EXPLORE GEORGIA®

COVID-19 DASHBOARD

August/September 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

August/September 2020

- Employment and travel spending see-sawed up and down while visitation remained largely stable in Georgia in August and September, punctuated by the Labor Day weekend boost.
- Travel spirits ebb and flow with the waves of the pandemic. At the time of this dashboard's publication, the U.S. is setting new records for COVID-19 infections. This has naturally translated into increased anxieties across the board for American travelers and to uncertainty about the upcoming holiday travel season.
- Yet people are continuing to plan for future vacations, and are more knowledgeable about COVID-19 and confident about how to travel safely. Between 2/3 and 3/4 of American travelers have at least tentative trip plans in the next six months; over half still consider themselves to be in a "travel-ready" state of mind.
- 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 metrics and has recovered far faster than other, competitive state DMOs' sites.
- Engagement in our social channels and paid media continues to indicate there is a set of travelers who are interested in travel and are actively planning for future trips.

GEORGIA'S TOURISM INDUSTRY: CURRENT STATUS

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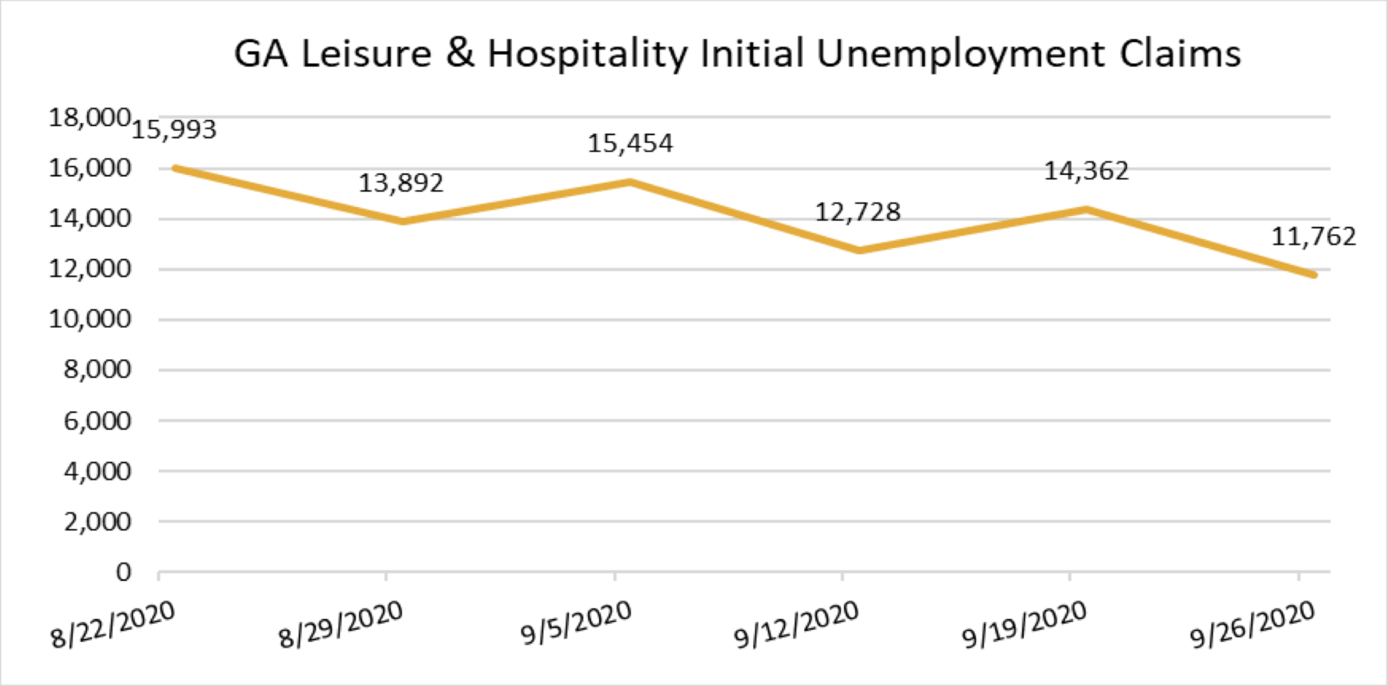
GEORGIA UNEMPLOYMENT: AUGUST & SEPTEMBER

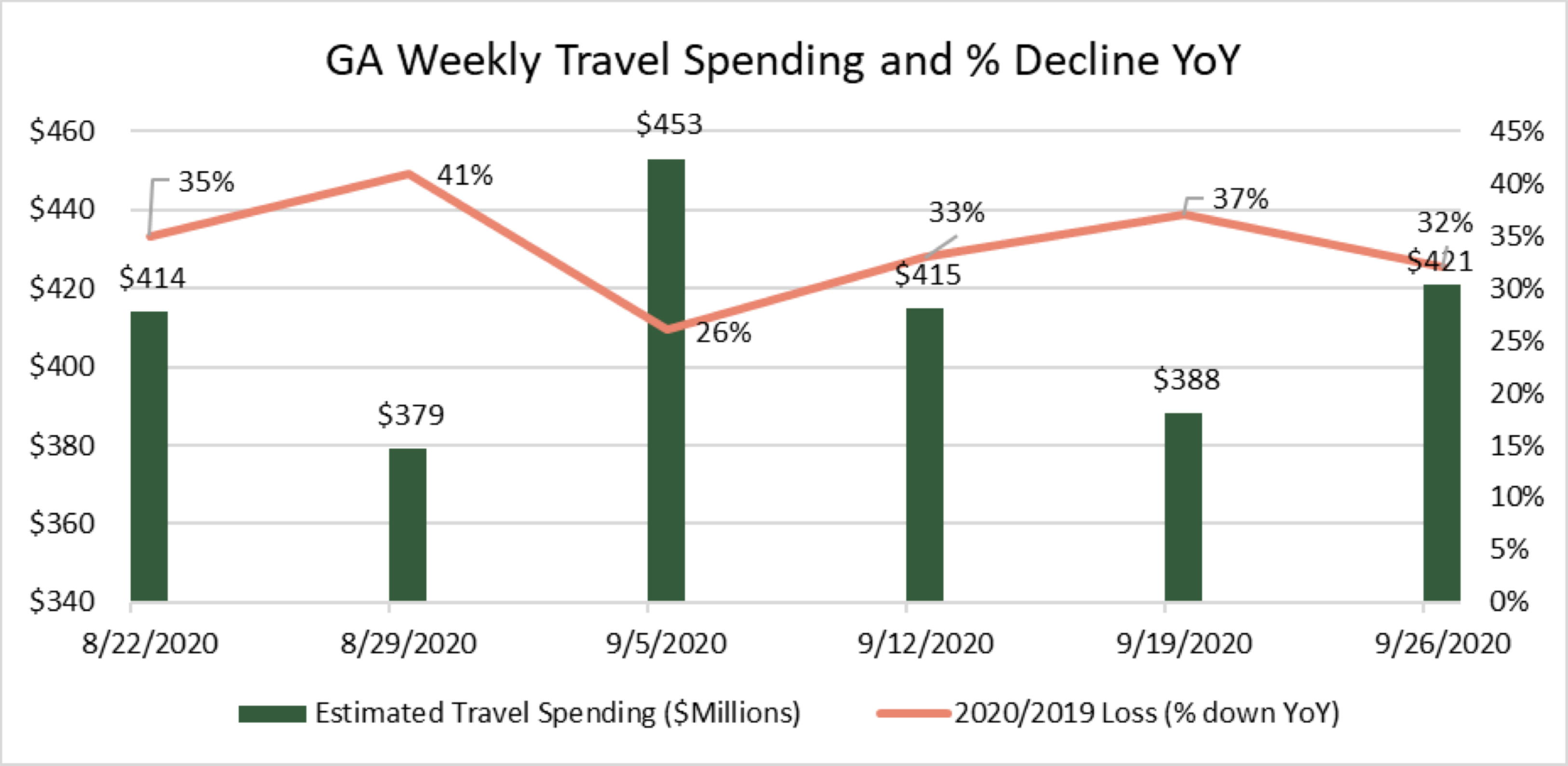
The unemployment rate in Georgia fell from 7.6% in July to 5.7% in August, but rebounded to 6.4% in September. In August and September, total Non-Farm employment grew by 50,100 jobs, 12,300 (25%) of which were Leisure & Hospitality jobs. This leaves the sector 75,300 jobs short of February employment levels, representing 40% of persistent Non-Farm employment losses.

Weekly Leisure and Hospitality Initial Unemployment Claim filings rose and fell in August and September, but overall followed a downward trend (though they continued to represent between 27% and 30% of all weekly IUC filings).



GEORGIA TRAVEL SPENDING: AUGUST & SEPTEMBER

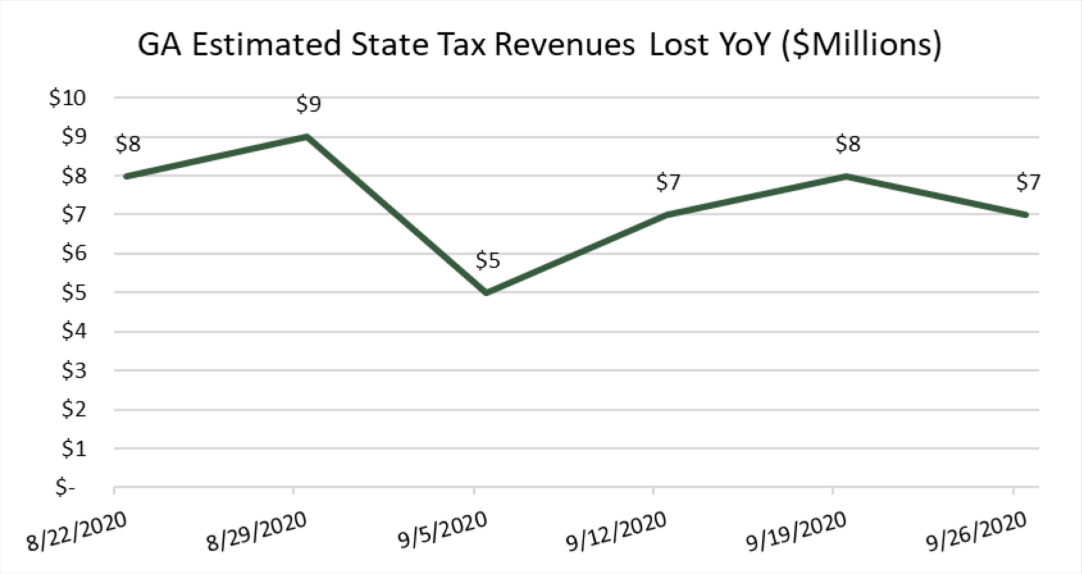
From the week-ending August 22 through the week-ending September 26, total estimated travel spending in Georgia was down $1.3 billion in 2020, compared to 2019, bringing total YoY losses to $9.6 billion. Following the boost of the Labor Day weekend, travel spending dipped as the summer travel season came to a close, but began to climb as fall weather started to set in. Weekly spending remained 51%-78% higher than the national average (including Washington, D.C. and Puerto Rico).

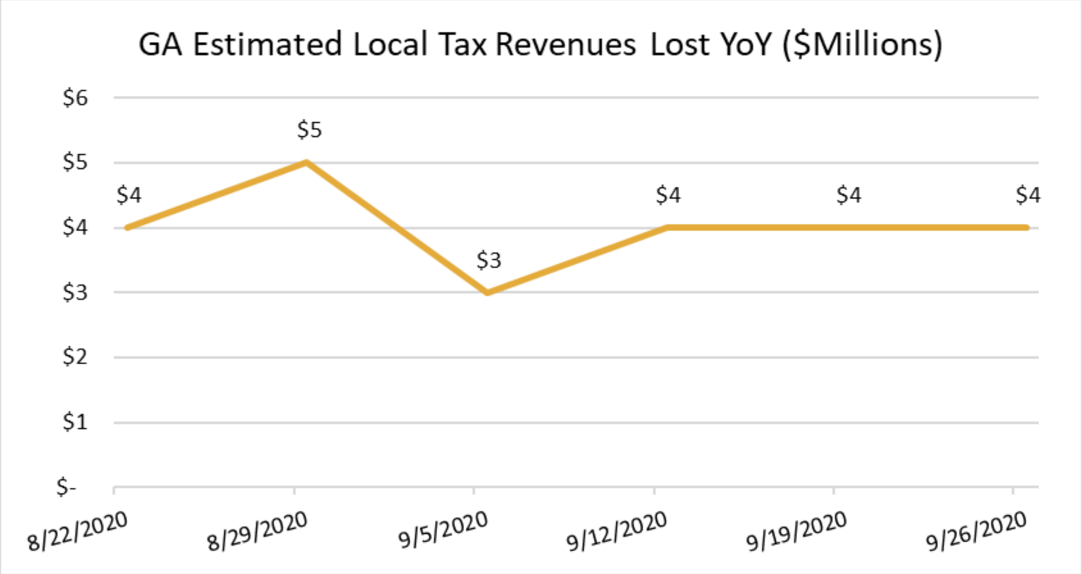


Source: Tourism Economics

GEORGIA TAX REVENUES: AUGUST & SEPTEMBER

From the week-ending August 22 through the week-ending September 26, total estimated travel-generated state and local tax revenues in Georgia were down $68 million in 2020, compared to 2019, bringing total YoY losses to $512 million. As weekly travel expenditures moved up and down, weekly tax revenue losses dipped and climbed in tandem (hitting pandemic lows over the Labor Day weekend).





Source: Tourism Economics

GEORGIA DOMESTIC VISITATION: AUGUST 2019 & 2020

In 2019, 10.7% of trips* to/within Georgia occurred in August. In 2020, total daily arrivals fell YoY in part due to the calendar shift for Labor Day weekend, but also due to overall national stagnation in travel demand.

Balanced Panel Arrivals: Aug Weekly Comparison

What is the weekly percentage change in arrivals during COVID19 outbreak period?

YOY △	-2.3%	-19.0%	-25.8%	-44.0%
WOW △	-	2.3%	-14.8%	-11.5%

Date Ranges: 08.01.2019– 08.31.2019 & 08.01.2020 – 08.31.2020 | Data Compiled: 11.05.2020 | Balanced Panel | Destination: Primary

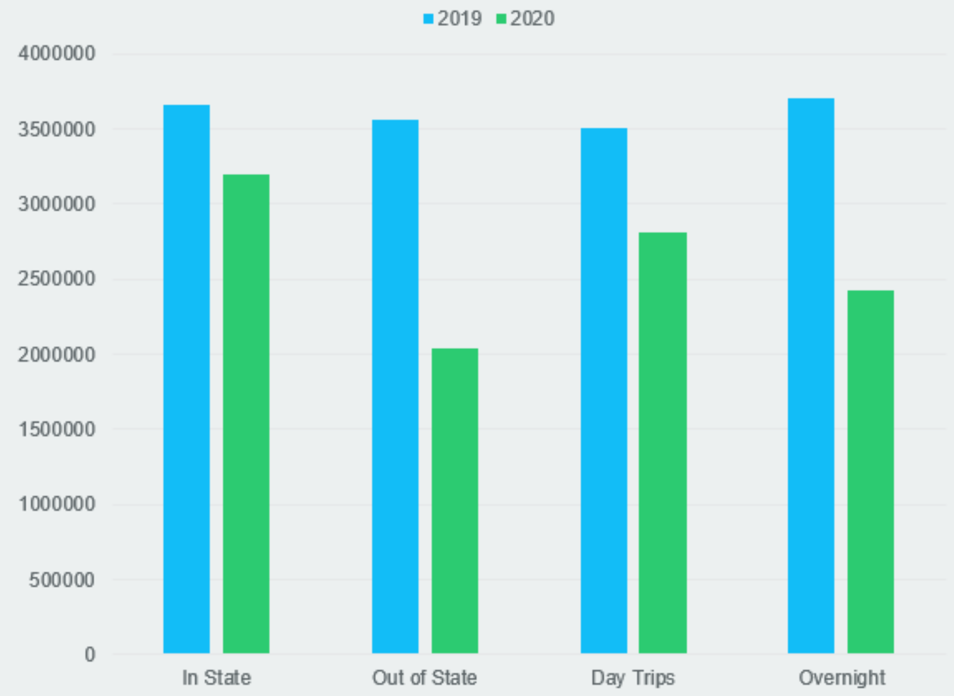
Source: Arrivalist

**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: AUGUST YOY

As a result of depressed travel demand across all segments, total trips* in August were down 28% YoY. Out-of-state and overnight trips were particularly hard hit.

August 2020 YoY Summary



Trips	YoY Change (%)
In State	-12.7%
Out of State	-42.7%
Day Trips	-20.0%
Overnight	-34.6%
Overall	-27.5%

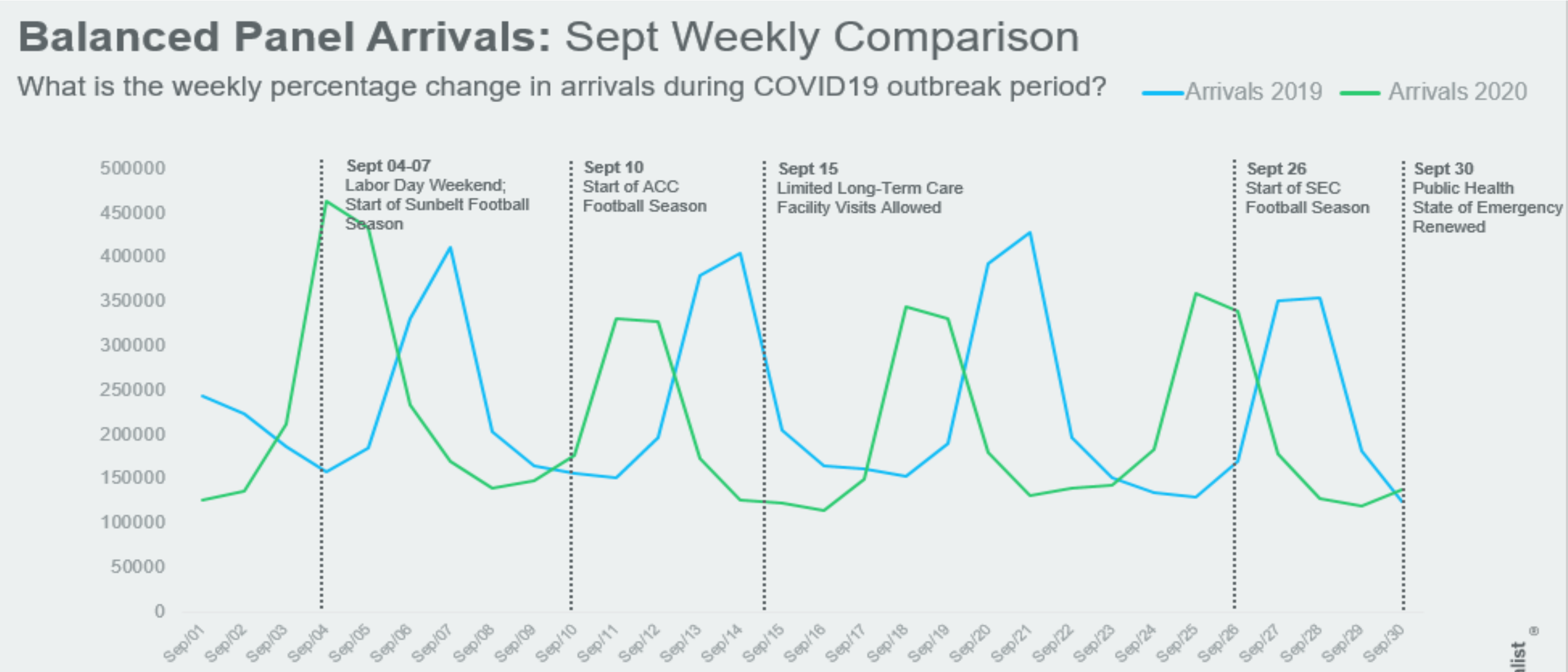
Arrivalist®

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 DOMESTIC VISITATION: SEPTEMBER 2019 & 2020

In 2019, 11% of trips* to/within Georgia occurred in September, the most of any month. In 2020, despite a significant boost from Labor Day travel, total daily arrivals were still slightly down YoY.



YOY △	8.1%	-14.2%	-18.1%	1.7%
WOW △	-	-19.9%	-3.5%	7.3%

Date Ranges: 09.01.2019– 09.31.2019 & 09.01.2020 – 09.31.2020 | Data Compiled: 11.05.2020 | Balanced Panel | Destination: Primary

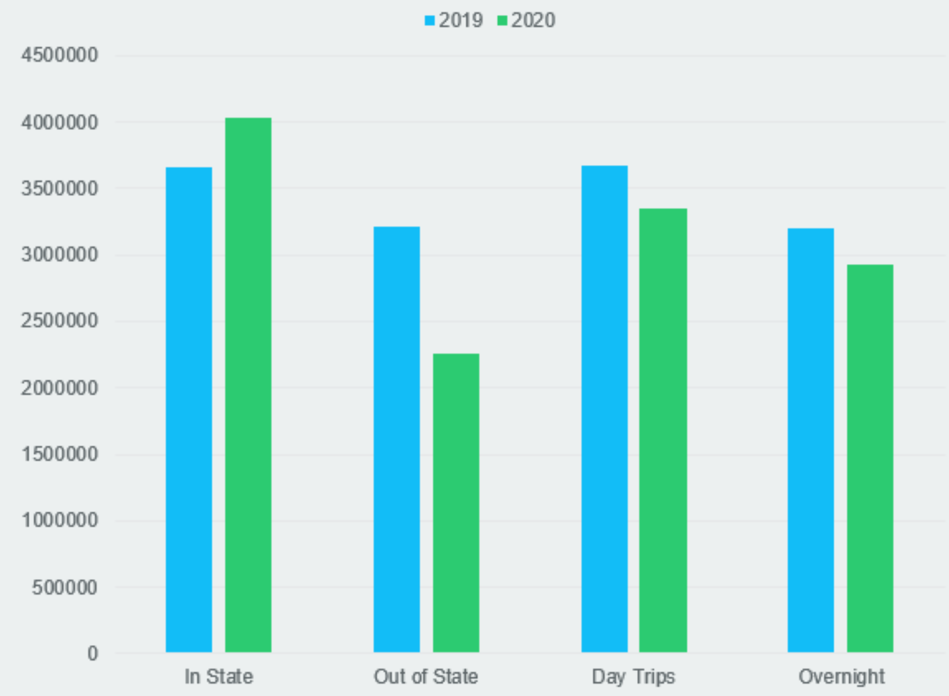
Source: Arrivalist

**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: SEPTEMBER YOY

As the Summer travel season came to a close following Labor Day weekend, total trips* in September fell 9% YoY. However, in-state trip demand was up 10% YoY.

September 2020 YoY Summary



Trips	YoY Change (%)
In State	10.1%
Out of State	-29.8%
Day Trips	-8.6%
Overnight	-8.5%
Overall	-8.6%

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 September, Georgia Hotel Rooms Sold and RevPAR were down 20% and 37%, respectively, compared to 2019 (positively affecting the YTD losses YoY). Georgia continues to outperform the national average in terms of YoY impacts on Occupancy, Rooms Sold, Revenue, ADR, RevPAR, and Room Supply.

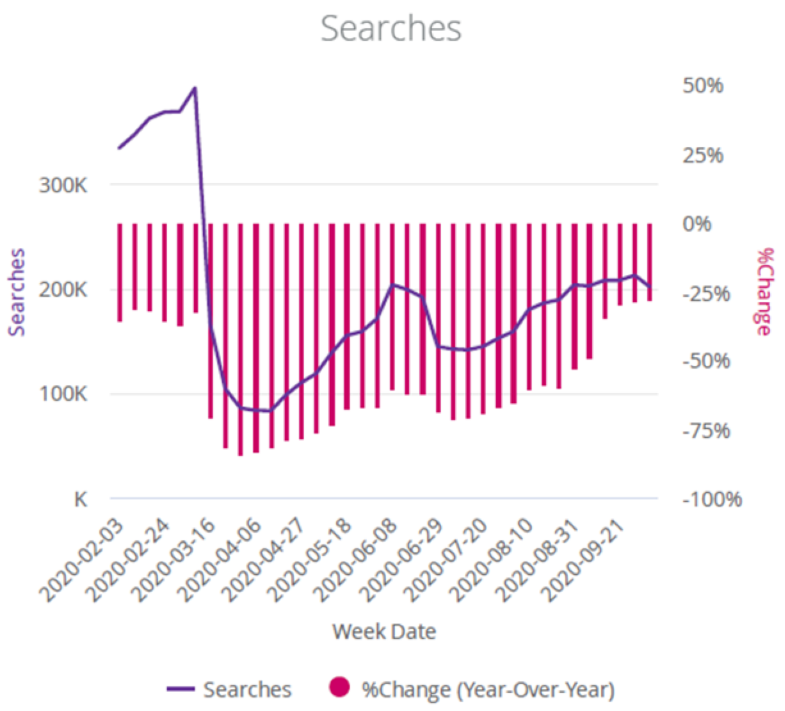
Also in September, passenger traffic was down 64% at Hartsfield-Jackson International Airport, compared to 2019, a gain of more than 30 points since the traffic low-point in April.

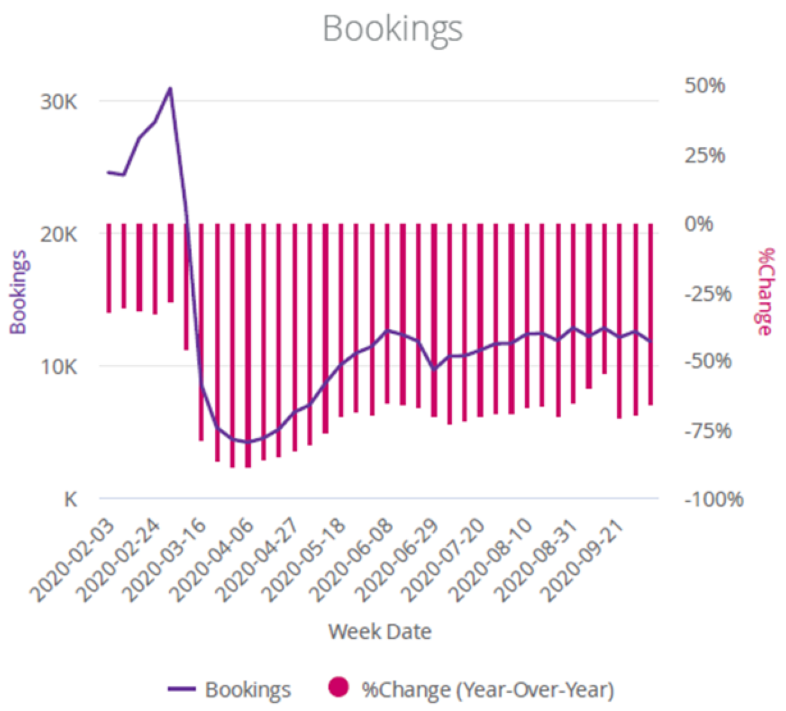
	August 2020	Jan-Aug 2020 YTD	Sept. 2020	Jan-Sep 2020 YTD
Hotel RevPAR YoY	-39.1%	-43.5%	-37.2%	-42.8%
Hotel Rooms Sold YoY	-23.0%	-29.7%	-19.7%	-28.6%
Domestic Passenger Traffic YoY	-66.9%	-59.4%	-61.4%	-59.6%
International Passenger Traffic YoY	-90.3%	--71.8%	-87.4%	-73.3%
Total Passenger Traffic YoY	-69.7%	-60.9%	--64.2%	-61.3%

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

GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

While aggregate Booking activity for Georgia flights and hotels from both domestic and international markets has been mostly flat since early August, aggregate Search activity has continued to climb. YoY losses have been trending downward since the pandemic high-point in April. Searches are now down roughly 25% YoY, compared to down 85% YoY in April, and Bookings are now down roughly 60% YoY, compared to down 90% YoY in April.





Source: ADARA

GEORGIA'S TOURISM INDUSTRY: CURRENT INDICATORS

CHECKING THE PULSE: TRAVELER SENTIMENT

- While travel spirits have begun to dampen again in response to the current outbreak wave, overall, travelers are more confident about being able to travel safely than they were during previous waves.
- Between 2/3 and 3/4 of American travelers have at least tentative trip plans in the next six months, and 55% still consider themselves to be in a "travel-ready" state of mind.
- The travel activities people feel safest about right now are taking a road trip, visiting an outdoor attraction/observation area or participating in outdoor recreation, shopping, visiting their friends and relatives, dining in a restaurant, and staying in either a hotel or a short term rental.
  - People are still looking for destinations and activities where they can be socially distant, but they have been adjusting and adapting, and have greater trust in many traditional aspects of travel now.
- While Small/Rural towns are reportedly the most desired destinations this Fall, cities/metropolitan areas are the second. In the next 12 months, cities/metros are the #1 most desired.
  - Demand for wide open spaces, quiet towns, and the paths less traveled are here to stay, but there is a growing hunger for the cultural experiences and immersion bigger cities can offer.

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

CHECKING THE PULSE: TRAVELER BEHAVIOR

- 37% of Americans traveled in September, up one point over August.
    - 35% of trips taken in September were vacations, down four points from August, while 37% of trips were VFR (a pandemic-period high).
    - Family gatherings led to gains for Small and Rural Towns, the most visited destinations in September.
- Reductions and postponements of travel plans have remained more likely than outright cancellations, with more travelers now expecting to reschedule further out (seven months+) than before.
- Holiday Travel:
    - Overall, current holiday travel expectations are tracking well below 2019 levels.
    - 50%-75% of American travelers are planning to stay home altogether this year, and nearly 50% say they are likely to skip at least one traditional holiday gathering due to COVID-19.
    - Those who do expect to travel anticipate their trips lasting just over four days on average; 36% expect to stay in a hotel or resort while 50% plan to stay with relatives.
    - December is the most popular month this year for all trip plans, including road trips.

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

CHECKING THE PULSE: TRAVELER BEHAVIOR

- Air Travel:
    - Total passenger traffic at ATL in September was 589% higher than during the pandemic low-point in April.
    - There have been significant positive shifts in perceptions about the safety of air travel (in April, 81% considered it unsafe; now just 55% do).
    - 20% of American travelers say they've taken an air trip sometime during the pandemic, and more than 35% anticipate traveling by air within the next six months (10%-20% say they have plans to fly this holiday season).
    - This could be negatively impacted by airlines returning to full capacity, as there remains strong support for vacant middle seats and other COVID-19 protocols, up to and including on-site COVID-19 tests.
    - Right now, 1/3 of American travelers report changing their upcoming trips from fly to drive market destinations (a pandemic period-high).

Sources: Hartsfield-Jackson Atlanta International Airport; Destination Analysts; Longwoods International & Miles Partnership; MMGY Global; Skift Research

CHECKING THE PULSE: TRAVELER BEHAVIOR

- Business/Convention Travel:
  - After months of stagnation in the spring and summer, confidence in the safety of group/off-site/convention business meetings is finally beginning an upturn and is now nearly double its pandemic low-point.
  - 35% of American travelers now say they'd be comfortable traveling for a conference/convention by Q1 2021.
  - There are opportunities right now for warmer destinations with outdoor spaces to capitalize on smaller, traditionally year-end group meetings.
  - Crucially, the shapers of corporate business travel policies are navigating vague waters when it comes to requirements and limitations for public health protection protocols.
    - Regardless of employees' confidence and desires, employers will certainly be more risk averse and slower to respond.
  - While people continue to express a strong preference for meeting in-person, the hybrid meeting model is likely here to stay, given its recent success and its capability to greatly extend reach and flexibility.

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

WEBSITE

For the months of August and September, we continued to see record-breaking traffic on the site. Sessions were up 64% YoY, and Partner Referrals were up more than 100% YoY.

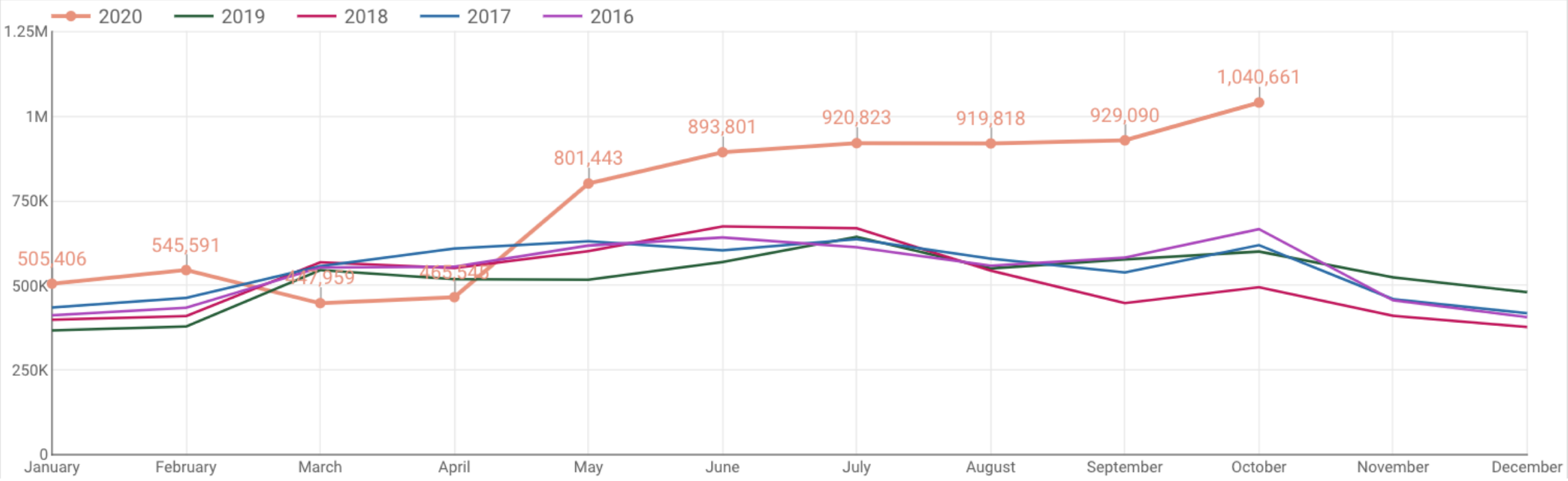
Visits were primarily driven by organic traffic, organic referrals from our social media channels, and paid social.

Traffic, Engagement and Conversions

	Sessions	Users	Pageviews	Avg. Session Duration	Bounce Rate	Pages / Session
	1,848,908	1,457,645	3,681,617	00:02:23	44.4%	1.99
YoY % Change	↑ 64.0%	↑ 56.9%	↑ 68.7%	↑ 18.6%	↓ -9.7%	↑ 2.9%
MoM % Change	↑ 1.9%	↑ 1.0%	↑ 6.1%	↑ 8.6%	↓ -2.4%	↑ 4.1%

	Official Travel Guide Order	Official Travel Guide View	eNewsletter Form Submit	Guide Orders, Views and Downloads	Partner Referrals
	12,762	11,765	895	26,471	468,944
YoY % Change	↑ 78.7%	↑ 173.2%	↑ 25.5%	↑ 98.3%	↑ 100.4%
MoM % Change	↑ 71.3%	↑ 44.9%	↓ -1.9%	↑ 49.9%	↓ -1.7%

Sessions over Time

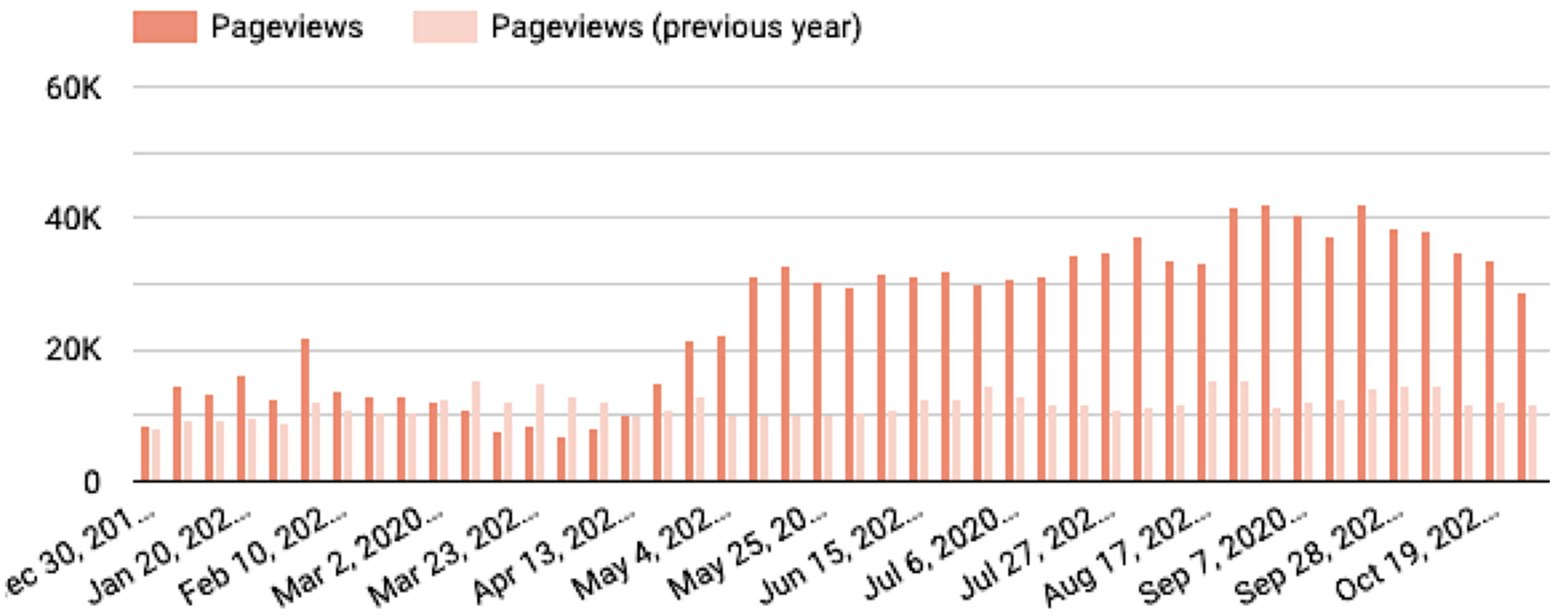


Source: Google Analytics

WEBSITE: TRAFFIC

In August and September, we began experiencing WoW decreases in traffic to the accommodations listings, travel guide, and partner referrals; however, traffic to this content continues to remain significantly higher, YoY. This is a strong indicator that travel planning continues to be relevant and important to our visitors.

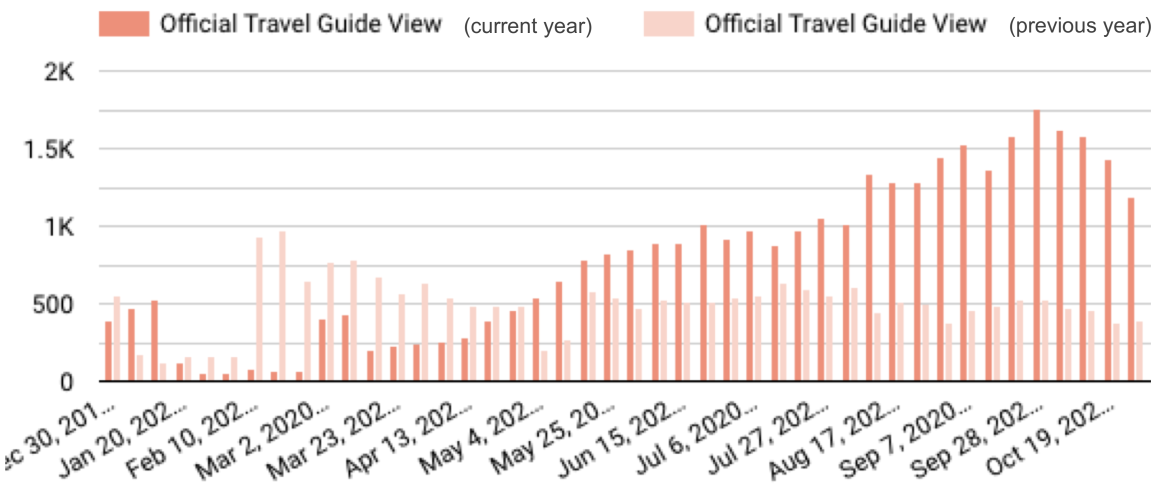
ExploreGeorgia.org: Accommodations Pageviews



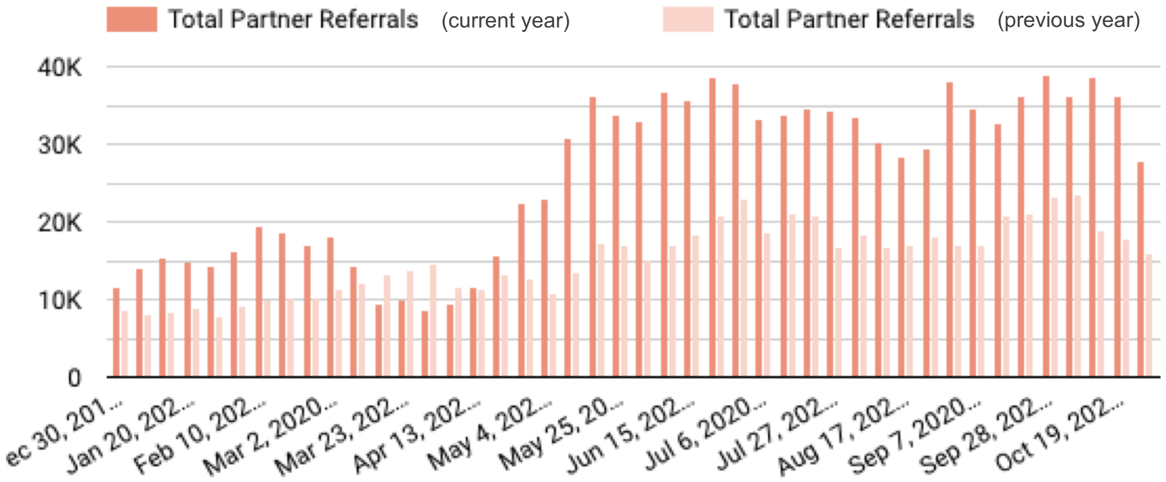
Source: Google Analytics

WEBSITE: TRAFFIC

ExploreGeorgia.org: Travel Guide Views



ExploreGeorgia.org: Partner Referrals



Source: Google Analytics

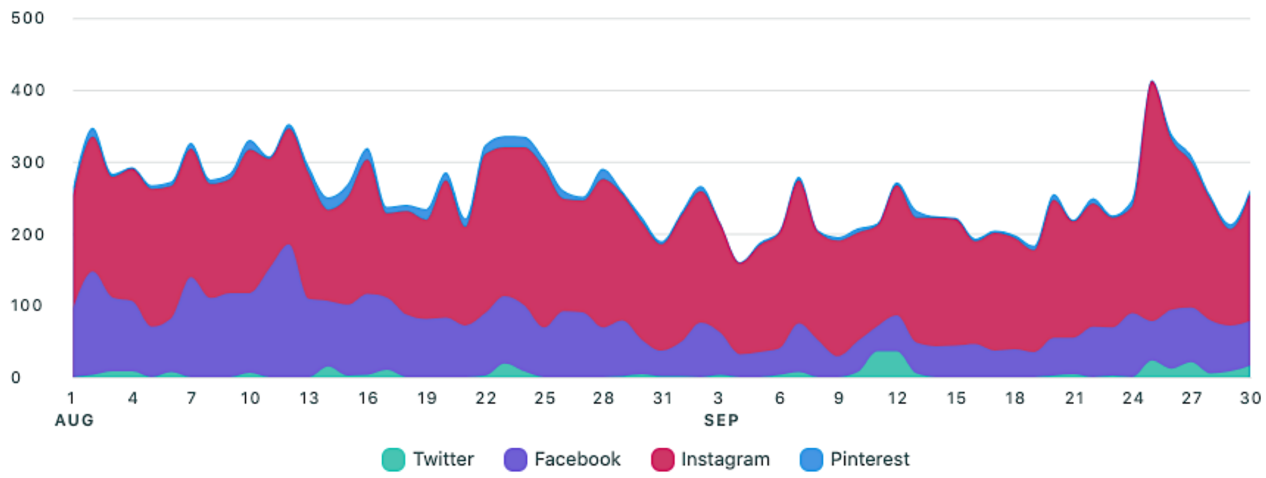
SOCIAL MEDIA

During August and September, Explore Georgia social media channels continued to experience a significant increase in followers, with the majority of the growth during these two months coming from Facebook and Instagram.

Engagement rates continued to outperform benchmarks. Top-performing posts for August and September, across all channels, featured the coast, mountains, small towns, and state parks.

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

Explore Georgia Social Media Audience Growth (MoM)



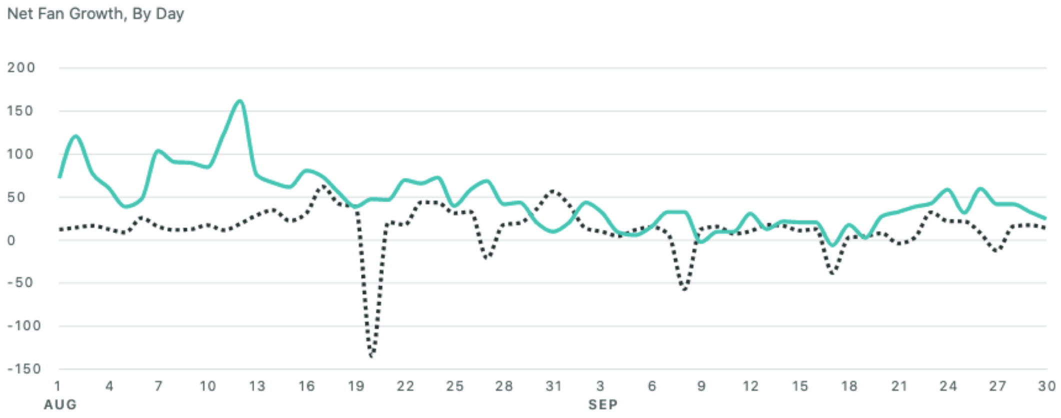
Audience Metrics	Totals	% Change
Audience Gained	15,787	↗ 16%

Source: Sprout Social

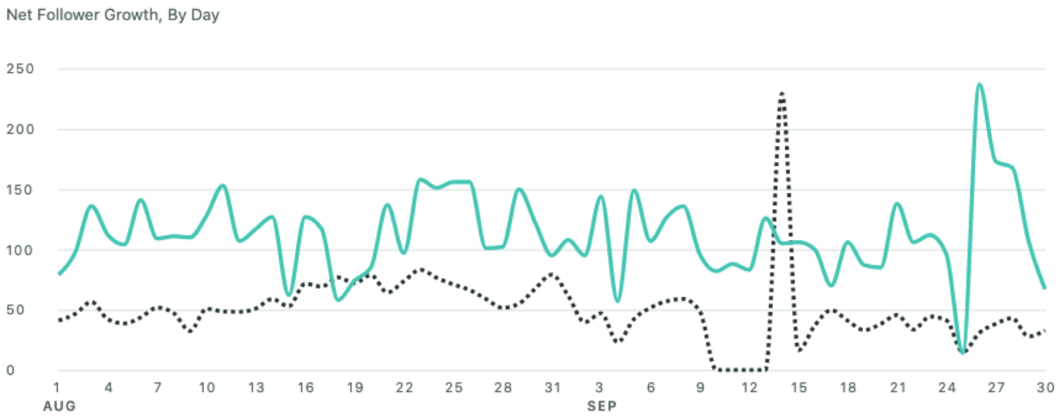
SOCIAL MEDIA

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 maintains its status as 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

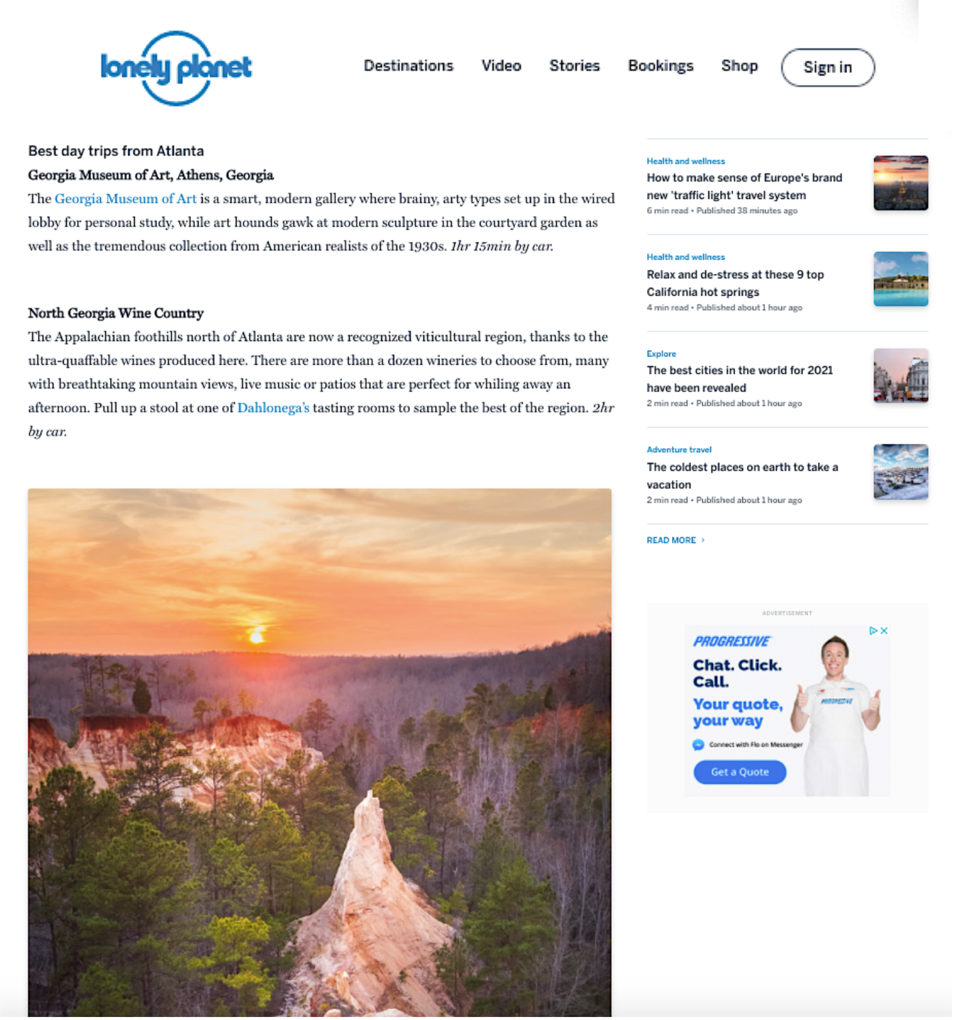
Competitor Average

Source: Sprout Social

MEDIA COVERAGE

Explore Georgia garnered excellent press coverage in August and September with articles on travel to and within the state, and coverage on the state's tourism industry.

- Taking the long way to Darien, Georgia – Florida News-Leader
- 6 Haunted Places In Georgia Where You Can Actually Stay Overnight – Narcity
- The 12 best day trips in the US Southeast – Lonely Planet
- Are you brave enough to spend the night in these real-life haunted houses? – Lonely Planet
- Savannah tourism leader: Local, state tourism trending towards 'recovery plus' – Savannah Morning News
- Tourism commissioner: Georgia on the 'hearts and minds' of would-be visitors – Savannah Morning News



Destinations Video Stories Bookings Shop Sign in

Best day trips from Atlanta

Georgia Museum of Art, Athens, Georgia

The Georgia Museum of Art is a smart, modern gallery where brainy, arty types set up in the wired lobby for personal study, while art hounds gawk at modern sculpture in the courtyard garden as well as the tremendous collection from American realists of the 1930s. *1hr 15min by car.*

North Georgia Wine Country

The Appalachian foothills north of Atlanta are now a recognized viticultural region, thanks to the ultra-quaffable wines produced here. There are more than a dozen wineries to choose from, many with breathtaking mountain views, live music or patios that are perfect for whiling away an afternoon. Pull up a stool at one of Dahlonega's tasting rooms to sample the best of the region. *2hr by car.*

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READ MORE ›

Source: Sprout Social

QUESTIONS?

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