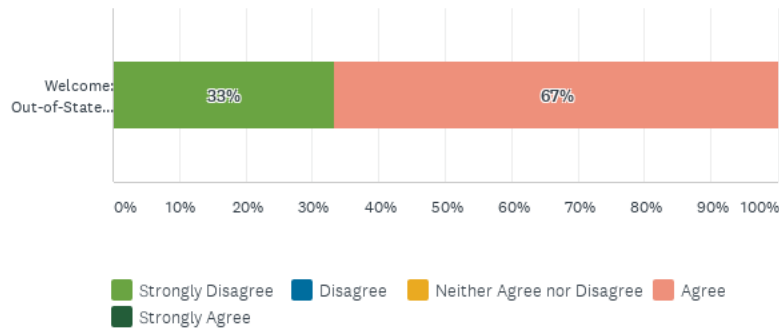
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

While more respondents Strongly Disagreed this wave, the majority (67%) 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.”



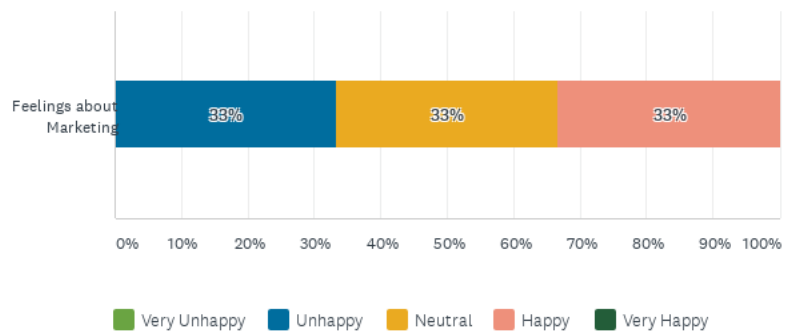


NORTHEAST GEORGIA MOUNTAINS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

Uncertainty surrounding resident sentiment about seeing their community advertised to tourists grew, with 66% of respondents reporting 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

PLANTATION TRACE

Overall Readiness

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

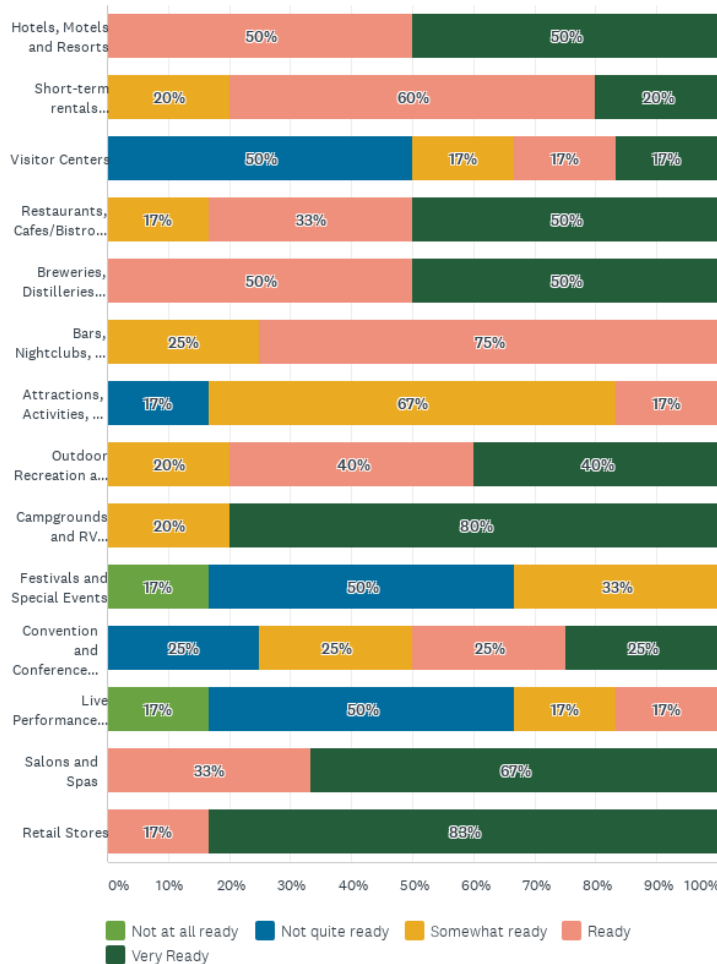
- Retail Stores
- Salons and Spas
- Breweries, Distilleries, and Wineries
- Accommodations (hotels, motels, resorts, and short term rentals)

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Attractions, Activities, and Tours
- Visitor Centers

Notably, overall readiness increased in most categories, but Attractions, Activities, and Tours were rated less ready in Wave II.

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

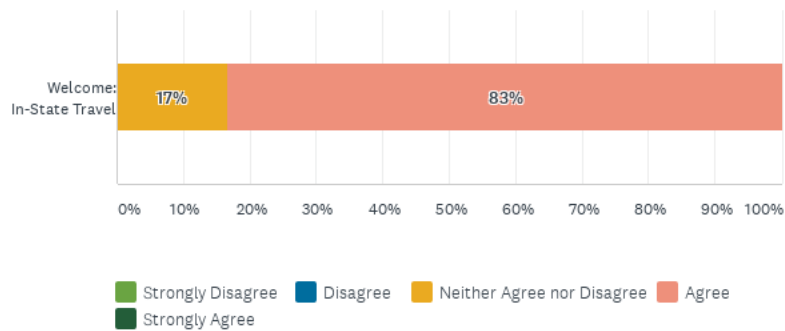


PLANTATION TRACE, CONTINUED

Readiness to Welcome In-State Travelers

In Plantation Trace, a strong majority (83%) of respondents Agreed about their residents being willing to welcome in-state travelers.

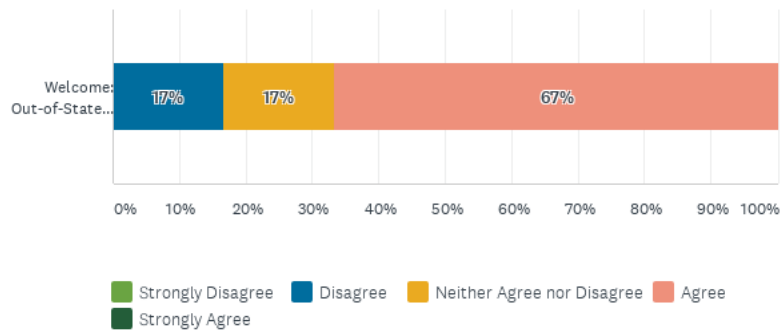
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Additionally, a majority (67%) of respondents Agreed about their residents’ willingness to welcome travelers from outside Georgia. Disagreement decreased this wave, but so did Strong Agreement.

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.”

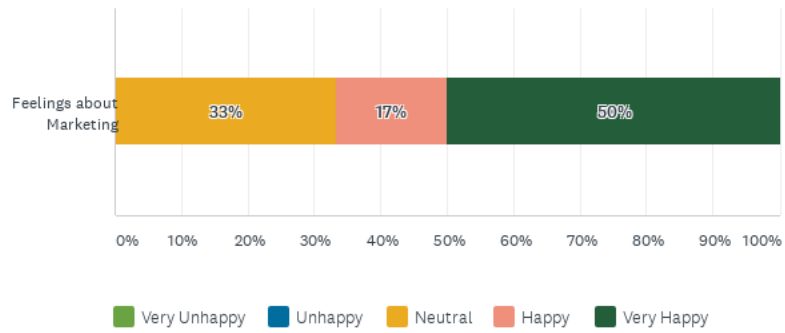


PLANTATION TRACE, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

While much improved from Wave I, some uncertainty surrounding resident sentiment about seeing their community advertised to tourists remained, with 33% of respondents reporting their residents 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?



EXPLORE GEORGIA

PRESIDENTIAL PATHWAYS

Overall Readiness

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

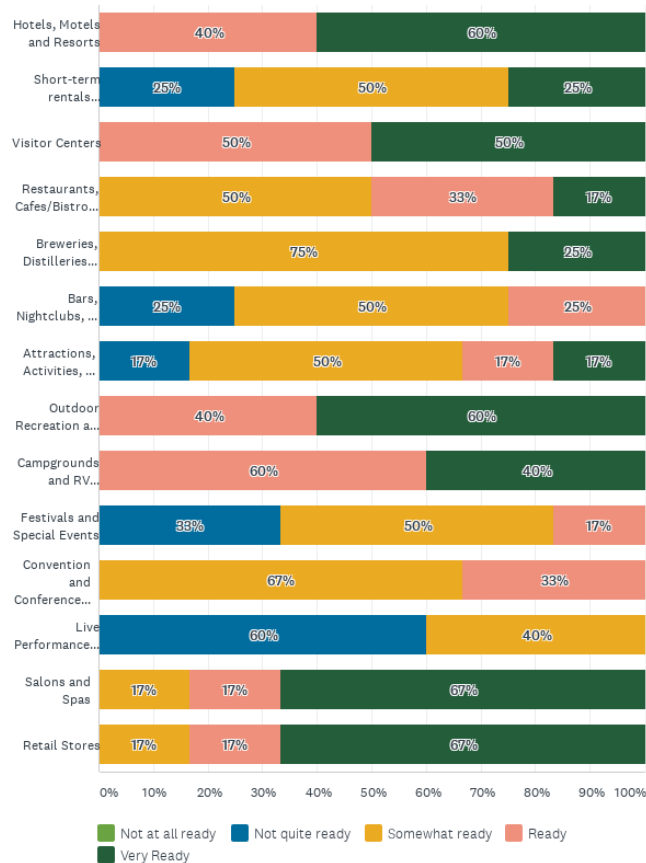
- Hotels, Motels and Resorts
- Visitor Centers
- Campgrounds and RV Facilities
- Outdoor Recreation Opportunities

Additional time to prepare is needed for these tourism assets:

- Live Entertainment (performance venues and festivals and events)
- Bars, Nightclubs and other Nightlife
- Short-Term Rentals

Notably, overall readiness increased for several categories, but Restaurants/Cafes/Other Dining Establishments; Breweries, Wineries, and Distilleries; and Attractions, Activities, and Tours were all rated less ready this wave.

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

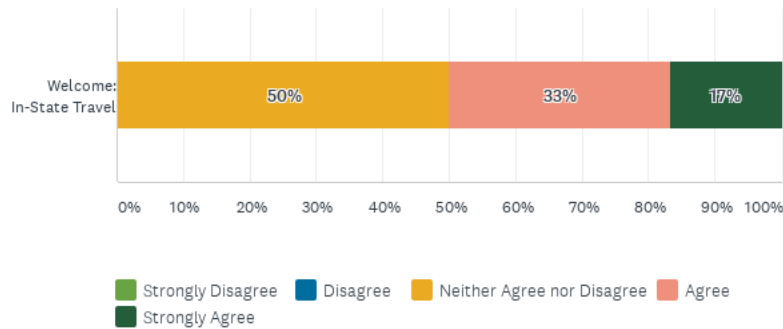


PRESIDENTIAL PATHWAYS, CONTINUED

Readiness to Welcome In-State Travelers

In Presidential Pathways, respondents were split about their residents being willing to welcome in-state travelers, with 50% either Agreeing or Strongly Agreeing. While Disagreement declined over Wave I, so did overall Agreement.

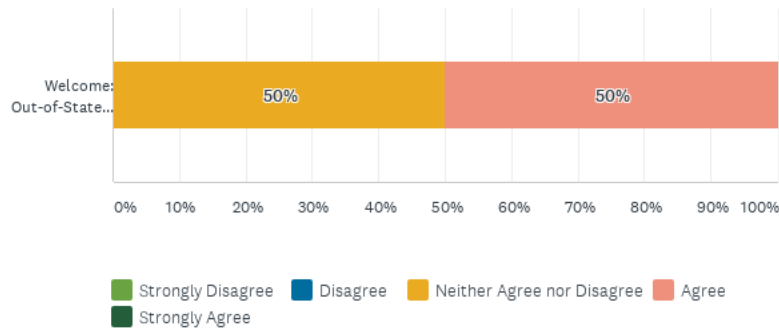
Q: As of today, how much do you agree with the following statement: “Our residents are ready to welcome in-state travelers to visit their community right now.”



Readiness to Welcome Out-of-State Travelers

Respondents were also split about their residents’ willingness to welcome travelers from outside Georgia, with 50% Agreeing. While Disagreement declined over Wave I, so did Strong Agreement.

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.”



PRESIDENTIAL PATHWAYS, CONTINUED

Resident Sentiment around Tourism Advertising Promotion

Respondents were divided along the same lines regarding their residents' sentiment about seeing their community advertised to tourists, with 50% reporting their residents would feel 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?

