EXPLORE GEORGIA

COVID-19 DASHBOARD

May/June 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

May/June 2020

- With fewer restrictions in place and buoyed by the federal stimulus injection and pent up trip demand, the tourism industry entered a modest recovery phase in May and June as travelers began embarking on cautious summer road trips.
- Employment, travel spending, and visitation conditions all improved month-over-month in Georgia.
- As national and local COVID-19 outbreaks began to surge, momentum stuttered towards the end June.
- Safety concerns remain paramount, and most travelers agree with strict destination health protocols, including facemasks.
- 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.
- May and June saw record-breaking traffic on ExploreGeorgia.org.
- At the time of this dashboard publication, traveler sentiment, previously on the rise, has reversed in almost every capacity.
- Nevertheless, weekly travel spending in Georgia has remained 75%-80% above the national average, and while momentum may be stagnating, we know travelers are still moving about the state and engaging in trip planning behavior.
- Destinations' challenge is to make potential travelers feel they "have the visitor's back", regardless of what anyone else is doing.

GEORGIA'S TOURISM INDUSTRY: CURRENT STATUS

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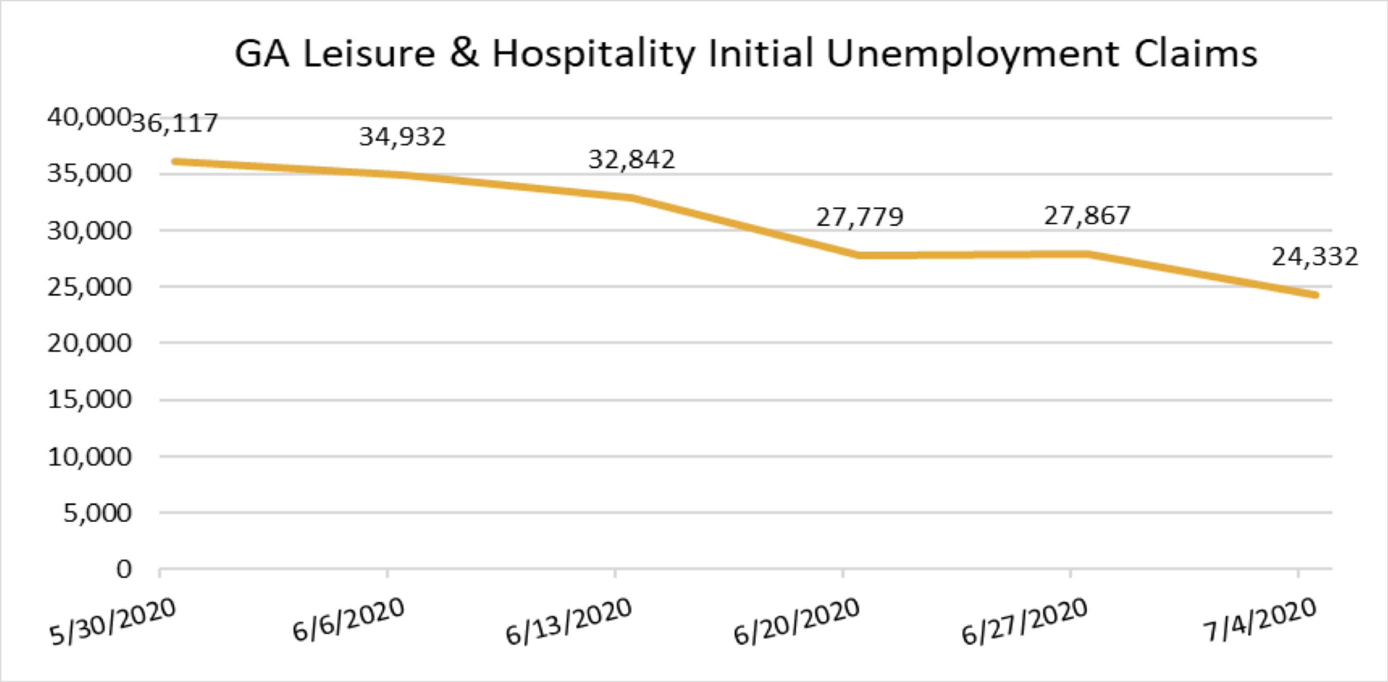
GEORGIA UNEMPLOYMENT: MAY & JUNE

The unemployment rate in Georgia fell from a record 12.6% in April (revised up from the 11.9% initially reported) to 9.4% in May, and to 7.6% in June. In the months of May and June, total Non-Farm Employment grew by 231,400 jobs, 113,200 (49%) of which were Leisure & Hospitality jobs (the “Accommodations and Food Services” and “Arts, Entertainment and Recreation” sectors).

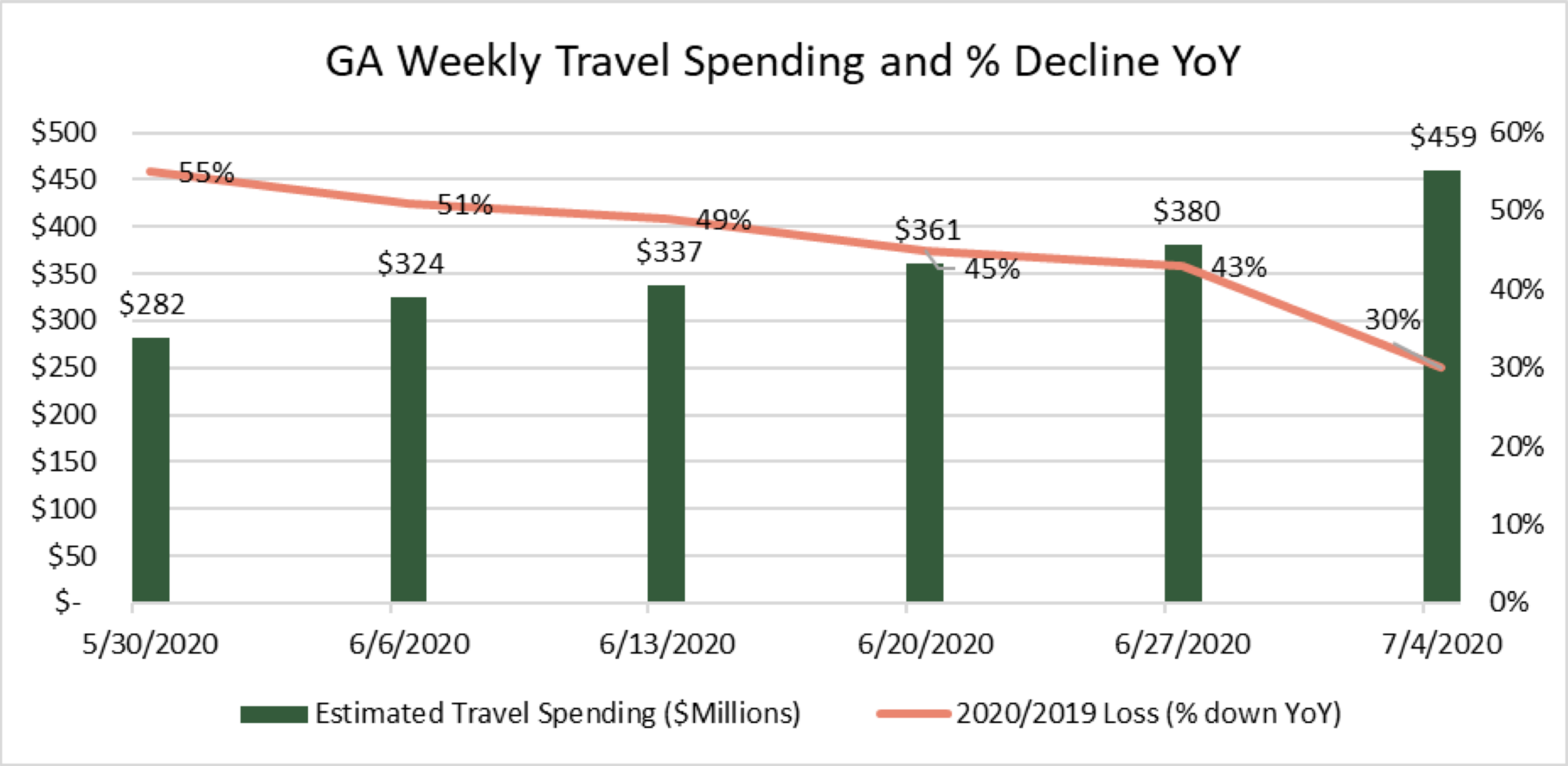
Weekly Leisure and Hospitality Initial Unemployment Claim filings are still falling, but continue to represent a fifth to a quarter of all weekly IUCs, and the decline has been leveling out.



Source: Georgia Department of Labor

GEORGIA TRAVEL SPENDING: MAY & JUNE

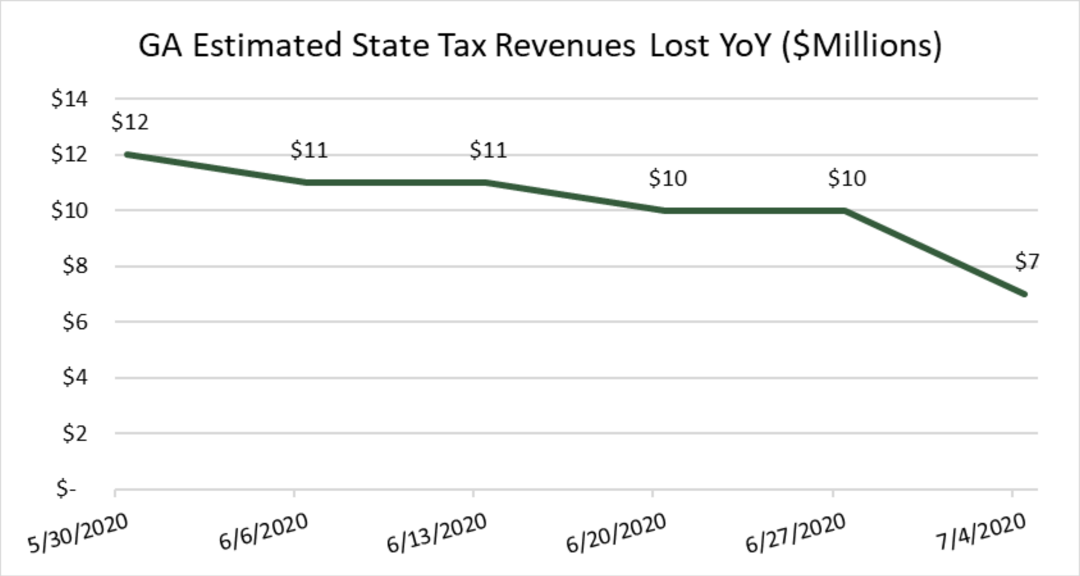
From the week ending May 30 through the week ending July 4, total estimated travel spending in Georgia was down $1.78 billion in 2020, compared to 2019. The July 4th weekend marked 12 consecutive weeks of travel spending growth in Georgia, with weekly expenditures 81% higher than the national average (including Washington D.C. and Puerto Rico).

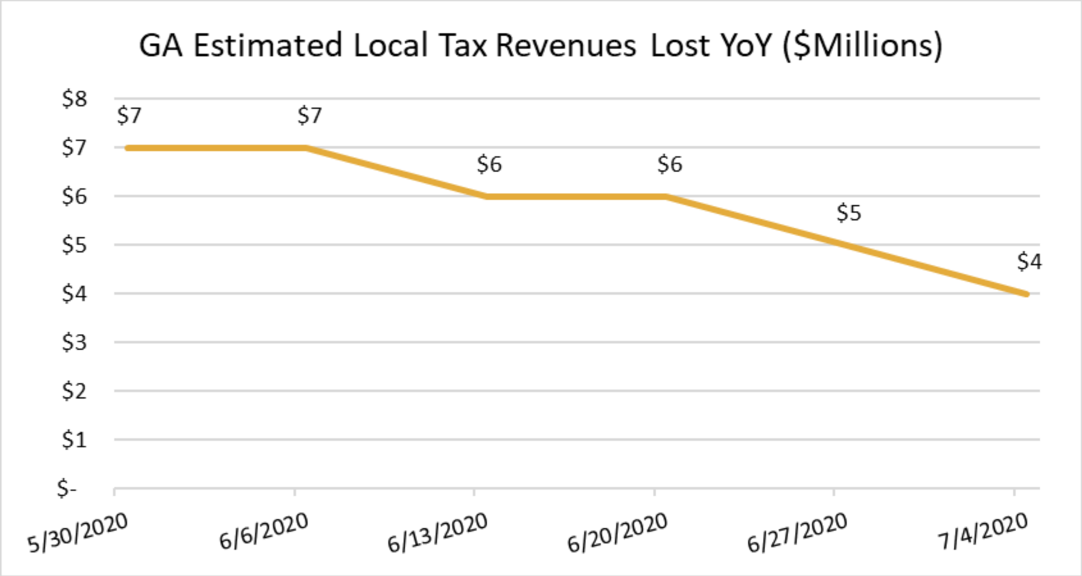


Source: Tourism Economics

GEORGIA TAX REVENUES: MAY & JUNE

From the week ending May 30 through the week ending July 4, total estimated travel-generated state and local tax revenues in Georgia were down $96 million in 2020, compared to 2019. Since early May, weekly tax revenue losses have continued to improve in tandem with travel expenditure growth.

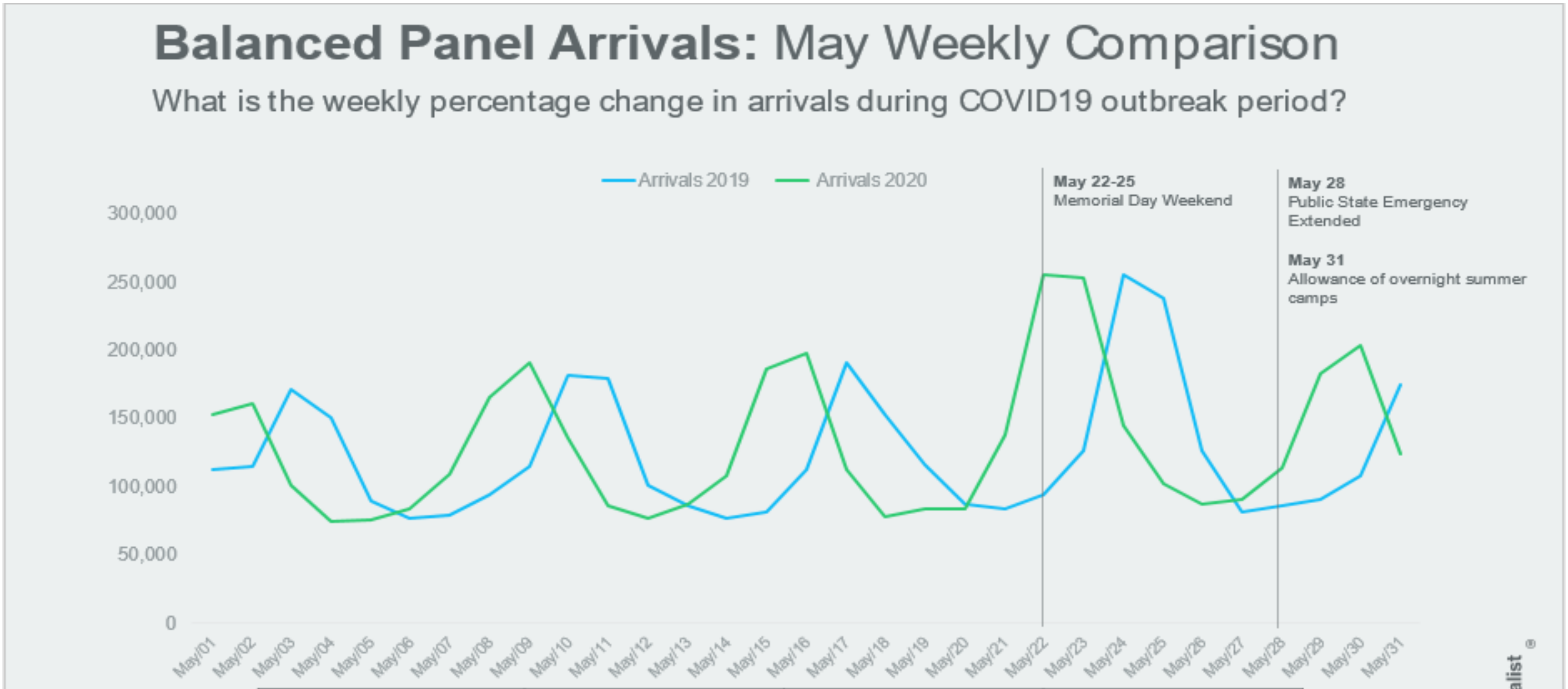




Source: Tourism Economics

GEORGIA DOMESTIC VISITATION: MAY 2019 & 2020

In 2019, 6.8% of trips* to/within Georgia occurred in May. In 2020, as more and more restrictions were lifted throughout the state and confirmed COVID-19 cases began a modest decline, daily arrivals rebounded.



YOY △	-2.5%	4.0%	3.6%	6.5%
WOW △	-	12.5%	3.6%	19.1%

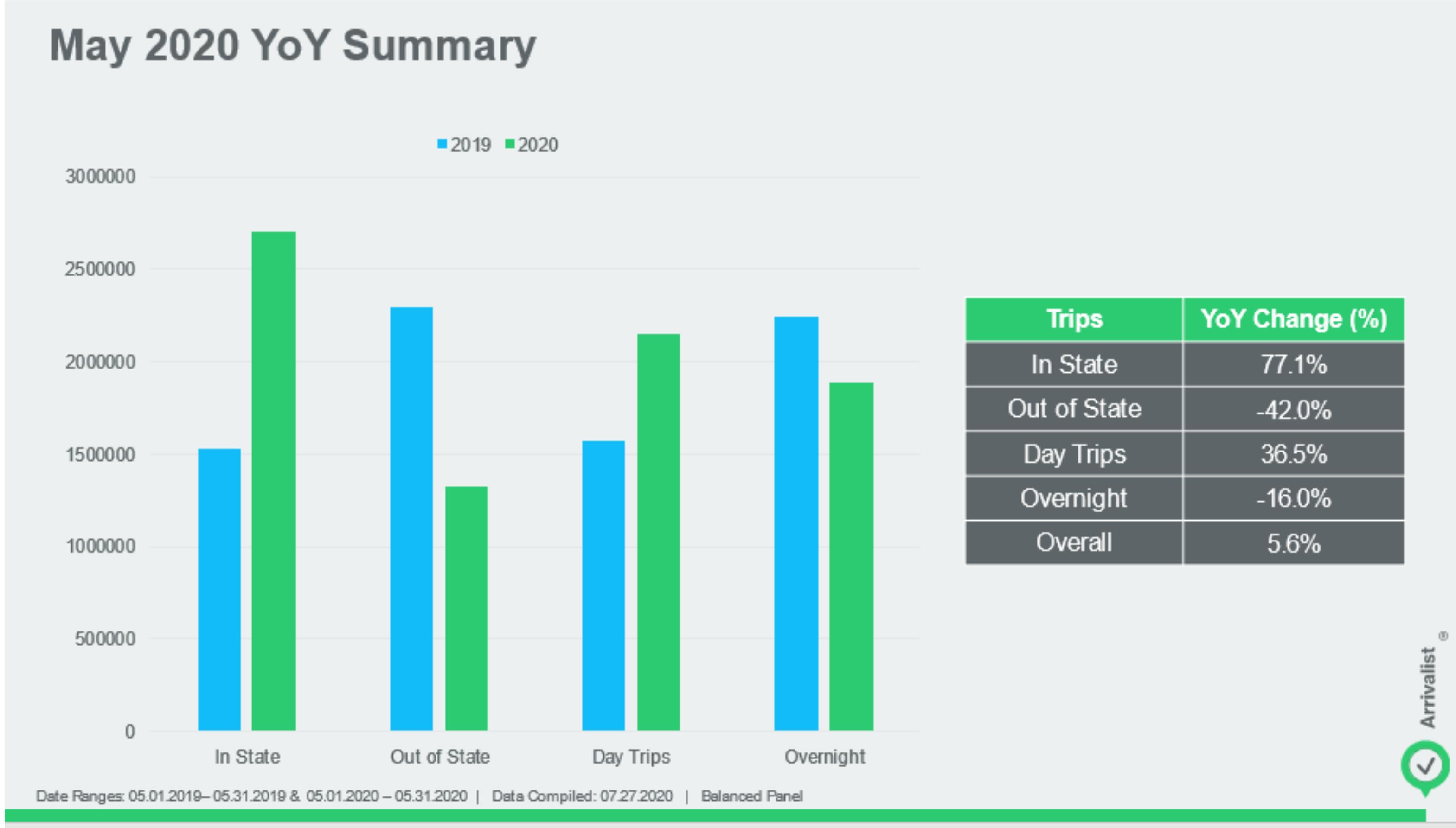
Date Ranges: 05.01.2019– 05.31.2019 & 05.01.2020 – 05.31.2020 | Data Compiled: 07.27.2020 | Balanced Panel

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: MAY YOY

Trips* in May grew by 5.6% YoY. While the out-of-state and overnight trip segments registered significant declines, the overall increase was driven by impacts on the in-state and day trip segments.



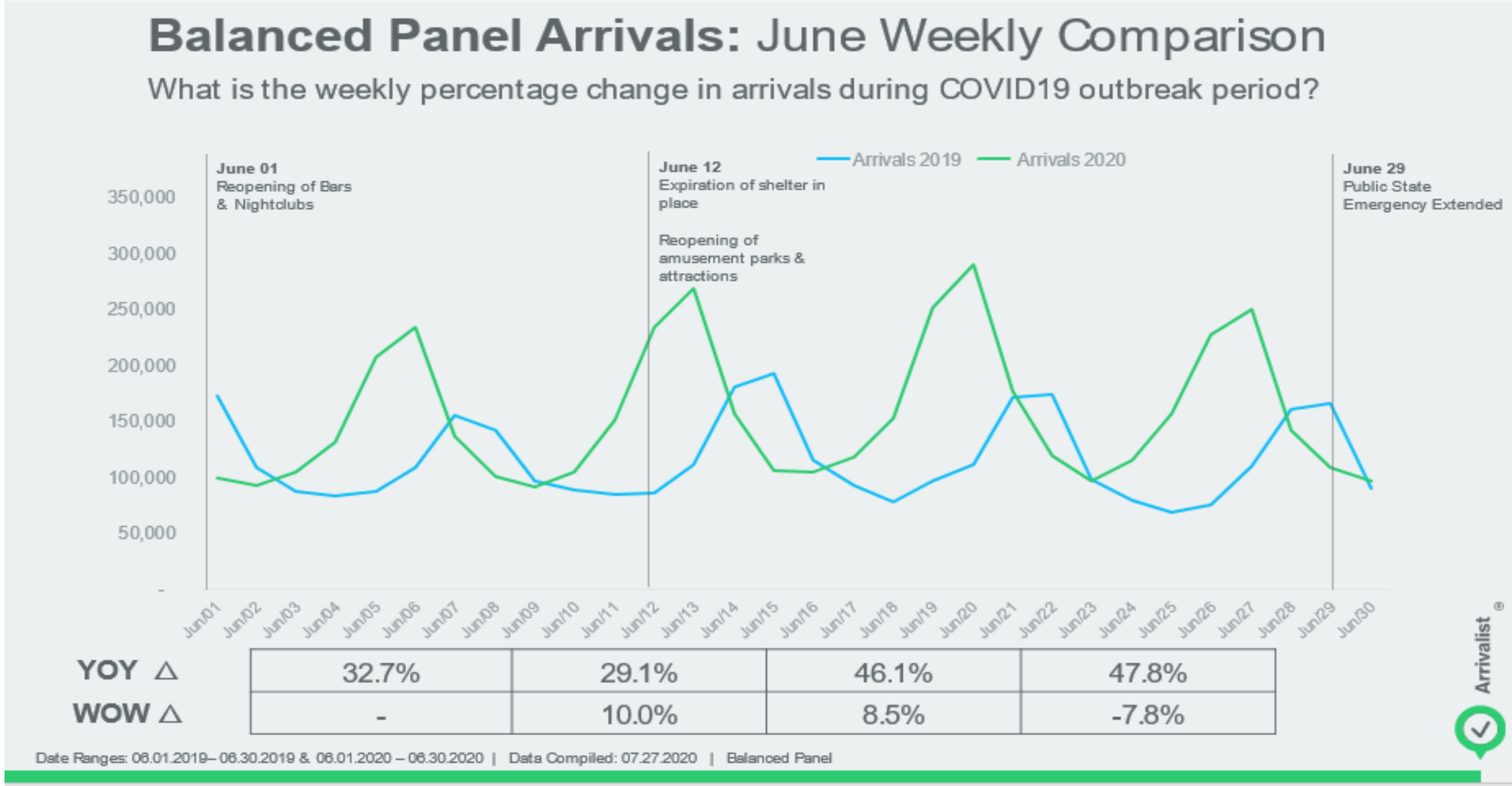
Trips	YoY Change (%)
In State	77.1%
Out of State	-42.0%
Day Trips	36.5%
Overnight	-16.0%
Overall	5.6%

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 $\geq$ 2 hours and the majority of their trip in the arrival zone.

GEORGIA DOMESTIC VISITATION: JUNE 2019 & 2020

In 2019, 6.7% of trips* to/within Georgia occurred in June. In 2020, pent up travel demand from "lockdown" months, combined with further relaxation of restrictions, propelled YoY gains in daily arrivals (despite surging COVID-19 cases).

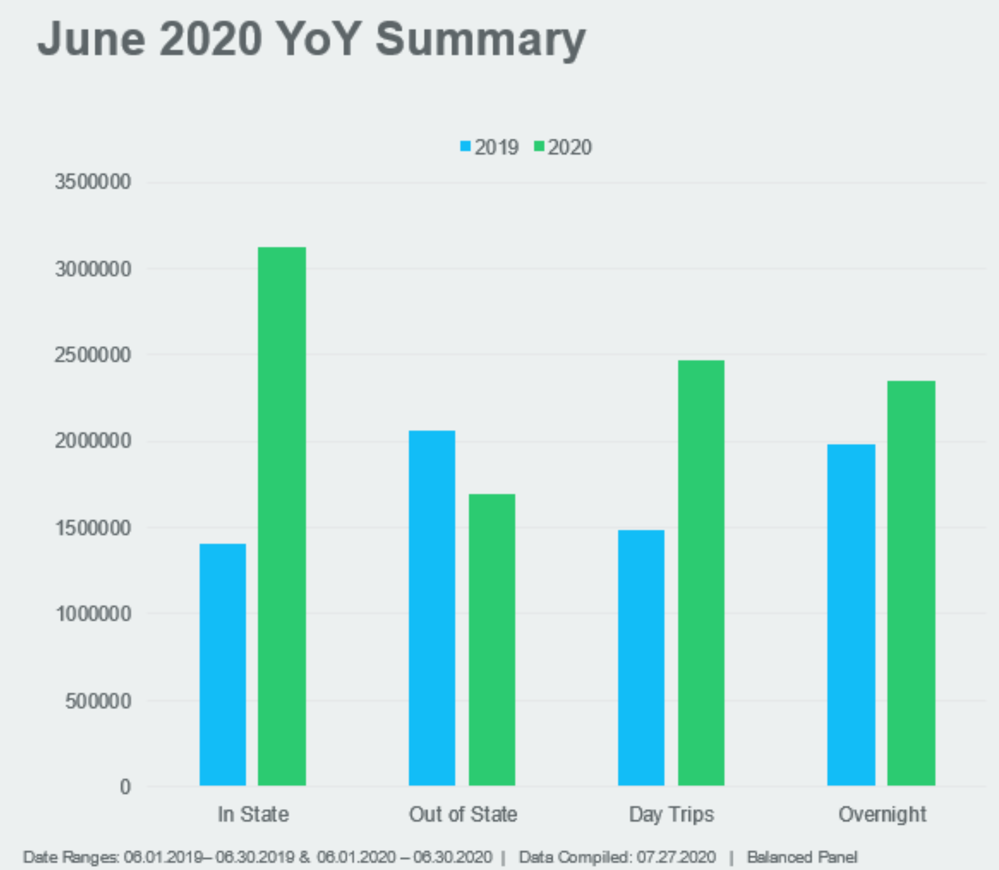


Source: Arrivalist

**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: JUNE YOY

Trips* in June increased 39.1% YoY, driven by massive gains in the in-state and day trip segments. While out-of-state trips remained depressed YoY, for the first time during the pandemic, the overnight segment registered YoY improvement.



Trips	YoY Change (%)
In State	122.9%
Out of State	-17.9%
Day Trips	66.8%
Overnight	18.4%
Overall	39.1%

Arrivalist®

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 INDUSTRY METRICS: LODGING AND FLIGHTS

In June, Georgia Hotel Rooms Sold and RevPAR were down 33% and 50%, respectively, compared to 2019 (a marked improvement over April and May's figures). Since hitting a low point in the third week of April, U.S. Hotel Occupancy and RevPAR – while still significantly depressed compared to 2019 – have been climbing week-over-week.

Also in June, passenger traffic was down 84.1% compared to 2019 at Hartsfield-Jackson International Airport, a 10 point improvement since April.

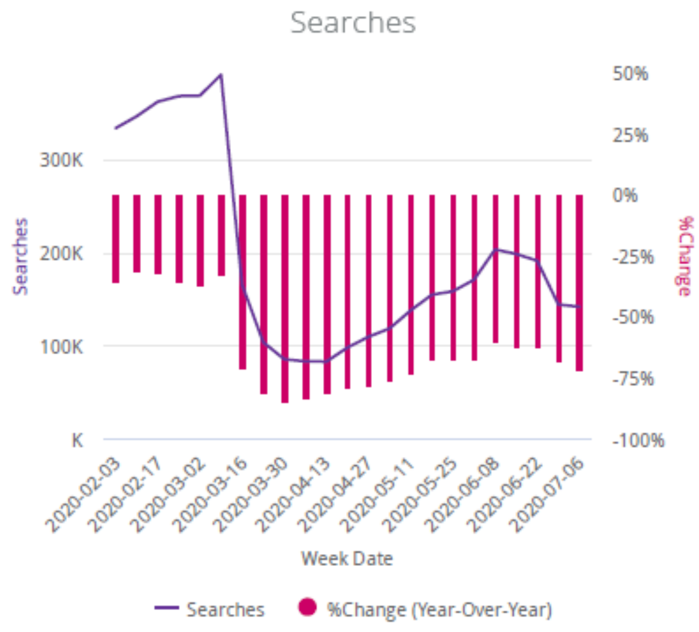
	May 2020	Jan-May 2020 YTD	June 2020	Jan-Jun 2020 YTD
Hotel RevPAR YoY	-63.0%	-43.4%	-50.3%	-44.5%
Hotel Rooms Sold YoY	-46.0%	-31.1%	-33.3%	-31.5%
Domestic Passenger Traffic YoY	-90.6%	-49.7%	-82.3%	-55.6%
International Passenger Traffic YoY	-98.1%	-56.5%	-96.9%	-64.2%
Total Passenger Traffic YoY	-91.4%	-50.5%	-84.1%	-56.6%

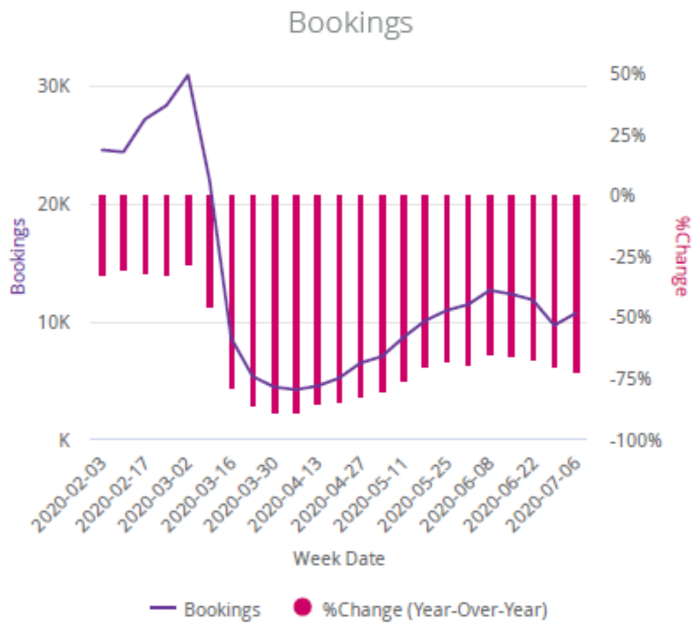
Sources: STR, Inc.; Hartsfield-Jackson Atlanta International Airport

GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

Aggregate Search and Booking activity for Georgia flights and hotels from both domestic and international markets bottomed out in early April (-83% YoY for Searches and -88% YoY for Bookings), and followed a steady upward trajectory in the months of May and June.

However, the trend has since reverted downwards after peaking mid-June, with the week of 7/6 landing at -71% YoY for Searches and -72% YoY for Bookings.





Source: ADARA

GEORGIA'S TOURISM INDUSTRY: CURRENT INDICATORS

EXPLORE GEORGIA

CHECKING THE PULSE: TRAVELER SENTIMENT

- The proportion of travelers open to or excited about travel inspiration and information has been in flux, but recently rebounded to 45%
- An emerging and strengthening trend in travel sentiment is that travel is not truly "worth it" right now
  - Travelers aren't motivated to plan a trip when they feel it will just be a scenic version of home quarantine; things are closed or not at full operational status; they won't be able to sit down in a restaurant or swim; they can't really relax or escape the stress at home; they can't meet new people or have enriching cultural experiences
  - 61% of travelers feel they wouldn't be able to fully enjoy a leisure trip right now
  - 50% feel they've just lost interest in travel as a whole for the time being

Sources: Destination Analysts; Engagious; Longwoods International & Miles Partnership; MMGY Global ; Skift Research

CHECKING THE PULSE: TRAVELER SENTIMENT

- 62% of travelers now feel the pandemic will worsen in the U.S. in the next month – the worst the outlook has been since late March
    - 77% now expect COVID-19 to affect their travel plans (on par with early May levels), with cancellations more common than postponements or reductions
- The proportion of those who feel safe travelling outside their community has been in decline, now just 38% (on par with conditions in early-mid May)
- Only 55% of travelers are now anticipating any type of leisure trip in 2020 (down from a high of 70% in early June)
    - 48% say they'd be excited to take a getaway in the next month (down from a high of 58% at the end of May)
    - Hesitation to travel in the remaining half of the year is likely due to increasing worries about a second wave, and resulting event cancellations and lockdowns

Sources: Destination Analysts; Engagious; Longwoods International & Miles Partnership; MMGY Global ; Skift Research

CHECKING THE PULSE: TRAVELER SENTIMENT

- Only 1/3 of business travelers now anticipate a domestic business trip in the next six months, down from 41% in June
    - Likelihood of attending an off-site business meeting, conference, or convention is also down slightly (18%-20% compared to 20%-22% in June)
    - Group travel has made modest gains since April, in terms of likelihood to be taken in the next six months, group tours are on par with cruises at 16% likely or very likely
- After fluctuations in months past, travelers now feel equally safe in vacation rentals as in hotels/resorts
- Contraction in near-future travel plans has caused travelers to be more optimistic about long-term travel potential
    - 16% expect to take more leisure trips in the next 12 months than they did in the last 12 (up from 14% in May)
    - Also up is the proportion of people who plan to prioritize travel in their budget in the next 12 months, over 17% plan to make it a high/extremely high priority, compared to 13% in May

Sources: Destination Analysts; Engagious; Longwoods International & Miles Partnership; MMGY Global ; Skift Research

CHECKING THE PULSE: TRAVELER BEHAVIOR

- October and November are the most popular months for future travel plans, followed by September and December
- Travelers continue to report being twice as likely to travel in their personal vehicle than by any other form of transportation
  - The most popular months for expected road trips are now August and September
  - On average, they expect to drive 280-300 miles from home (though 15%-20% expect to drive over 500 miles)
- The most popular month for expected air trips is December, though 30% say it will be sometime next year before they board a plane (and another 11% say they won't fly until 2022 or later)
  - On average, travelers expect to fly just over 1,000 miles from home

Sources: Destination Analysts; Engagious; Longwoods International & Miles Partnership; MMGY Global ; Skift Research

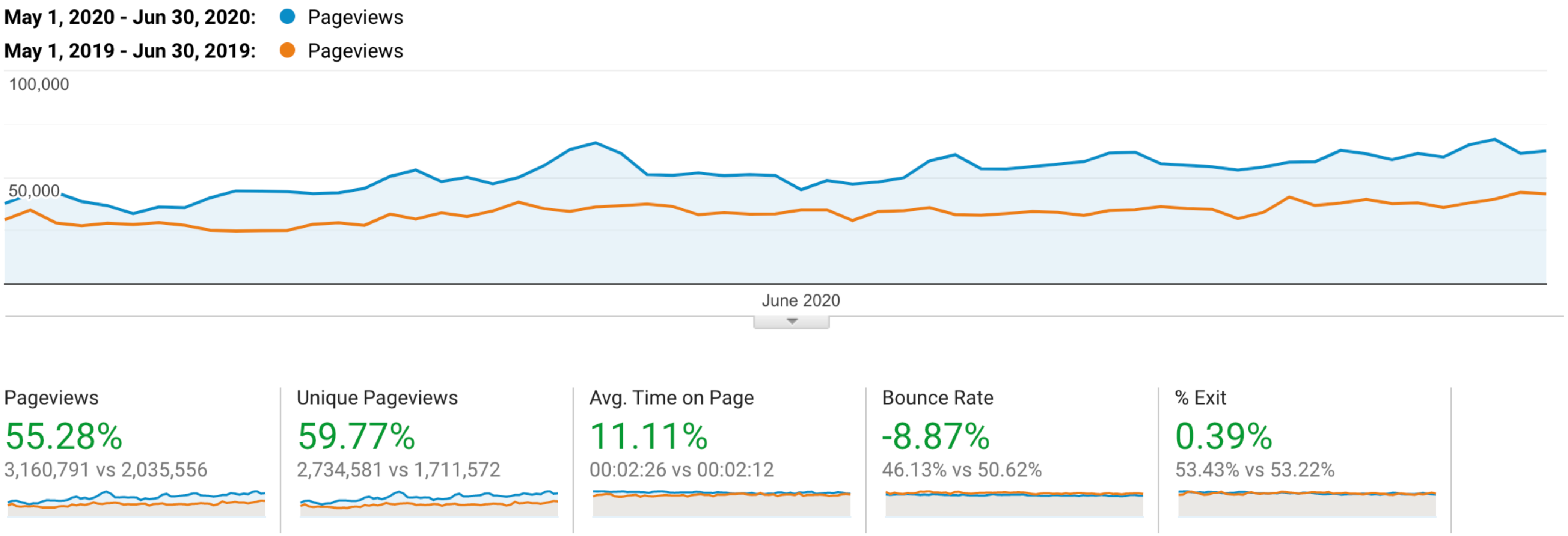
CHECKING THE PULSE: TRAVELER BEHAVIOR

- The ability for destinations to motivate travelers with deals is collapsing; now just 28% say discounts make them more interested in travel in the next 3 months (down from a record high of 39% at the end of May)
- Rural citizens, Men, and members of the Gen X and Millennial generations are the least hesitant about travel
- Agreement with and adherence to pandemic etiquette is on the rise
    - 81% agree that facemasks should be worn in public, and 75% intend to wear one during their trips in the next six months; 69% intend to social distance, and 64% intend to avoid crowds
    - Between 60%-67% said they would prefer if destinations required visitors and residents to wear masks in public
    - Only 2%-3% said a mask mandate would be enough to dissuade them from visiting

Sources: Destination Analysts; Engagious; Longwoods International & Miles Partnership; MMGY Global ; Skift Research

WEBSITE: TRAFFIC

For the months of May and June, we saw a record-breaking traffic on the site. May and June are now the top-performing months in the last five years. Visits were primarily driven by organic traffic and referrals from our social media channels.

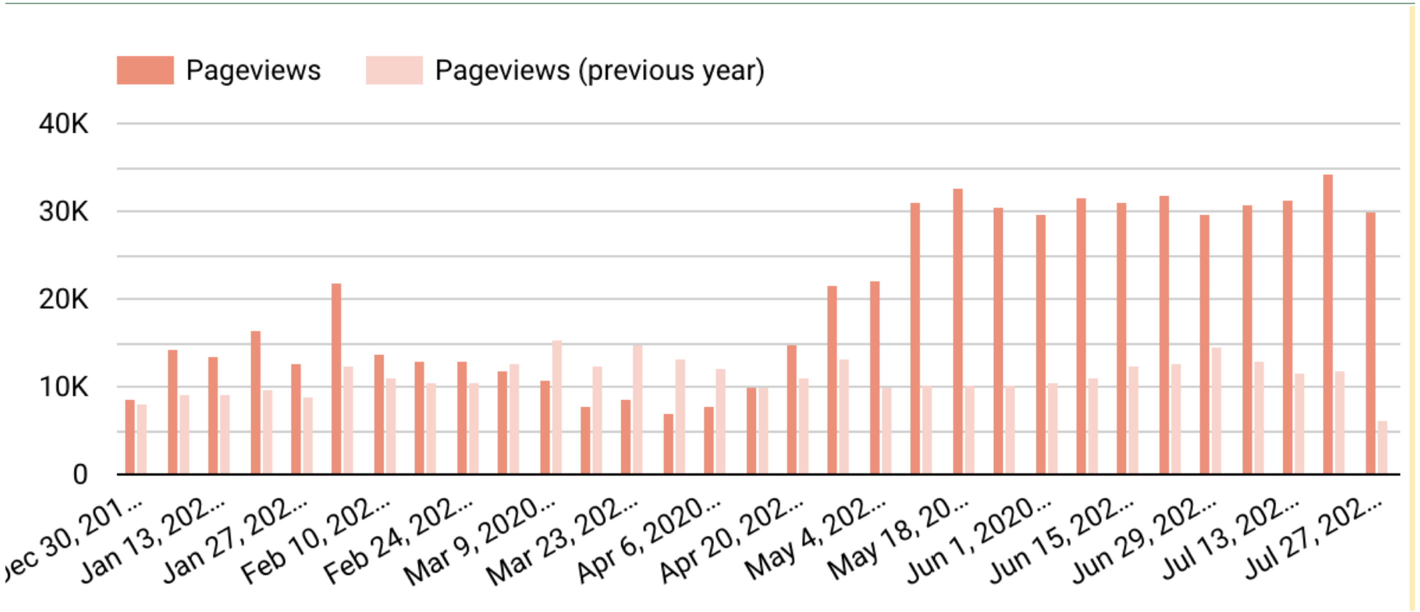


Source: Google Data Studio

WEBSITE: TRAFFIC

We're seeing significant YoY increases in traffic to the accommodations and travel guide pages. Partner referrals from business listings have also seen a sharp increase YoY. These are all strong indicators that travel planning is returning and that our efforts in SEO and content are paying off.

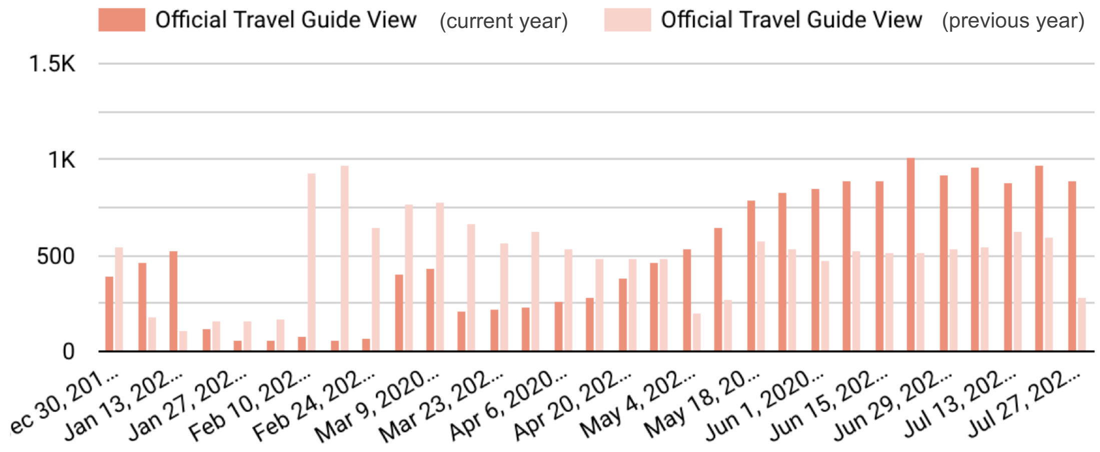
ExploreGeorgia.org: Accommodations Pageviews



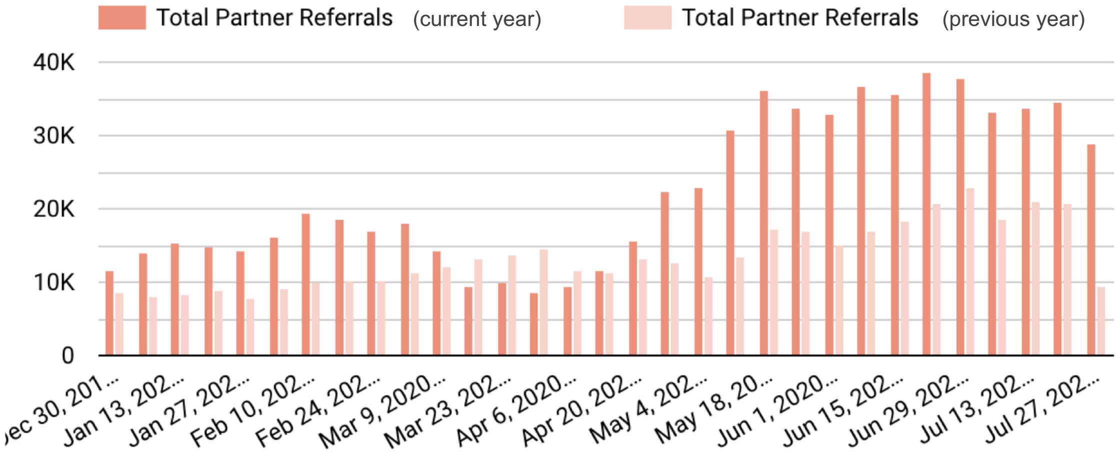
Source: Google Data Studio

WEBSITE: TRAFFIC

ExploreGeorgia.org: Travel Guide Views



ExploreGeorgia.org: Partner Referrals



Source: Google Data Studio

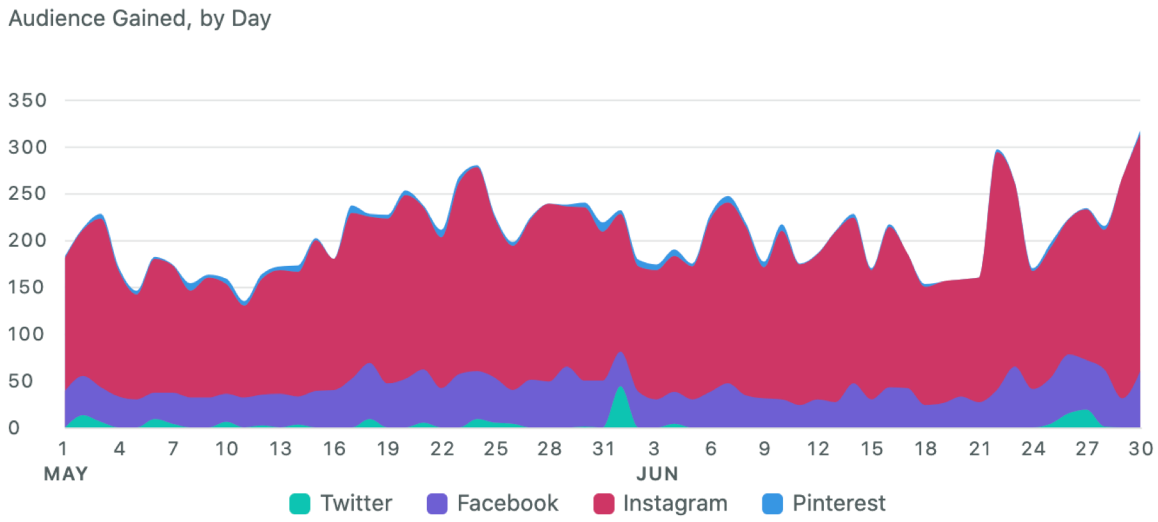
SOCIAL MEDIA

During May and June, Explore Georgia social media channels continued to gain followers, with the majority of the growth coming from Instagram and Pinterest.

Despite being dark for large portions of May and June, engagement rates continued to outperform benchmarks. Being sensitive to travel concerns, the primary content shared was centered on travel inspiration with no strong CTA, along with some community polling.

Social media continues to be a valuable traffic driver for ExploreGeorgia.org, with Pinterest increasingly driving a highly qualified audience.

Explore Georgia Social Media Audience Growth (MoM)



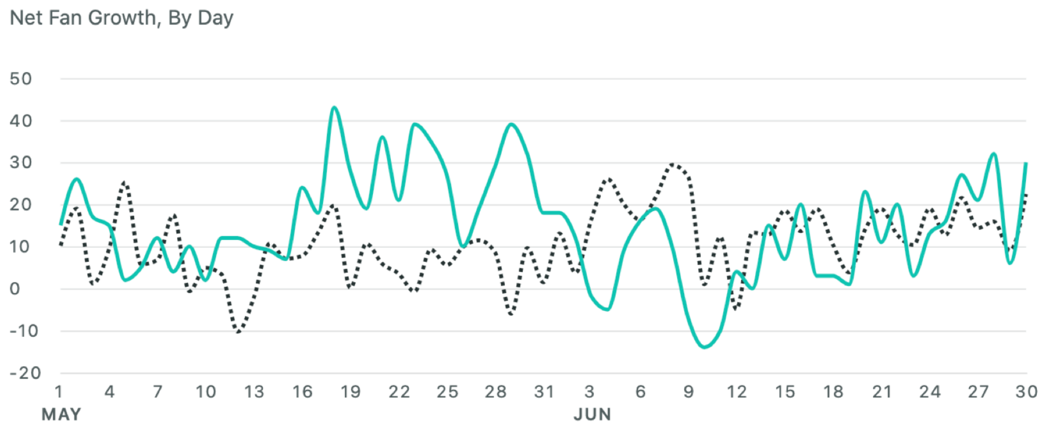
Audience Metrics	Totals	% Change
Total Audience	814,983	↗0.8%
Total Net Audience Growth	6,842	↗12.5%

Source: Sprout Social

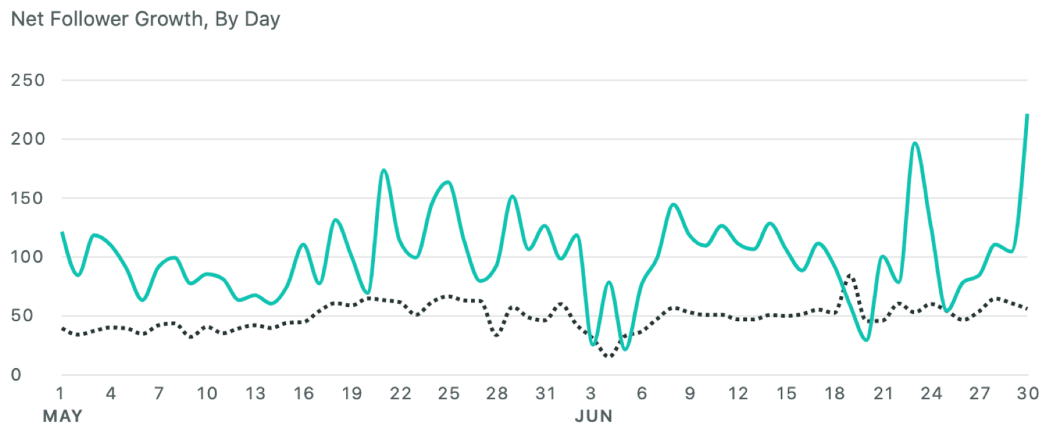
SOCIAL MEDIA

Looking at our competitive set of state DMOs in the Southeast, Explore Georgia continues to lead the pack in terms of gaining new followers and driving engagement during this crisis. On Instagram, Explore Georgia is the second most followed state DMO in the southeast (behind Florida), and number seven in the nation. On Facebook, Florida has twice the followers, but Explore Georgia experiences nearly twice the post engagement.

Facebook



Instagram



Explore Georgia

Competitor Average

Source: Sprout Social

EXPLORE GEORGIA

QUESTIONS?

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