



Explanation of Major County Economic Impact Shifts

For the 2020 Travel Economic Impact Study, Explore Georgia transitioned to working directly with Tourism Economics (TE) rather than the U.S. Travel Association (USTA) as in years past. To establish consistency in reporting of historical economic impact values, TE used their methodology to calculate revised economic impacts for Georgia and its counties back to 2016.

As part of this work, Tourism Economics undertook an extensive data collection in order to model visitor spending at the county level. Key data points collected at the county level include sales tax data for key tourism industries, bed tax collections, \$5 lodging fee data, and employment and income by industry. While each data point may not have been available for every county, the breadth of this data allowed for a bottom-up view of visitor activity by county that influenced each county's results.

Readers will note a few areas in which the analysis differs from previous reports:

- Attribution of Hartsfield-Jackson Atlanta International Airport (ATL)'s as an entity to Fulton County, not Clayton County, as in previous reports
 - Most governmental statistics show employment and income of ATL to be in Fulton County. TE's county analysis follows these examples and models the airport to be in Fulton County
- Category spending changes at the state level affecting county spending
 - Travel spending categories' definitions and proportions at the state level were modified to reflect those reported in Explore Georgia's Longwoods Travel USA Visitor Profile, which caused some re-alignment of expenditures estimates between categories
 - Resulting changes added spending to the retail and recreational categories and reduced spending in the food & beverage category. As a result, counties which formerly had strong retail & recreation spending estimates gained relative to those which formerly had strong food & beverage spending estimates
- Breadth of lodging data allowing for several viewpoints into 2nd home rental and 2nd home ownership
 - The input of these more comprehensive data sources altered the estimated size of local demand in some regions, leading to the redistribution of, and revisions to, spending in other categories determined to be attributable to tourism
 - Additional data on 2nd home rental and ownership increased expenditures, for example, in the Coastal and Northeast Georgia Mountain Regions

The changes above were reflected in the visitor spending breakouts, both current year (2020) and historical (2016-2019), by county. With county impacts tied to county spending levels in each category, economic impact changes reflect the revised county spending estimates.



Of note is another key difference in the impact analysis that affects county impacts, beyond the spending changes noted above. TE only includes air employment and income attributable to visitor activity in Georgia, while USTA's modeling included all wages paid to air transportation industry employees. A portion of air industry employment and income reflects back-office or airline headquarters in Georgia, and TE excludes these jobs and income from visitor impacts in Georgia. This effectively lowers air industry income (and therefore total labor income) at the state level, which is subsequently reflected in the county results.

TE completed their analysis with their own methodology, independent of any assumptions made by USTA. While historical statewide and aggregate regional estimates were roughly equivalent between the models, the instances where impacts were reallocated between counties and/or categories are most directly a result of TE's utilization of more granular data on key tourism spending sectors.

For questions or assistance, please contact your Regional Tourism Marketing Manager below.

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