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
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.

Source: Georgia Department of Labor; Tourism Economics
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).

Source: Tourism Economics
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.
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

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2020 (in millions)</th>
<th>2021 (in millions)</th>
<th>2022 (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Upside</strong></td>
<td>$10,144</td>
<td>$4,231</td>
<td>$2,116</td>
</tr>
<tr>
<td>Lost visitor spending, $</td>
<td>31%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Lost visitors spending, %</td>
<td>62,537</td>
<td>26,085</td>
<td>13,042</td>
</tr>
<tr>
<td>Room revenue</td>
<td>$1,859</td>
<td>$744</td>
<td>$373</td>
</tr>
<tr>
<td><strong>Baseline</strong></td>
<td>$10,864</td>
<td>$5,410</td>
<td>$3,228</td>
</tr>
<tr>
<td>Lost visitor spending, $</td>
<td>33%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Lost visitors spending, %</td>
<td>66,974</td>
<td>33,359</td>
<td>19,899</td>
</tr>
<tr>
<td>Room revenue</td>
<td>$1,921</td>
<td>$952</td>
<td>$567</td>
</tr>
<tr>
<td><strong>Downside</strong></td>
<td>$11,557</td>
<td>$8,195</td>
<td>$5,322</td>
</tr>
<tr>
<td>Lost visitor spending, $</td>
<td>35%</td>
<td>25%</td>
<td>16%</td>
</tr>
<tr>
<td>Lost visitors spending, %</td>
<td>71,245</td>
<td>50,523</td>
<td>32,811</td>
</tr>
<tr>
<td>Room revenue</td>
<td>$1,975</td>
<td>$1,440</td>
<td>$934</td>
</tr>
</tbody>
</table>

### Baseline Scenario COVID-19 related losses in Georgia

<table>
<thead>
<tr>
<th></th>
<th>2020 (in millions)</th>
<th>2021 (in millions)</th>
<th>2022 (in millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Economic impacts</strong></td>
<td>$10,864</td>
<td>$5,411</td>
<td>$3,228</td>
</tr>
<tr>
<td>Lost visitor spending, $</td>
<td>33%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Lost visitors spending, %</td>
<td>66,974</td>
<td>33,359</td>
<td>19,899</td>
</tr>
<tr>
<td>Lost jobs</td>
<td>$3,050</td>
<td>$1,519</td>
<td>$906</td>
</tr>
<tr>
<td>Lost wages</td>
<td>$699</td>
<td>$348</td>
<td>$208</td>
</tr>
<tr>
<td>Lost state and local taxes</td>
<td>$921</td>
<td>$952</td>
<td>$567</td>
</tr>
<tr>
<td><strong>Hotel impacts</strong></td>
<td>$11,557</td>
<td>$8,195</td>
<td>$5,322</td>
</tr>
<tr>
<td>Lost room demand (000's)</td>
<td>26%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Lost room demand, %</td>
<td>71,245</td>
<td>50,523</td>
<td>32,811</td>
</tr>
<tr>
<td>Lost room revenue, $</td>
<td>40%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Lost room revenue, %</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Sources: Tourism Economics, STR, US Travel*
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.

*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.
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.

- Out-of-state trips to Georgia dropped **22.7%** YoY
- Overnight trips have decreased **4.7%** YoY
- In-state trips of 2+ hours have increased by **24.6%**
- Day trips increased **6.3%** overall
- Overall, this results in an **0.1%** increase in trips to/within the state.

*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.
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.

![March to July 2020 YoY Summary](chart)

- Out-of-state trips to Georgia dropped **41.3%** YoY
- Overnight trips have decreased **20.7%** YoY
- In-state trips of 2+ hours have increased by **40.4%**
- Day trips increased **11.4%** overall
- Overall, this results in an **7.0%** decrease in trips to/within the state.

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 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.

<table>
<thead>
<tr>
<th></th>
<th>July 2020</th>
<th>Jan-July 2020 YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel RevPAR YoY</td>
<td>-42.0%</td>
<td>-44.1%</td>
</tr>
<tr>
<td>Hotel Rooms Sold YoY</td>
<td>-25.5%</td>
<td>-30.6%</td>
</tr>
<tr>
<td>Domestic Passenger Traffic YoY</td>
<td>-74.3%</td>
<td>-58.5%</td>
</tr>
<tr>
<td>International Passenger Traffic YoY</td>
<td>-92.9%</td>
<td>-68.9%</td>
</tr>
<tr>
<td>Total Passenger Traffic YoY</td>
<td>-76.6%</td>
<td>-59.8%</td>
</tr>
</tbody>
</table>

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

Source: ADARA
GEORGIA’S TOURISM INDUSTRY: CURRENT INDICATORS
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.

Sources: Destination Analysts; Longwoods International & Miles Partnership; MMGY Global; Skift Research; TripAdvisor
• 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.

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

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

Source: Google Analytics
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

Source: Google Analytics
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.

Source: Sprout Social
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.

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.

Source: Sprout Social
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.
“Explore Your Georgia” Campaign

Digital Display Ads

Pinterest Ads
QUESTIONS?

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