

EXPLORE
GEORGIA

COVID-19 DASHBOARD

July/August 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

July/August 2020

- Employment, travel spending, and visitation conditions in Georgia all continued on upward, yet flattening, trajectories, as the modest recovery wave initiated in May and June began to plateau in many regards.
- During the pandemic, travelers have experienced extreme reactions to changes in outbreak circumstances, but then gradually acclimated to the “new normal.” At the time of this dashboard’s publication, the sentiment pendulum has swung yet again: American travelers are feeling the safest they have in many respects, which is translating into much-improved optimism about travel and openness to travel inspiration.
- Still, the majority of travelers remain concerned about contracting or spreading COVID-19.
- Visitor behavior on our owned channels continues to show that visitors are interested in, and engaging with, our travel content.
- The website continues to outperform YoY averages and has recovered far faster than other, competitive state DMOs’ sites.
- In August, we launched the “Explore Your Georgia” campaign with the goal of encouraging residents to stay in-state when they travel. The campaign was a four week test, and if deemed successful it will be continued into the fall.

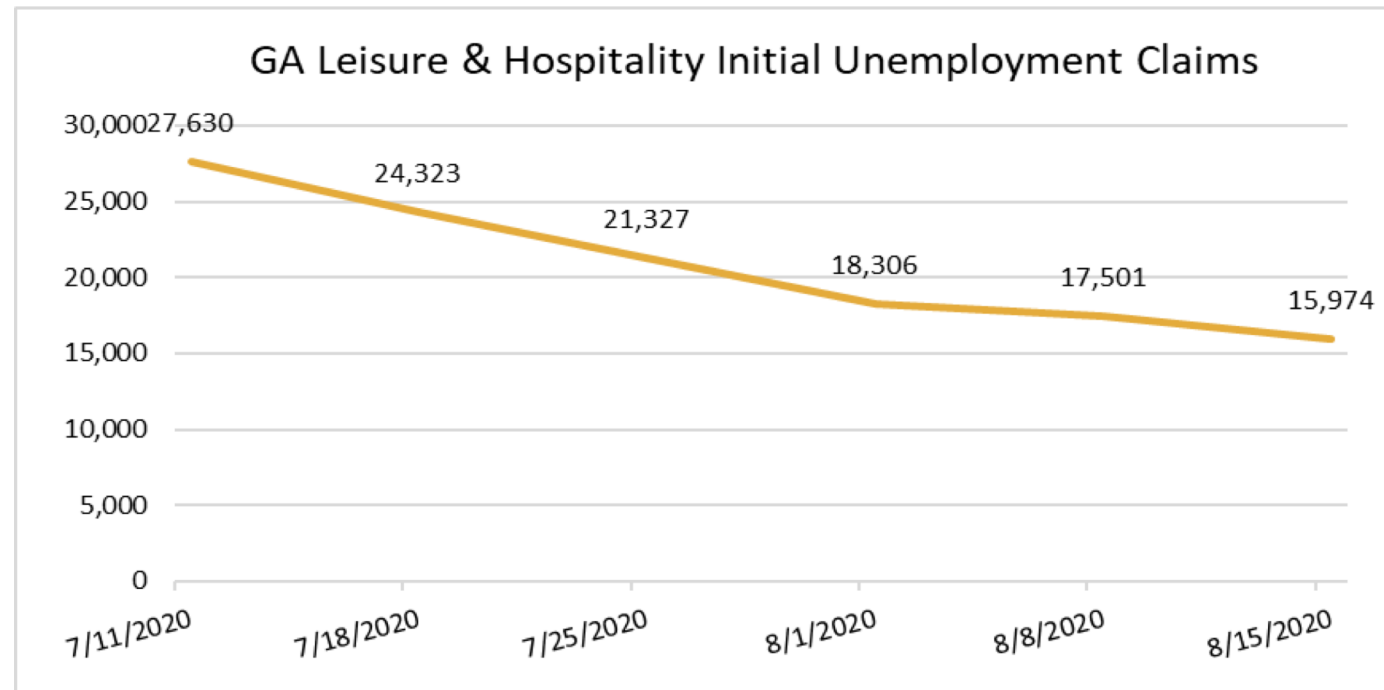
GEORGIA'S TOURISM INDUSTRY: CURRENT STATUS

EXPLORE
GEORGIA

GEORGIA UNEMPLOYMENT: JULY & AUGUST

The unemployment rate in Georgia remained at 7.6% in July. In the month of July, total Non-Farm Employment grew by 43,800 jobs, 16,500 (38%) of which were Leisure & Hospitality jobs (the “Accommodations and Food Services” and “Arts, Entertainment and Recreation” sectors).

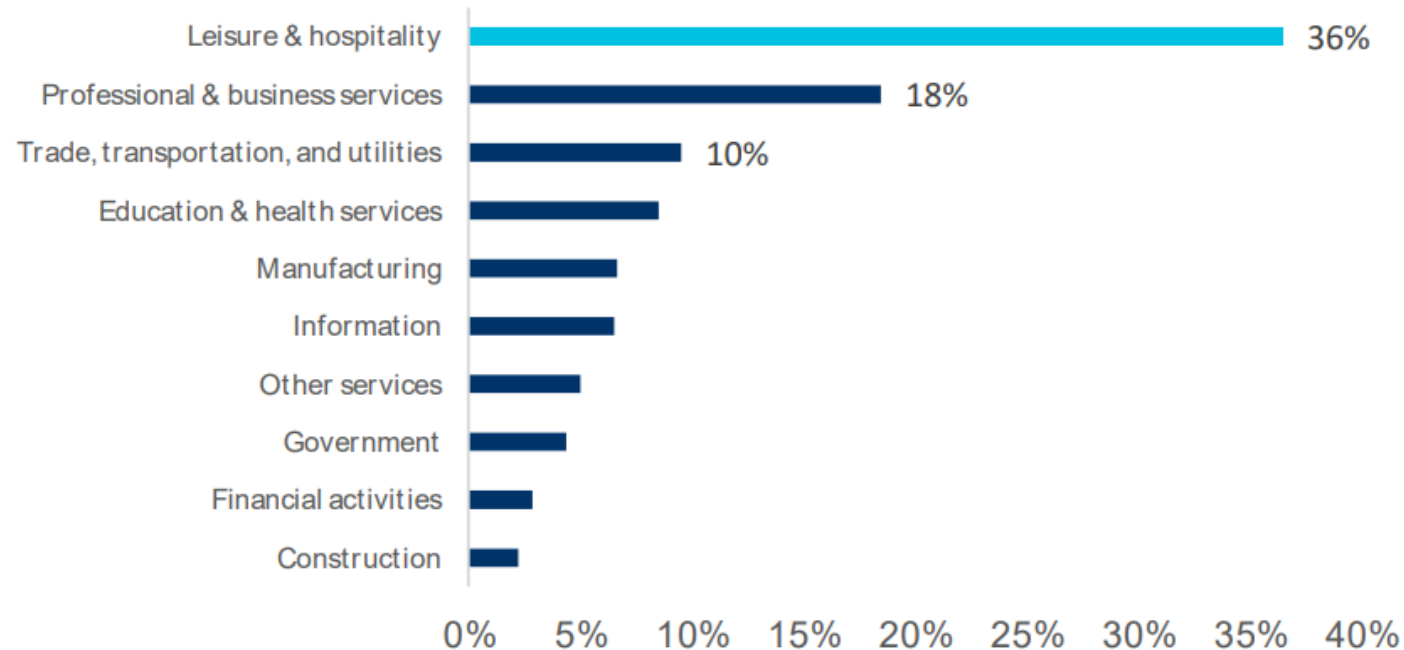
Weekly Leisure and Hospitality Initial Unemployment Claim filings are still falling, but continue to represent between 20% and 30% of all weekly IUC filings, and the decline has been leveling out.



GEORGIA UNEMPLOYMENT: PANDEMIC IN REVIEW

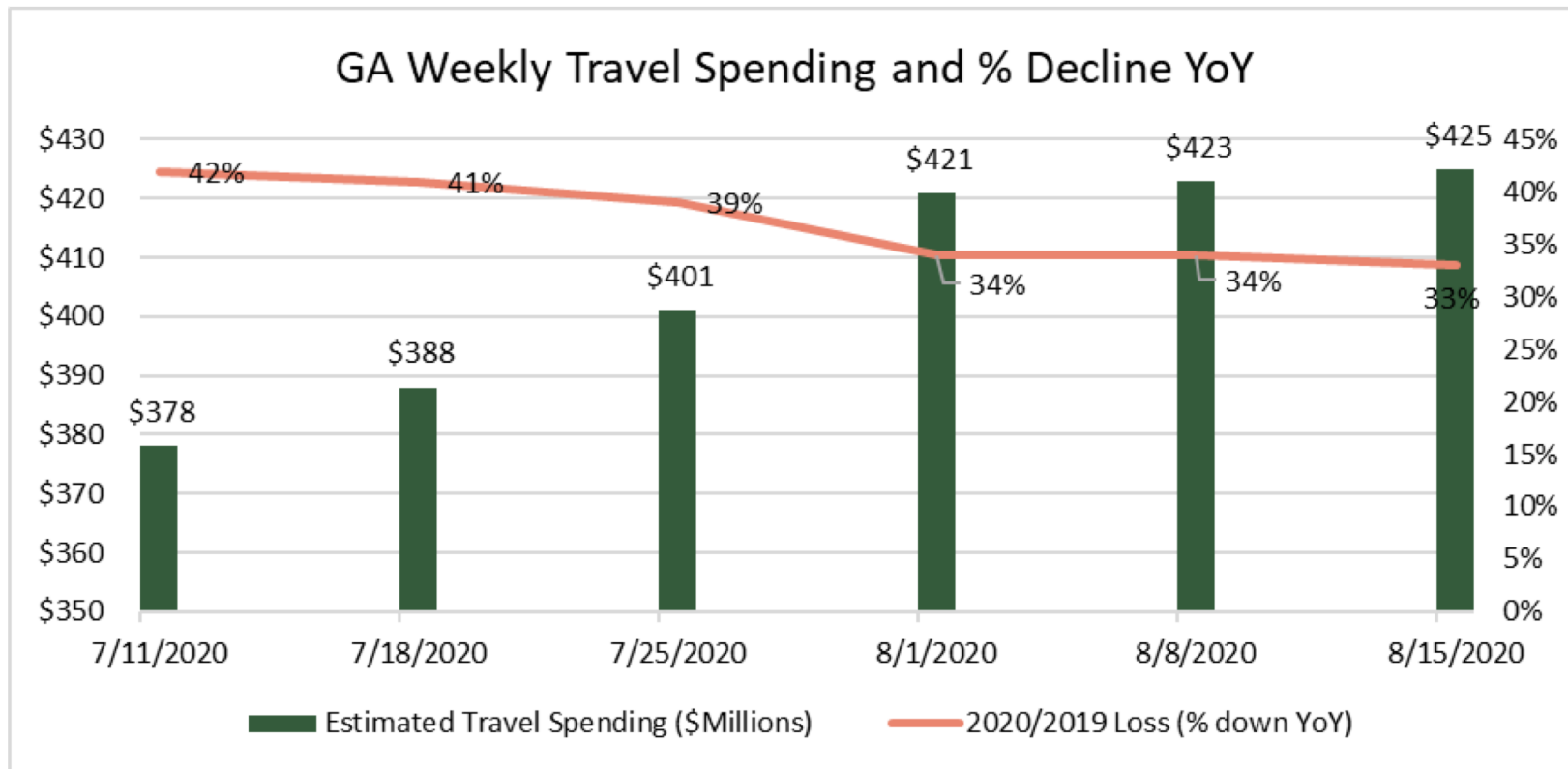
In March and April, 216,000 Leisure & Hospitality jobs were lost (42.1% of the 513,200 Non-Farm jobs lost during this period). May, June, and July saw 129,600 Leisure & Hospitality jobs regained, leaving the sector 86,400 jobs short of February employment levels. These 86,400 jobs represent 36.5% of remaining Non-Farm employment losses: more than any other sector by far.

Georgia employment share of employment loss
% of all jobs lost since February



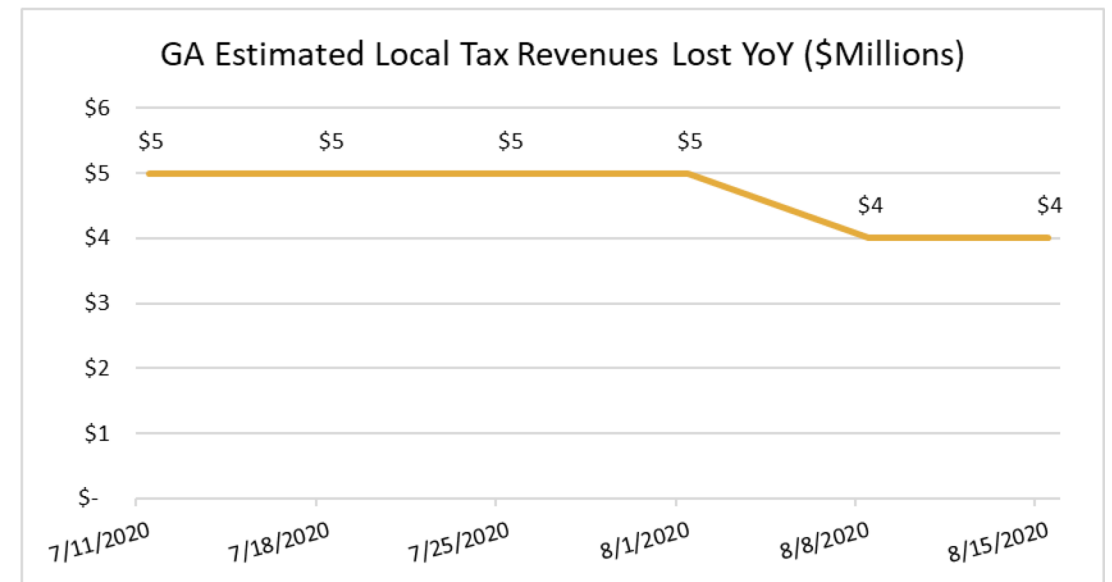
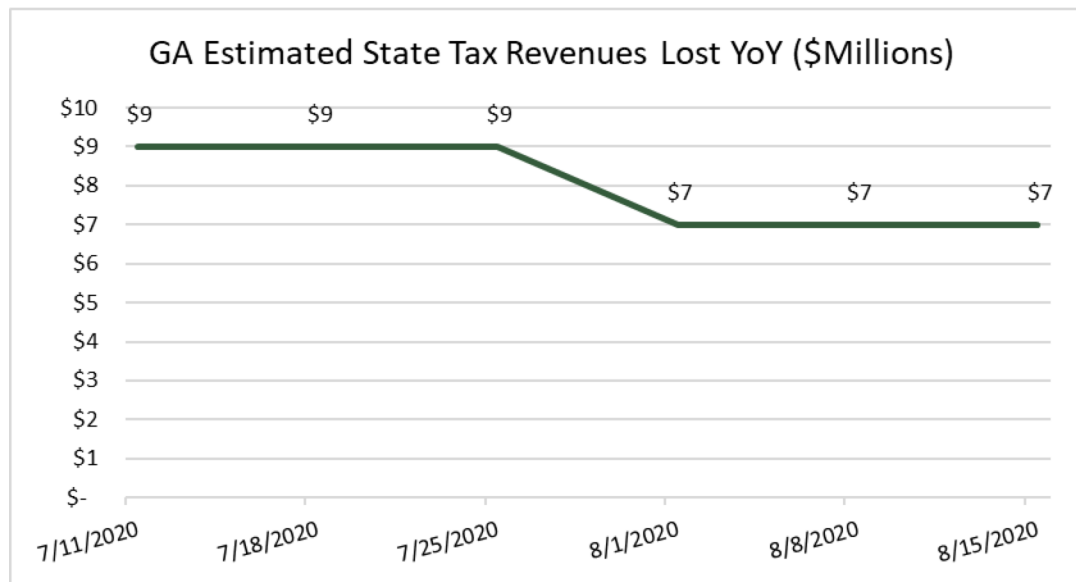
GEORGIA TRAVEL SPENDING: JULY & AUGUST

From the week-ending July 11 through the week-ending August 15, total estimated travel spending in Georgia was down \$1.44 billion in 2020 compared to 2019, bringing total YoY losses to \$8.4 billion. Following the boost of the July 4th weekend, travel spending growth in Georgia slowed, but weekly expenditures remained 70%-83% higher than the national average (including Washington, D.C. and Puerto Rico).



GEORGIA TAX REVENUES: JULY & AUGUST

From the week-ending July 11 through the week-ending August 15, total estimated travel-generated state and local tax revenues in Georgia were down \$76 million in 2020 compared to 2019, bringing total YoY losses to \$445 million. As expenditure growth has been slowing, weekly tax revenue losses have continued to improve at a slower pace as well.



GEORGIA ECONOMIC IMPACT FORECAST

A forecast report from Tourism Economics providing Upside, Baseline, and Downside COVID-19 impact scenarios for the state of Georgia anticipates 2020 losses of \$10.1-\$11.6 billion in visitor spending; 62,537-71,245 in jobs; and \$653-\$744 million in state and local tax revenues. The full report with monthly breakdowns, lodging impacts, recovery scenarios, and more [is available here](#).

Summary of COVID-19 related tourism losses in three scenarios

Dollar figures in millions

	2020	2021	2022
Upside			
Lost visitor spending, \$	\$10,144	\$4,231	\$2,116
Lost visitors spending, %	31%	13%	6%
Lost jobs	62,537	26,085	13,042
Room revenue	\$1,859	\$744	\$373
Baseline			
Lost visitor spending, \$	\$10,864	\$5,411	\$3,228
Lost visitors spending, %	33%	17%	10%
Lost jobs	66,974	33,359	19,899
Room revenue	\$1,921	\$952	\$567
Downside			
Lost visitor spending, \$	\$11,557	\$8,195	\$5,322
Lost visitors spending, %	35%	25%	16%
Lost jobs	71,245	50,523	32,811
Room revenue	\$1,975	\$1,440	\$934

Sources: Tourism Economics; STR; US Travel

Baseline Scenario COVID-19 related losses in Georgia

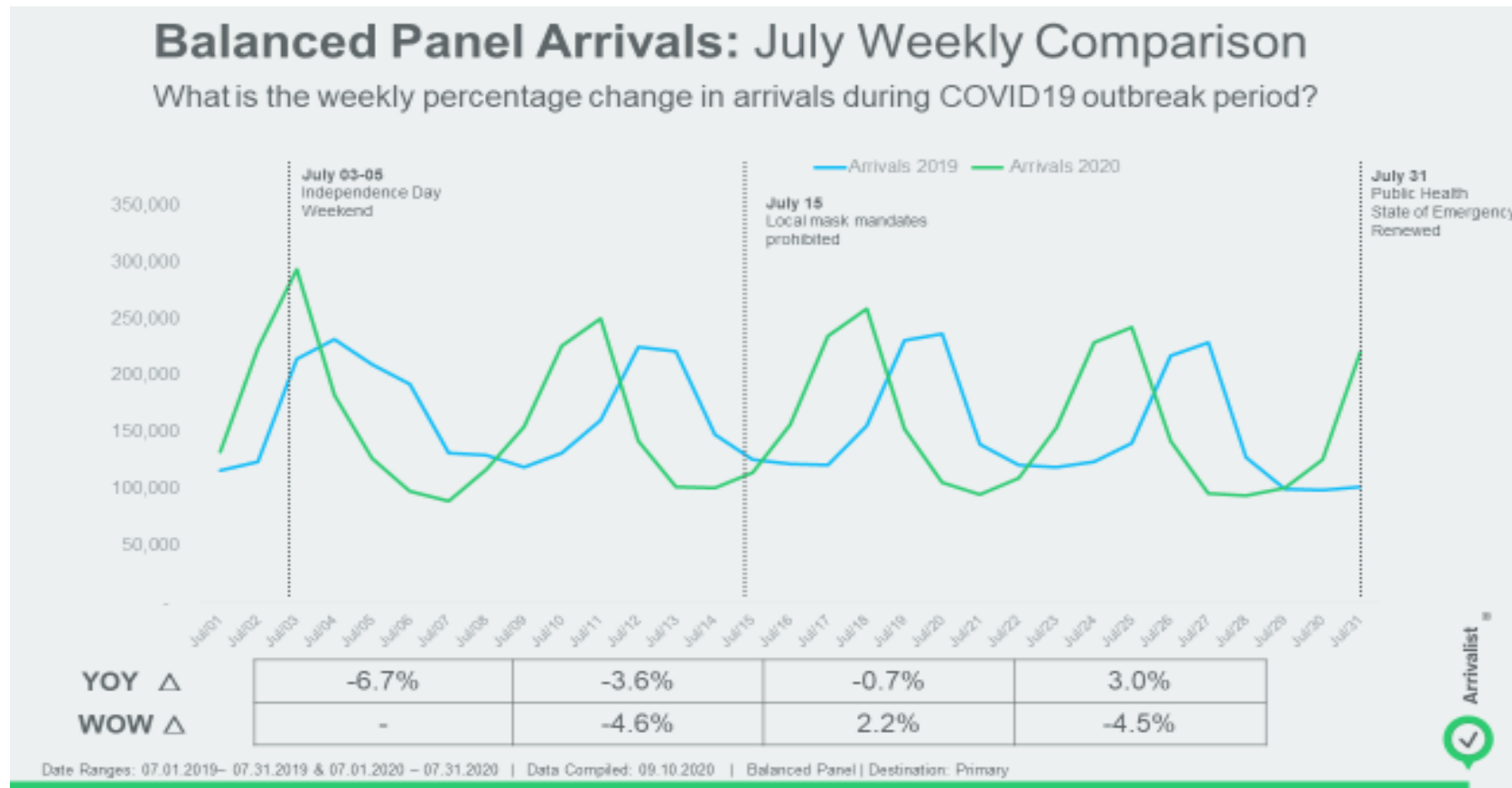
Dollar figures in millions, comparison to 2019 figures

	2020	2021	2022
Economic impacts			
Lost visitor spending, \$	\$10,864	\$5,411	\$3,228
Lost visitors spending, %	33%	17%	10%
Lost jobs	66,974	33,359	19,899
Lost wages	\$3,050	\$1,519	\$906
Lost state and local taxes	\$699	\$348	\$208
Hotel impacts			
Lost room demand (000's)	11,733	3,717	1,704
Lost room demand, %	26%	8%	4%
Lost room revenue, \$	\$1,921	\$952	\$567
Lost room revenue, %	40%	20%	12%

Sources: Tourism Economics; STR; US Travel

GEORGIA DOMESTIC VISITATION: JULY 2019 & 2020

In 2019, 10.3% of trips* to/within Georgia occurred in July. In 2020, despite climbing COVID-19 cases, strong Independence Day weekend performance, and continued demand for in-state summer travel options maintained total daily arrivals YoY.

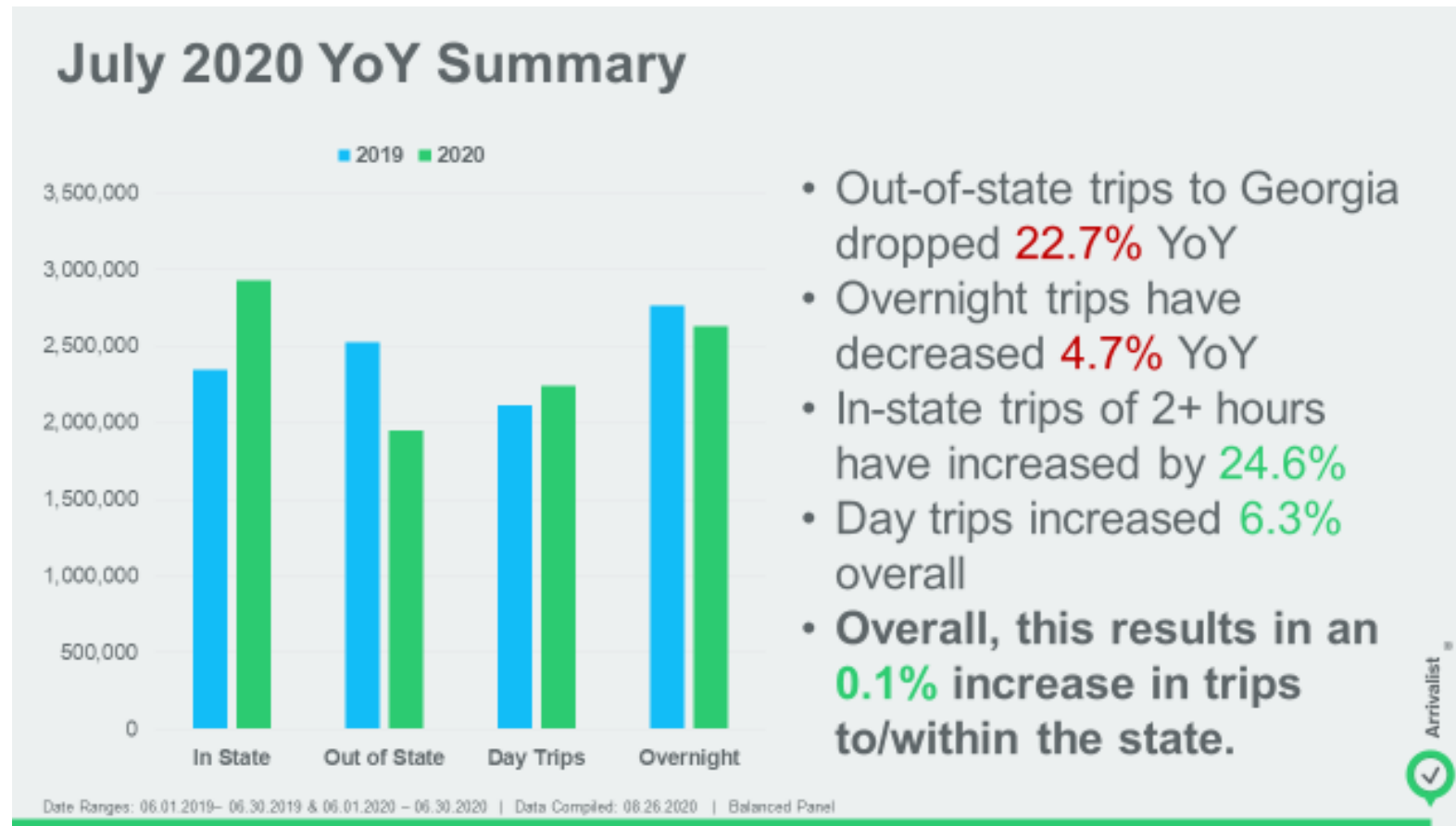


Source: Arrivalist

*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: JULY YOY

As a result of continued gains in the in-state and day trip segments, particularly over the Independence Day weekend, total trips* in July remained steady YoY. Out-of-state and overnight trips remained depressed YoY, however.

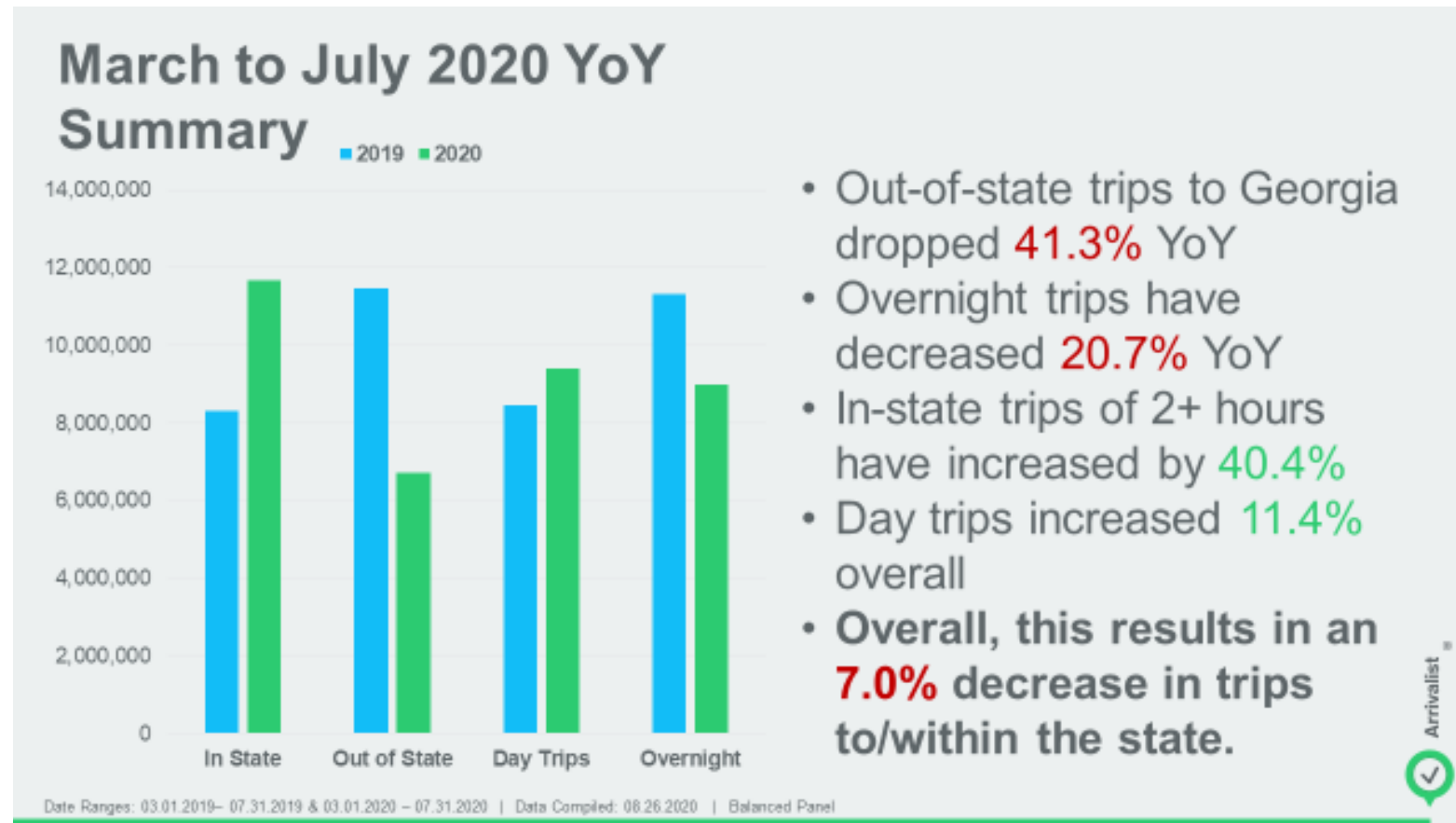


Source: Arrivalist

*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: PANDEMIC IN REVIEW

Since the beginning of the COVID-19 pandemic, total trips* to/within Georgia have fallen 7% YoY. A brief report with weekly comparisons of YoY in-state, out-of-state, day trip, and overnight arrival trends [is available here](#).



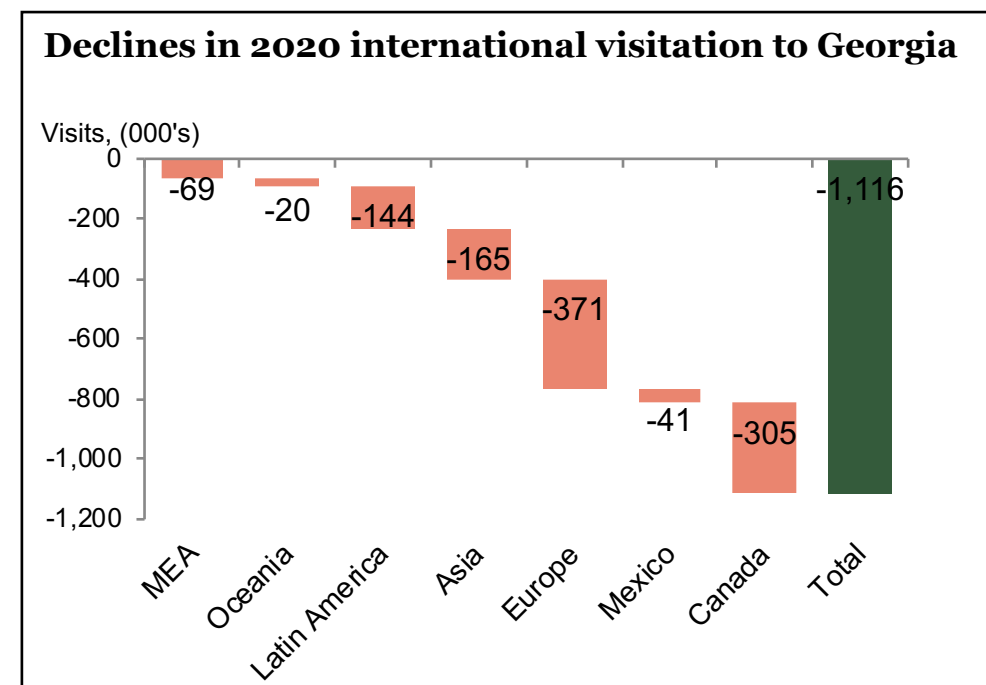
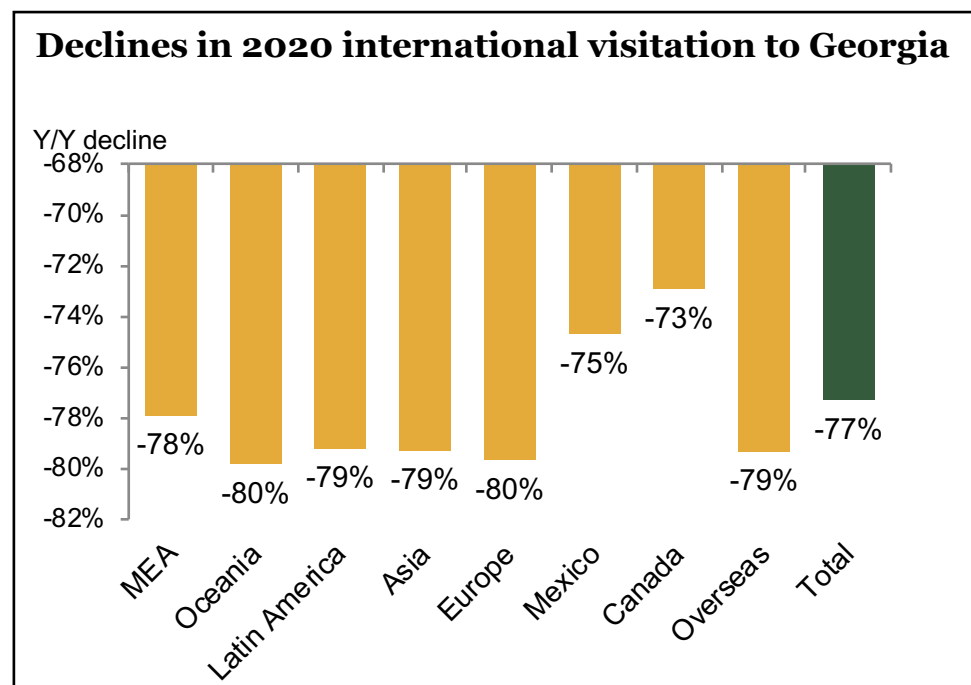
Source: Arrivalist

*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 77% decline (-1,116,000 arrivals) in total international visitation and a 78% decline (-\$1.61 billion) in total international spending compared to 2019.

A 79% decline (-769,000 arrivals) in Overseas visitation, a 73% decline (-305,000 arrivals) in Canadian visitation, and a 75% decline (-41,000 arrivals) in Mexican visitation are anticipated.



GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

In July, Georgia Hotel Rooms Sold and RevPAR were down 26% and 42%, respectively, compared to 2019 (a marked improvement over Q2's figures). Georgia continues to outperform the national average in terms of YoY Occupancy, Rooms Sold, Revenue, ADR, and RevPAR, as it has since May.

Also in July, passenger traffic was down 77% compared to 2019 at Hartsfield-Jackson International Airport, up more than 18 points since April.

	July 2020	Jan-July 2020 YTD
Hotel RevPAR YoY	-42.0%	-44.1%
Hotel Rooms Sold YoY	-25.5%	-30.6%
Domestic Passenger Traffic YoY	-74.3%	-58.5%
International Passenger Traffic YoY	-92.9%	-68.9%
Total Passenger Traffic YoY	-76.6%	-59.8%

GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

Aggregate Search and Booking activity for Georgia flights and hotels from both domestic and international markets has been on an overall upward trend since the week of 7/6/20. Most recently, while Bookings remain down ~70% YoY, Searches are down only 59% YoY, a positive indicator travel planning activity is increasing as we head into the Fall.



GEORGIA'S TOURISM INDUSTRY: CURRENT INDICATORS

EXPLORE
GEORGIA

CHECKING THE PULSE: TRAVELER SENTIMENT

- Nearly half of American travelers say their summer trip made them more confident about being able to travel safely.
- Perceptions about personal travel-readiness and the safety of travel activities are the best they have been during the pandemic.
- Opposition to having tourists in one's community is as low as it has been since April, and more people feel confident travelling outside their communities than at any point since May.
- Pessimism overall is in retreat:
 - Just 39% of Americans now think the pandemic will get worse in the next month (well below the mid-60s spike seen in early July), and 23% think it will get better.
 - Strong concerns about COVID-19's impact on health and financial safety are approaching a six-month low, and the likelihood COVID-19 will impact people's decision to travel is at the lowest point since early March.
- The road trip is likely to remain king for the next six months, as travelers report being more than twice as likely to travel by personal car than by domestic flight.
- While business travel is not expected to return in earnest until Q2 2021, over half of business travelers anticipate they may take a domestic business trip within the next six months.

CHECKING THE PULSE: TRAVELER BEHAVIOR

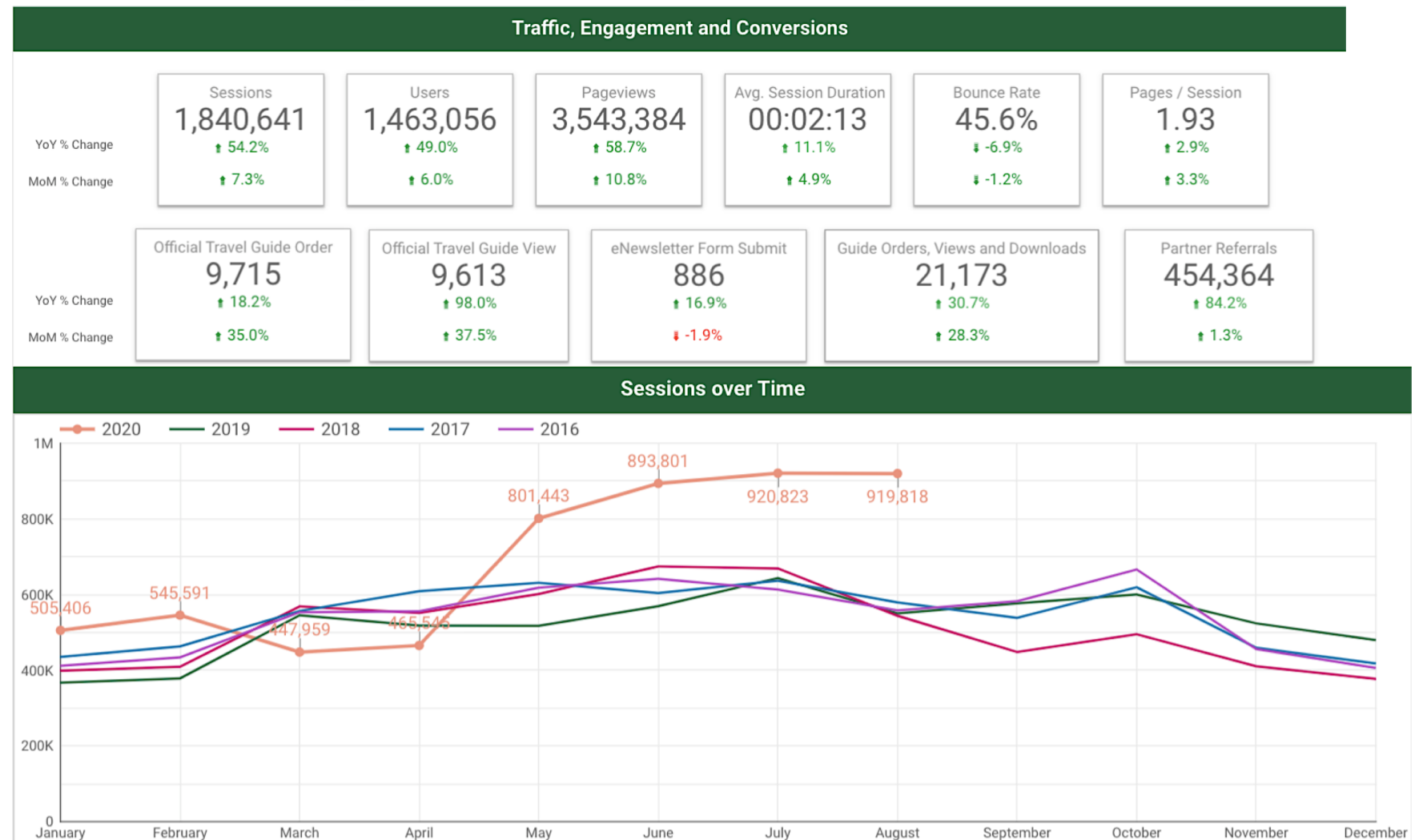
- 35% of Americans took a leisure trip this summer, and another 20% took a “staycation.”
 - Additionally, 41% of trips taken in July were vacations – up 10 points over June – greater than the visiting friends and family segment for the first time in 2020. 39% of trips taken in August were vacations.
 - The most visited destinations this summer were Beaches, Small and Rural Towns, and State and Local Parks.
 - For those who took staycations, 2/3 reported participating in at least one travel activity, including day trips to area attractions (28%), eating at restaurants (27%), and local overnight trips (10%).
 - Over 2/3 researched their destination’s COVID-19 rules and regulations before embarking.
 - More than 80% of summer leisure travelers stayed overnight in their destinations, not only with friends and relatives, but also in a variety of paid accommodation types, with hotels in particular picking up steam in July.
 - However, more than half of travelers decreased their total summer trip spending as a result of the pandemic.

CHECKING THE PULSE: TRAVELER BEHAVIOR

- The most confident travelers are younger people and those who live in the South.
 - The channels people are most receptive to currently are search engine marketing, social media and streaming services (particularly among the younger generations), email, and general online content (blogs and articles).
 - They are least receptive to digital influencers and printed newspaper travel sections.
- 3/4 of American travelers report having tentative travel plans right now, with over 60% expecting to travel within the next six months, and 37% intending to travel this fall.
 - October and November are the most popular months for all tentative trip plans this year, with October currently the most popular month for anticipated road trips. On average, travelers expect to drive ~290 miles from home.
 - Overall, fall travel is likely to remain focused on outdoor adventures and short getaways, with spur-of-the-moment bookings probable as trip planning windows remain shortened.
- For those whose future trips have been altered by COVID-19, reductions, rescheduling, and postponements are now much more likely than outright cancellations of plans, a trend which has been holding for the last eight weeks.
 - Swaps from international to domestic trips have also been more likely in the last eight weeks.

WEBSITE

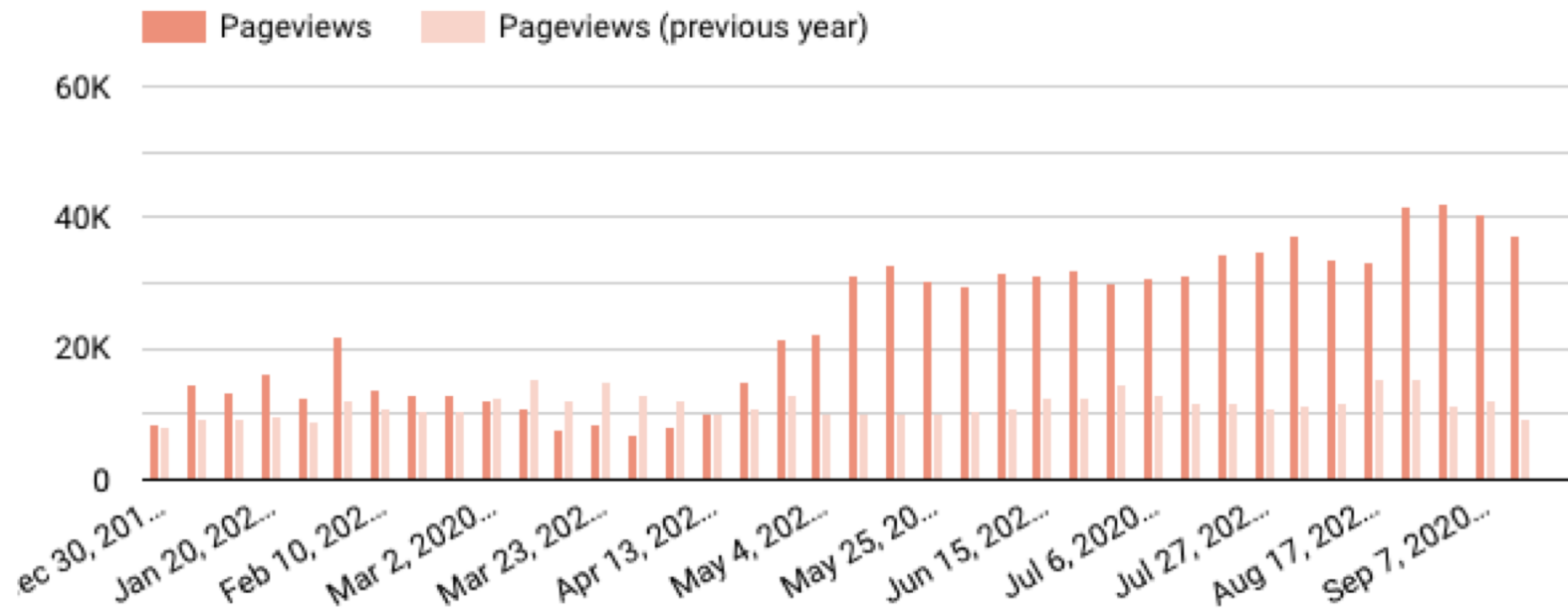
For the months of July and August, we continued to see record-breaking traffic on the site. Sessions were up more than 54% YoY, and Partner Referrals were up more than 84% YoY. Visits were primarily driven by organic traffic and referrals from our social media channels.



WEBSITE: TRAFFIC

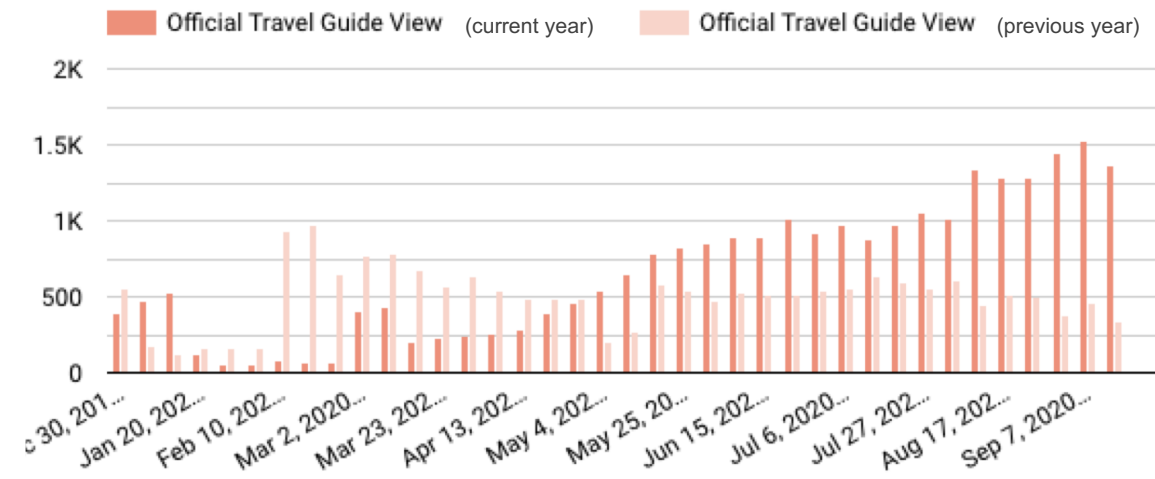
In July and August, we continued to see significant YoY increases in traffic to the accommodations and travel guide pages. Partner referrals from business listings have also seen a sharp increase YoY. These are all strong indicators that travel planning is returning and our efforts in SEO and content are paying off.

ExploreGeorgia.org: Accommodations Pageviews

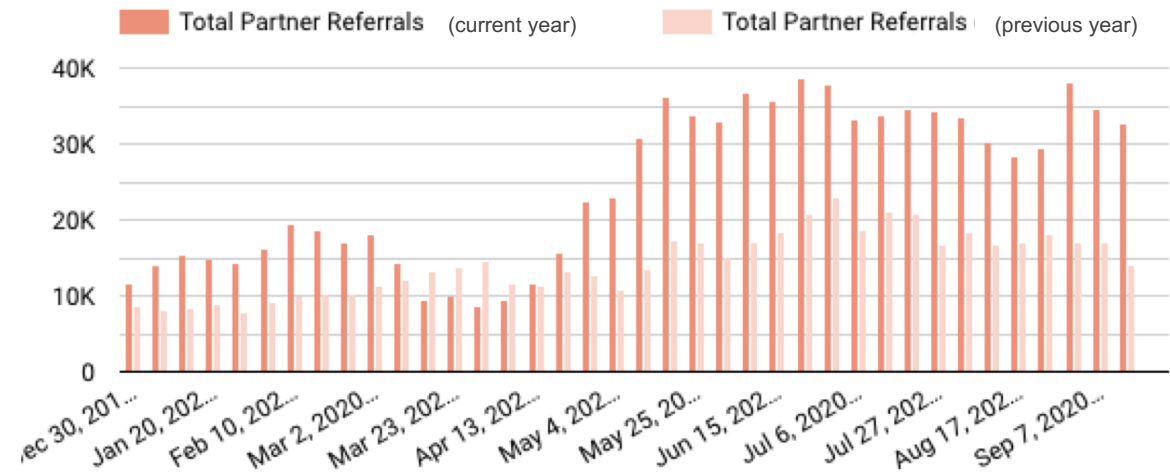


WEBSITE: TRAFFIC

ExploreGeorgia.org: Travel Guide Views



ExploreGeorgia.org: Partner Referrals



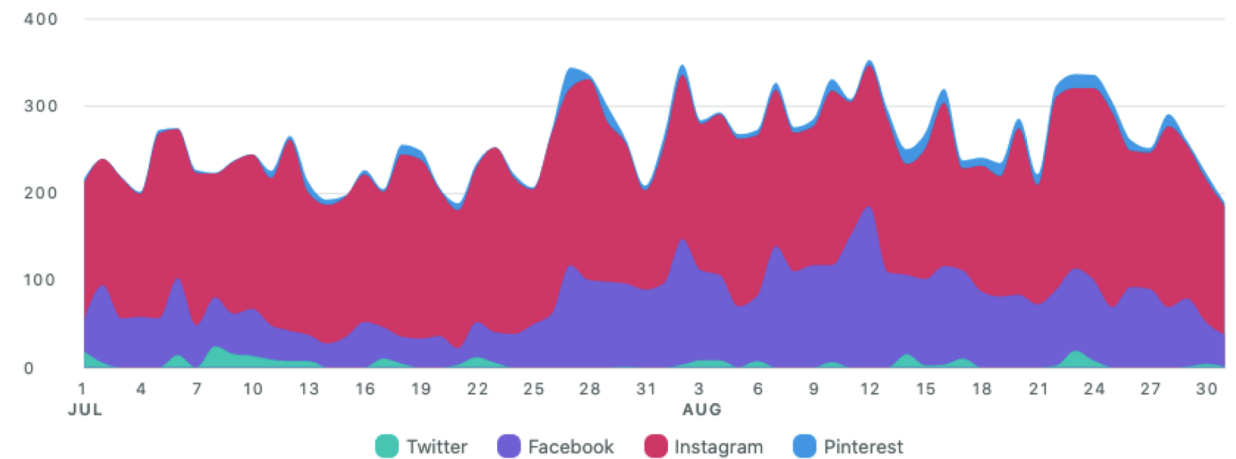
SOCIAL MEDIA

During July and August, Explore Georgia social media channels saw a significant increase in followers, with the majority of the growth coming from Facebook and Pinterest.

Despite being dark for large portions of May and June, engagement rates continued to outperform benchmarks. Tying into the Explore Your Georgia paid advertising campaign, posts encouraged travelers to consider trips to the state's coast, mountains, small towns, and state/national parks.

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

Audience Gained ⓘ

Totals % Change

16,115 ↗ 26.3%

SOCIAL MEDIA

During July and August, content resonating the most with fans was related to mountain adventures, trips to the coast, and outdoor rec ideas.

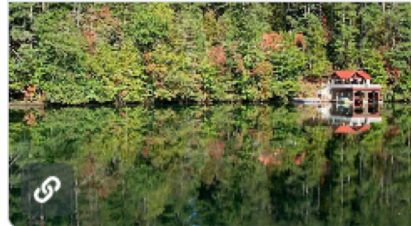
Followers are most inspired by beautiful pictures of sunsets, mountain ranges, and lakes.

Our content and related giveaway about the seven natural wonders also performed very well.



How many have you been to?

4 Secret Mountain Lakes and Towns



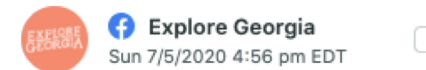
Total Engagements 26,930



Sunrises on Blood Mountain are worth the early morning alarm. 🌄📸
@chrisgreerphotography



Total Engagements 10,573



Prepare to be awestruck by the unique features of Georgia's landscape at these waterfalls, canyons, swamps, springs

Save Pins at Georgia's 7 Natural Wonders



Total Engagements 12,371



🎁 GIVEAWAY: {CLOSED} Radium Springs in one of Georgia's 7 Natural Wonders. Can you name the other 6? We will pick!



Total Engagements 7,626



One of our favorite photos from Driftwood Beach! 🌅 Find our list of the most unspoiled beaches on the Georgia coast.



Total Engagements 12,110



What's your favorite lake in North Georgia? Link in bio for 4 secret mountain lakes and towns you'll love to visit.



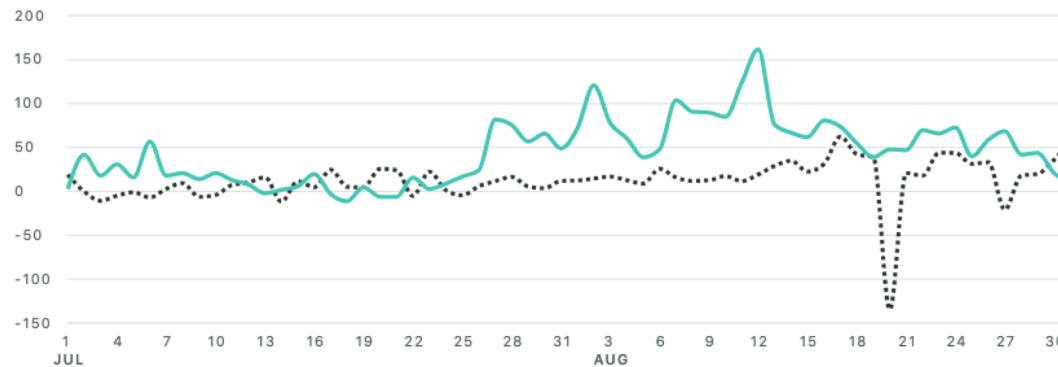
Total Engagements 6,394

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

Net Fan Growth, By Day



- Explore Georgia
- Competitor Average

Instagram

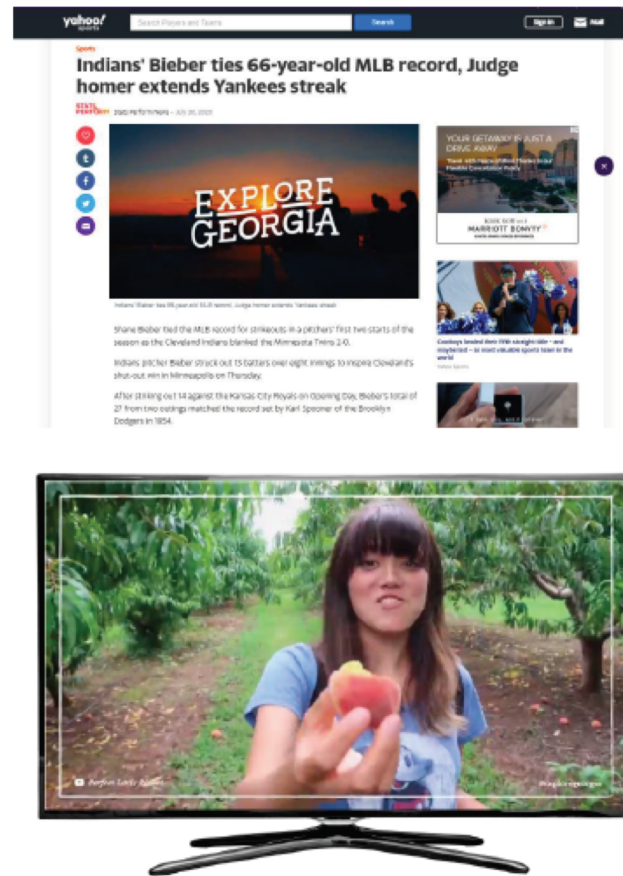
Net Follower Growth, By Day



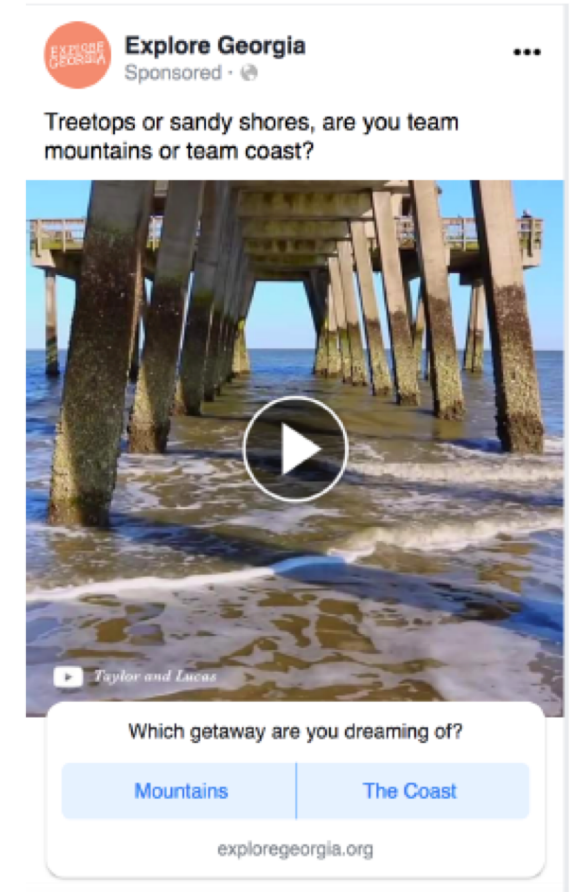
“Explore Your Georgia” Campaign

In August, we launched “Explore Your Georgia,” an integrated marketing campaign targeted to residents of Georgia. The campaign’s goal was to capture Georgians who are actively planning travel and inspire them to stay in-state for their trips. The campaign was a test to evaluate the effectiveness of travel advertising and the receptiveness of the audience. While we’re not in recovery – and that may be a long way off – research shows us Georgians are traveling, taking trips up to 300 miles from their homes. The campaign was 100% digital, allowing us to quickly pivot to respond to evolving traveler sentiment. The campaign also was carried through new landing pages on ExploreGeorgia.org (ExploreGeorgia.org/escape), email, and organic social.

CTV/Pre-Roll Video Ad

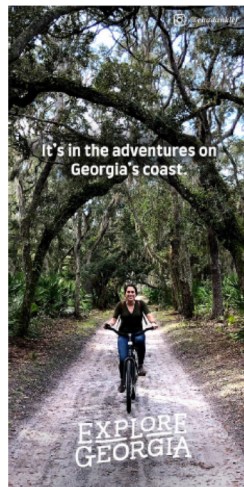
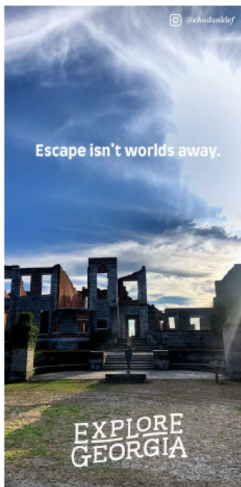
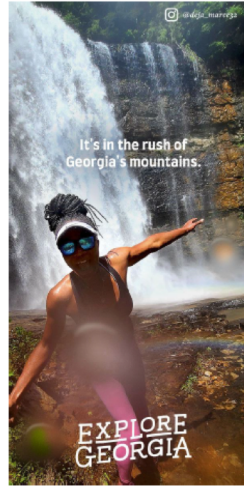
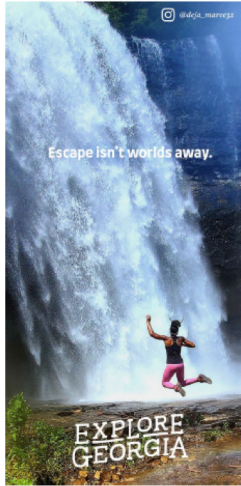


Facebook Poll Ad

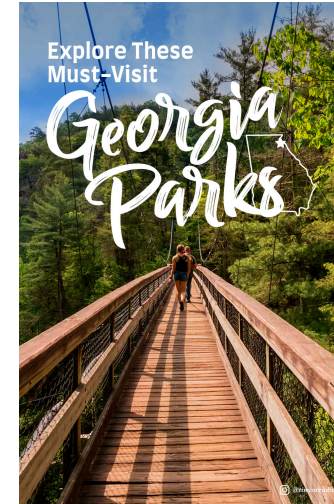


“Explore Your Georgia” Campaign

Digital Display Ads



Pinterest Ads



EXPLORE GEORGIA

QUESTIONS?

Ashley Barfield, Ph.D
Director of Research
404-327-1771
abarfield@georgia.org

Meggan Hood
Director of Brand Strategy
404-987-2092
mhood@georgia.org