

EXPLORE  
GEORGIA

COVID-19 DASHBOARD

March/April 2020

# COVID-19 DASHBOARD

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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

## March/April 2020

- Across the country, the month of March was devastating for the economy as a whole, and for the tourism industry in particular.
- Impacts on employment, travel spending, and visitation have continued and become more severe in the month of April.
- Many forecasts predict the worst may be behind us, with declines stabilizing in the month of May.
- Much remains uncertain about the timetable for recovery, but sentiment research reveals that many travelers will be looking to test the waters with nearby, road-trip destinations within three to six months of travel restrictions being lifted.
- Early indicators signal that the state is well-positioned for a strong recovery, and many Georgia destinations will be able to use pent-up demand and the emerging traveler's tastes and preferences to their advantage.
- Visitor behavior on our website and insights from our social media channels indicate visitor interest in, and engagement with, our travel products is steady and recovering faster than other state DMOs.

# GEORGIA'S TOURISM INDUSTRY: CURRENT STATUS

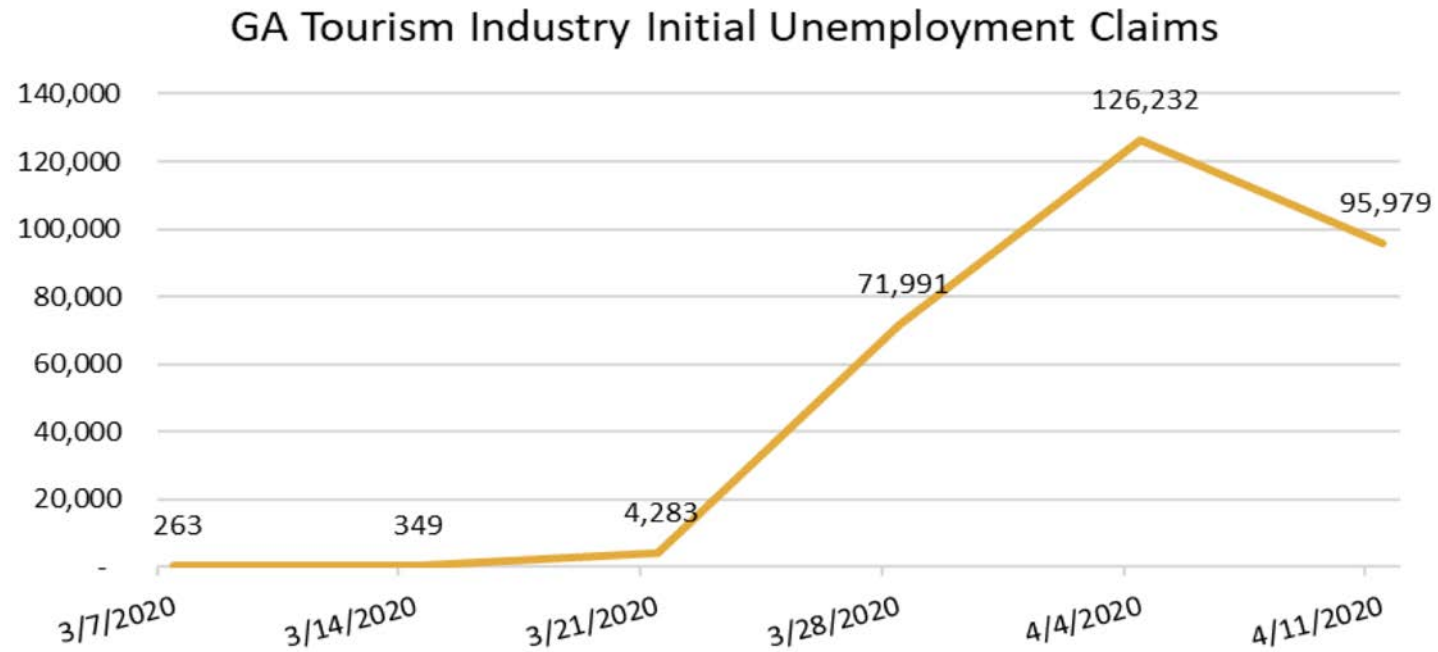
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# GEORGIA UNEMPLOYMENT: MARCH & APRIL

From March 1 – April 11, there were 865,687 initial unemployment claims (IUCs) filed with the Georgia Department of Labor. Combined, the “Accommodations and Food Services” and “Arts, Entertainment, and Recreation” sectors represented 35% (299,097) of all IUCs filed over this period.

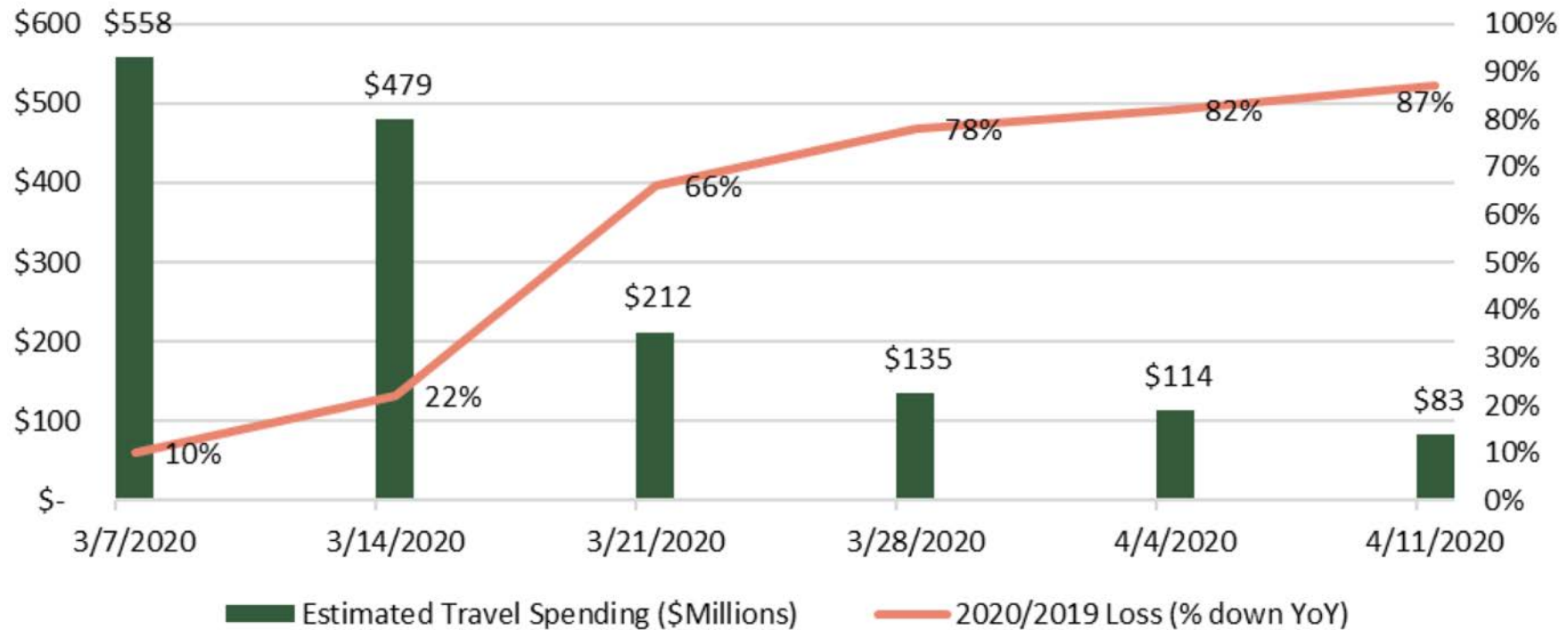
It’s too soon to know if weekly Tourism IUCs have peaked, but they did drop the week ending 4.11.20.



# GEORGIA TRAVEL SPENDING: MARCH & APRIL

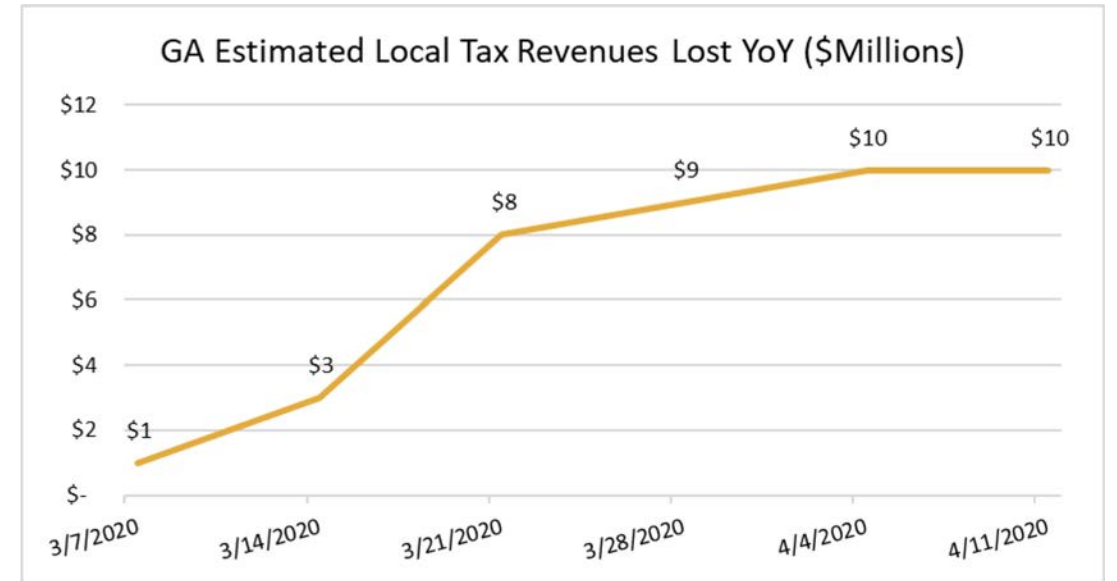
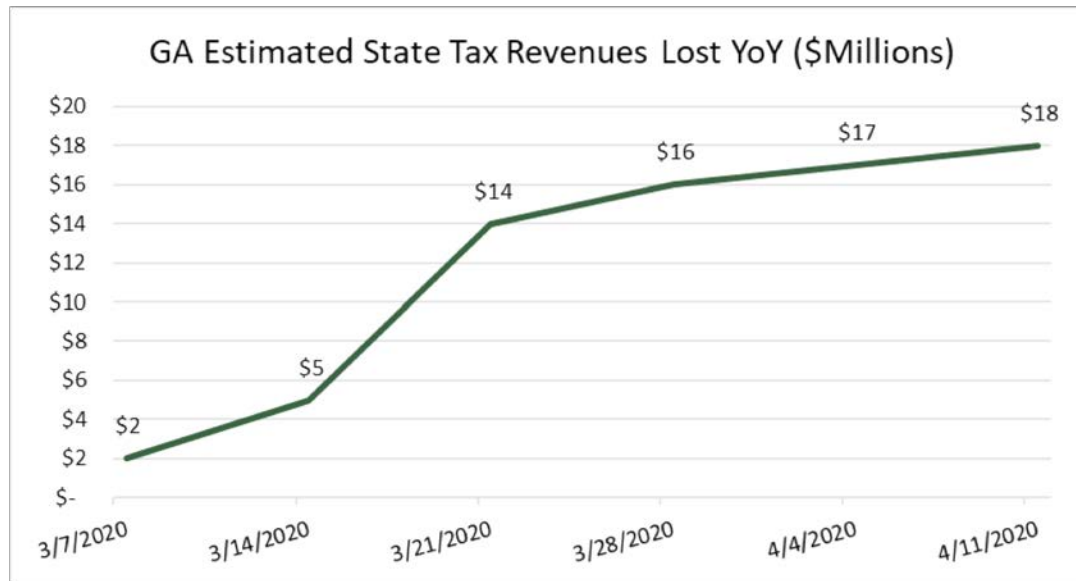
From March 1 – April 11, total estimated travel spending in Georgia was down \$2.14 billion in 2020 compared to 2019, with spending declining weekly, but possibly stabilizing. Expenditures the week-ending 4.11.20 were down 87% YoY.

### GA Weekly Travel Spending and % Decline YoY



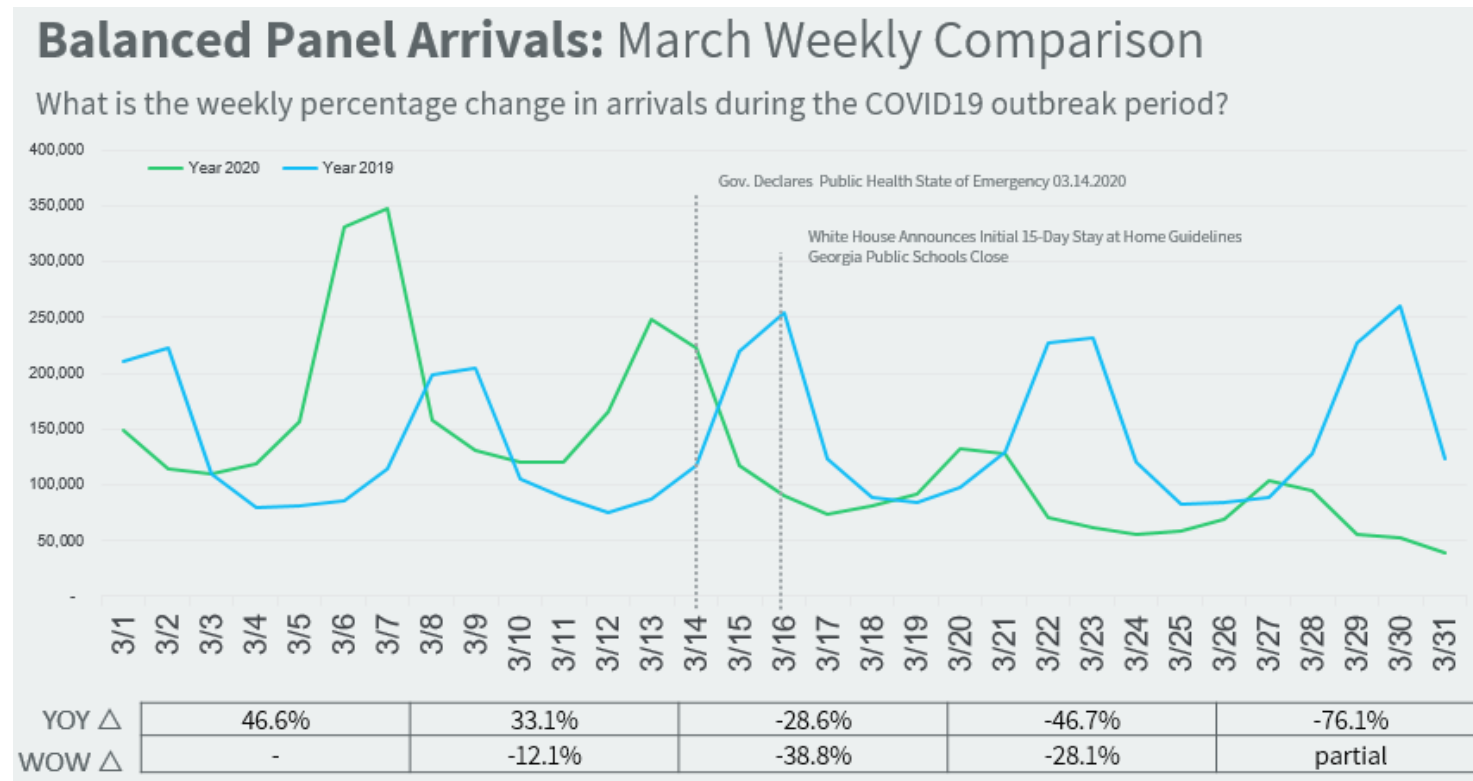
# GEORGIA TAX REVENUES: MARCH & APRIL

From March 1 – April 11, total estimated travel-generated state and local tax revenues in Georgia were down \$113 million in 2020 compared to 2019, with tax revenues declining weekly, though possibly stabilizing.



# DOMESTIC TRIPS: MARCH 2019 & 2020

In 2019, 7.1% of trips\* to/within Georgia occurred in March (the most of any month in Q1 & Q2). 2020 started off strong with YoY gains in the first two weeks, but following the first reported COVID-19 death on March 12<sup>th</sup> and the State of Emergency declaration on the 14<sup>th</sup>, daily arrivals dropped off rapidly.

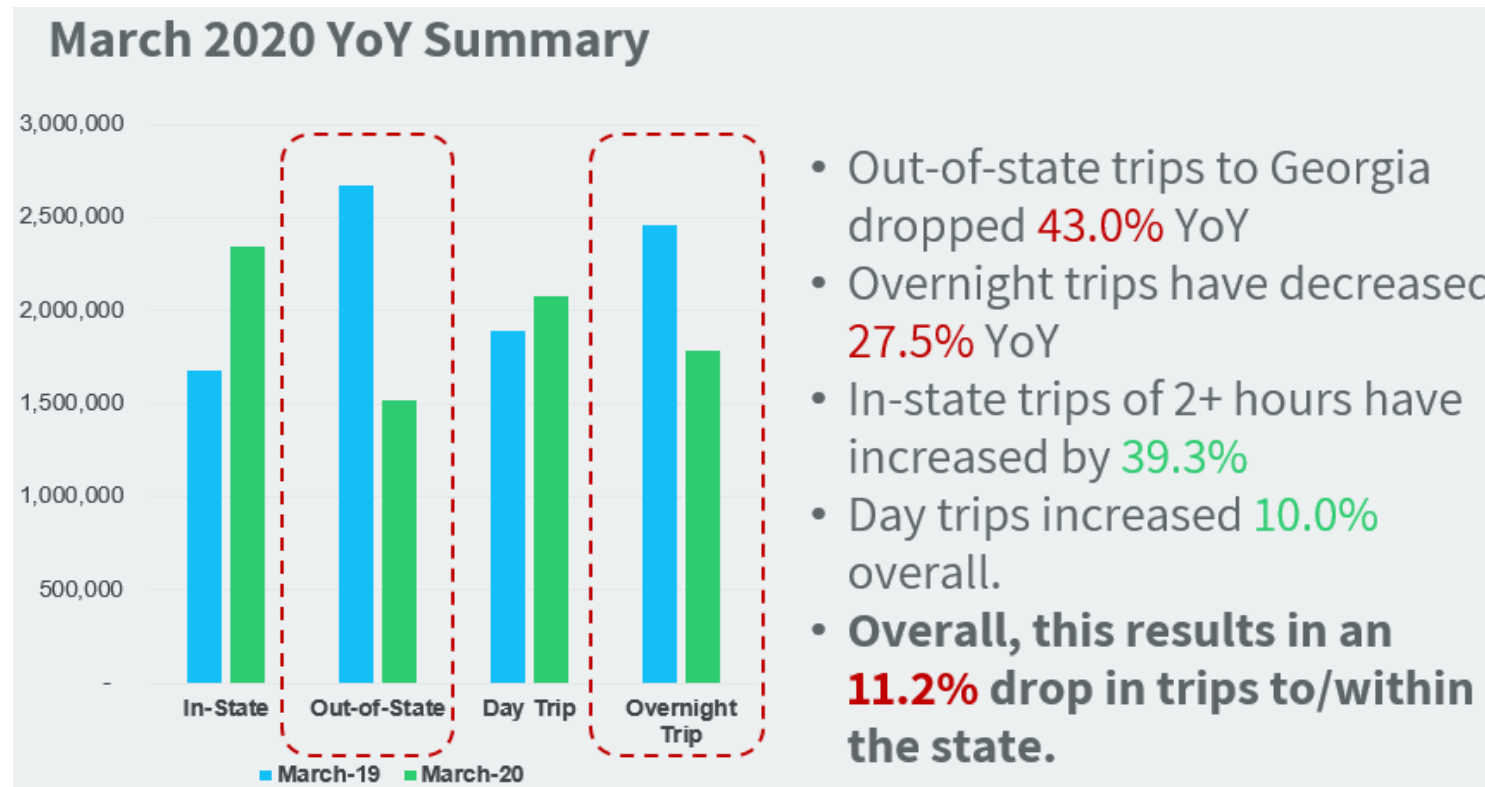


Source: Arrivalist

\*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.

# DOMESTIC TRIPS: MARCH 2019 & 2020

The YoY 11.2% decline in March trips\* was driven by impacts on the out-of-state and overnight trip segments. In-state trips and day trips actually increased YoY, possibly as a result of travelers substituting outbound and long-haul trips for those closer to home.



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'S TOURISM INDUSTRY: EARLY INDICATORS

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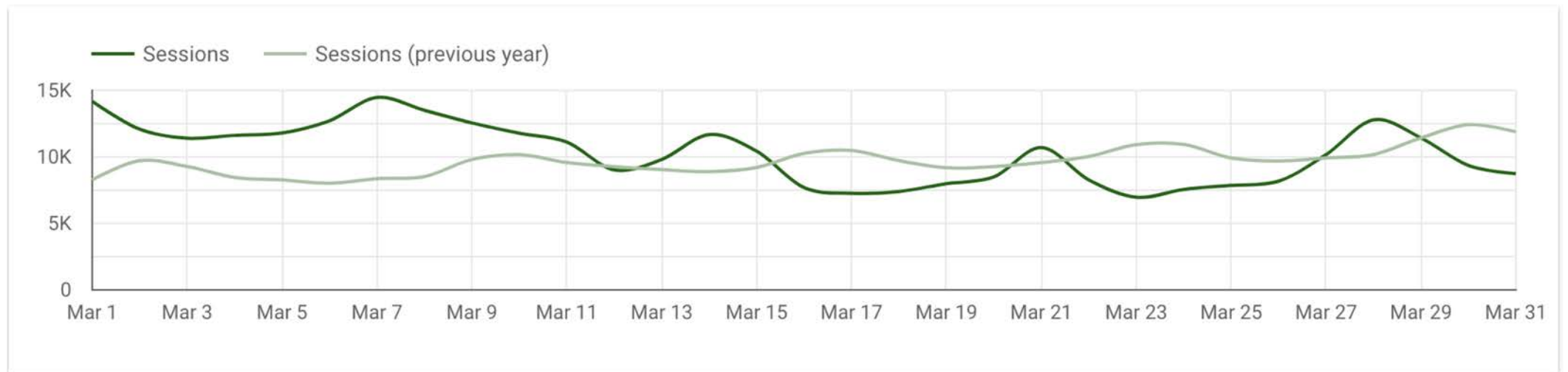
# CHECKING THE PULSE: TRAVELER SENTIMENT RESEARCH

- 35%-45% of Americans are reducing or postponing their travel plans
- 45%-65% of Americans are cancelling a trip completely
- Travelers are increasingly unsure the pandemic will be under control by summer, 50% believe they will begin travelling in the fall
- $\frac{1}{3}$  of travelers said they would resume travel within three months of the removal of travel restrictions, 28% said four-to-six months afterward
- Post-COVID, regional, drive-market destinations will be substituted for long-haul, outbound destinations:
  - 11%-22% of travelers have reported substituting a domestic trip for an international trip
  - 17%-30% of travelers reported substituting a drive-market trip for an air-travel trip
  - 43%-51% of travelers reported their future destination choices will be regional rather than long-haul
  - 27%-37% of travelers reported their preferred destinations will be small towns/villages/rural areas/the countryside
  - 27%-50% of travelers reported their preferred destinations will be beach destinations
  - $\frac{2}{3}$  of travelers expect when they resume travel, their first trip will be a domestic road trip; the majority, 41%, expect to stay within 100 miles of home

# WEBSITE: ORGANIC TRAFFIC

To understand recent impacts on website traffic, we benchmarked ExploreGeorgia.org's performance against websites for 30 DMOs (state and local). In March, average organic traffic was down 25% YoY, but Explore Georgia only experienced a 13% decrease. All sites saw a traffic crash mid-month when stay-at-home orders took hold nationally. On average, organic traffic post-crash has been down 80%. To date, Explore Georgia hasn't been down more than 50% since the mid-month crash.

## ExploreGeorgia.org Organic Traffic

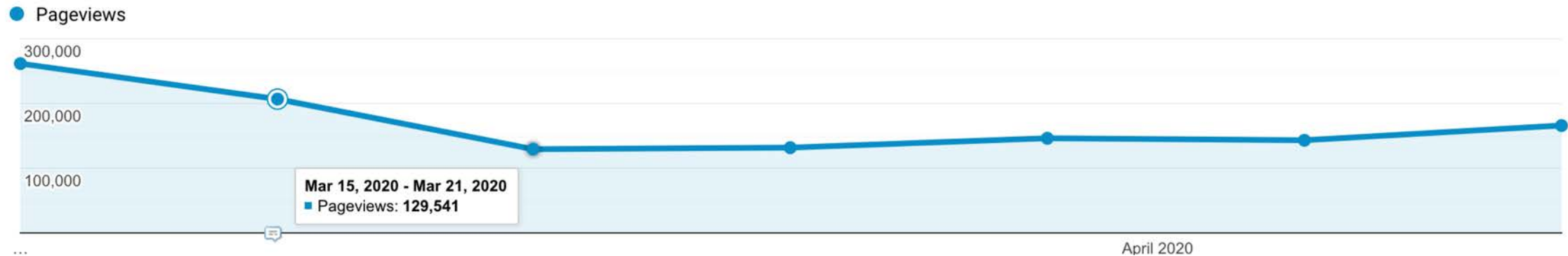




# WEBSITE: PAGEVIEWS

Since the week of the crash, we have seen a leveling out of pageviews, and are now experiencing steady growth. Our positive traffic and pageview numbers can be attributed to our strong brand, strong SEO, and the Explore Georgia from Home campaign.

## ExploreGeorgia.org Pageviews



# WEBSITE: PRIMARY PAGES

The screenshot shows the 'COVID-19 Travel Information' page. At the top left is the 'EXPLORE GEORGIA' logo. To the right is a navigation bar with links: 'EXPLORE DESTINATIONS | FIND THINGS TO DO | FIND PLACES TO STAY | PLAN YOUR TRIP | SEARCH Q'. The main heading is 'COVID-19 Travel Information' with a sub-heading 'Last Updated April 9, 2020, at 7 a.m.'. Below this is a section titled 'COVID-19 in Georgia' containing a bulleted list of updates and guidance. A second section titled 'Guidance for Travelers' contains another bulleted list. At the bottom, there are three call-to-action buttons: 'Order a FREE 2020 Travel Guide', 'Follow Us' (with social media icons), and 'Sign up for News & Events'.

**EXPLORE GEORGIA** EXPLORE DESTINATIONS | FIND THINGS TO DO | FIND PLACES TO STAY | PLAN YOUR TRIP | SEARCH Q

## COVID-19 Travel Information

Last Updated April 9, 2020, at 7 a.m.

### COVID-19 in Georgia

- The health and safety of Georgians and our visitors is the highest priority for Georgia's tourism industry.
- On Feb. 28, 2020 Governor Brian P. Kemp announced a coronavirus task force to address Georgia's preparation and response to cases of COVID-19.
- Governor Kemp and the Georgia Department of Public Health (DPH) announced a [daily status report page](#) for confirmed COVID-19 cases in Georgia. This page will replace nightly press releases from the Governor's Office and DPH and will be updated every evening at midnight to ensure accurate and regular information is provided to the public. You can view the new tool on the [DPH website](#).
- Explore Georgia is actively monitoring developments and information surrounding the virus' potential impact on travel to and within the state.
- With the situation evolving rapidly, we encourage our visitors traveling to and within the state to follow the most up-to-date information and guidance offered by the [Centers for Disease Control and Prevention](#) (CDC), [Georgia Department of Health](#), and local authorities.

### Guidance for Travelers

- Governor Brian Kemp has extended the statewide shelter in place order through April 30. Gov. Kemp also ordered the closing of Georgia Public Schools through the end of the 2019-2020 school year. Both orders can be seen [here](#).
- Georgia's beaches are open, but visitors should follow [CDC social distancing guidelines](#). Additionally, the Georgia Department of Natural Resources issued an order prohibiting the use of chairs, tents and umbrellas seaward of the ordinary high-water mark, through April 13. Full details on the order can be seen [here](#). Ferry service to Cumberland Island has been suspended until further notice.
- On April 8, Gov. Kemp signed an order to suspend short-term vacation rentals in Georgia through April 30. The term "vacation

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## [COVID-19 Travel Alert](#)

Information about COVID-19 in the state, as well as guidance and information for travelers

The screenshot shows the 'Explore Georgia from Home' page. At the top left is the 'EXPLORE GEORGIA' logo. To the right is a navigation bar with links: 'EXPLORE DESTINATIONS | FIND THINGS TO DO | FIND PLACES TO STAY | PLAN YOUR TRIP | SEARCH Q'. The main heading is 'Explore Georgia from Home' with a sub-heading 'A complete list of virtual experiences.'. Below this is a paragraph of text and a link to social media. A large image of a shark underwater is featured, with a text box overlaid on it. At the bottom, there are three call-to-action buttons: 'Order a FREE 2020 Travel Guide', 'Follow Us' (with social media icons), and 'Sign up for News & Events'.

**EXPLORE GEORGIA** EXPLORE DESTINATIONS | FIND THINGS TO DO | FIND PLACES TO STAY | PLAN YOUR TRIP | SEARCH Q

## Explore Georgia from Home

A complete list of virtual experiences.

We're all in this together, and Georgia will be ready and waiting for you when it's time to travel again. Until then, use this list to find virtual ways to explore the state. From digital chats with zookeepers to free concerts online, Georgia's virtual experiences are growing daily! Check back often to see what's new.

For now, stay safe, stay home and follow along as we [#ExploreGeorgiaFromHome](#) on [Facebook](#), [Instagram](#), and [Twitter](#).

**Explore Georgia from Home: A Complete List of Virtual Visits**

We're all in this together, and Georgia will be ready and waiting for you when it's time to travel again. Until then, use this list...

Order a FREE 2020 Travel Guide Follow Us Sign up for News & Events

## [Explore Georgia from Home](#)

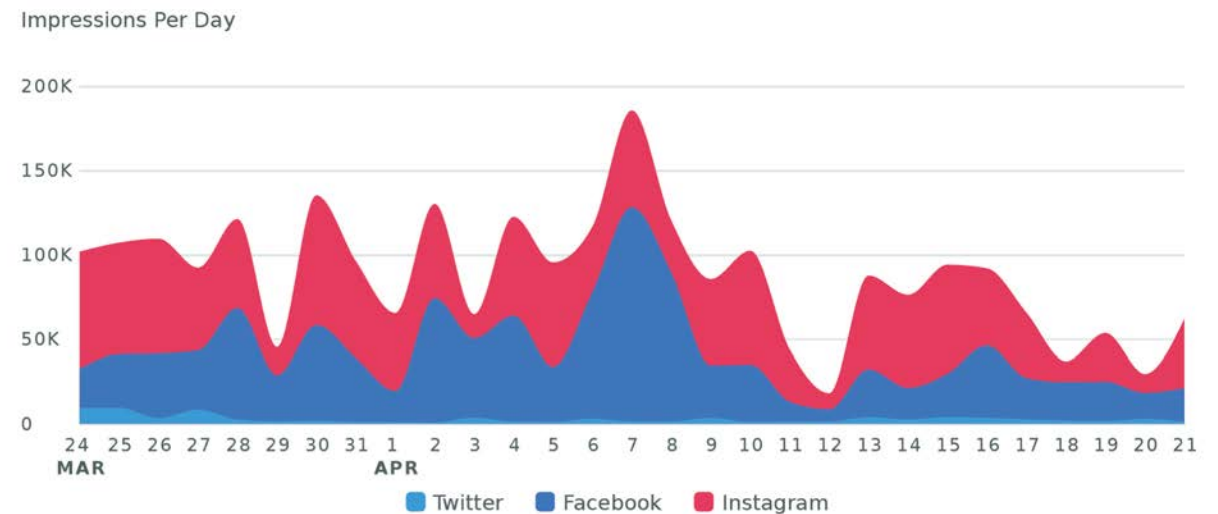
A digital oasis where visitors can get lost in the beauty of our state, learn a little, and play safely from their homes

# SOCIAL MEDIA

All Explore Georgia social media channels were dark during the initial days of the pandemic in early March. In late March, we began posting again as part of the Explore Georgia from Home campaign, sharing moments of Zen, good news stories, and new tools and games. Since then, this new content continues to perform beyond our benchmarks.

Despite a significant pivot in the type of content being shared, all channels continue to see MoM growth in engagement rates, impression levels, and followers. This approach is clearly filling a need with our visitors and keeping the state top of mind.

## Explore Georgia Social Media Impressions

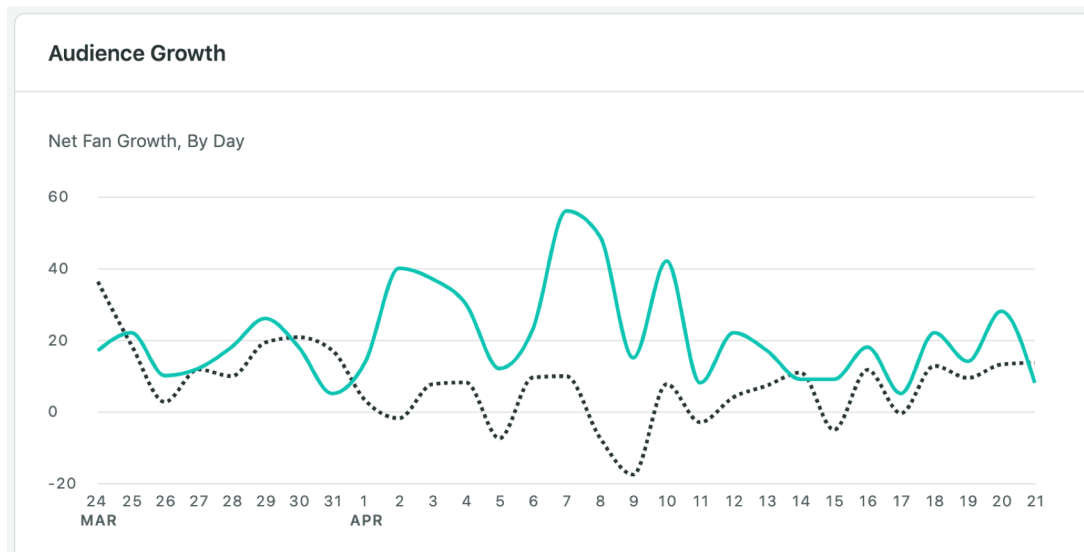


Impression Metrics	Totals	% Change
<b>Total Impressions</b>	<b>2.6m</b>	<b>↗ 36%</b>

# SOCIAL MEDIA

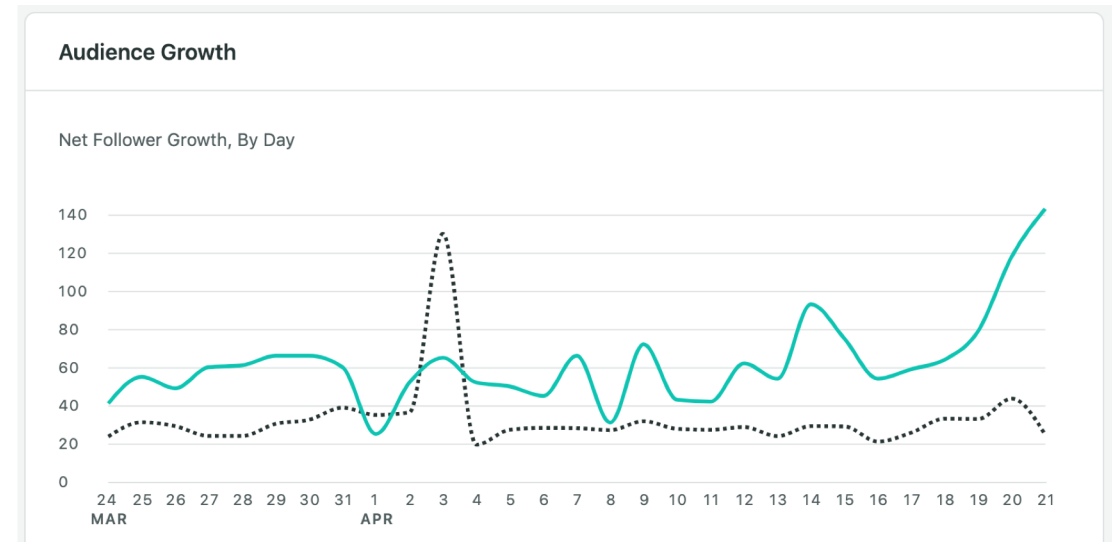
Looking at our competitive set of state DMOs in the southeast, Explore Georgia is leading the pack in terms of gaining new followers during this crisis.

## Facebook



- Explore Georgia
- Competitor Average

## Instagram



# SOCIAL MEDIA: CONTENT EXAMPLES



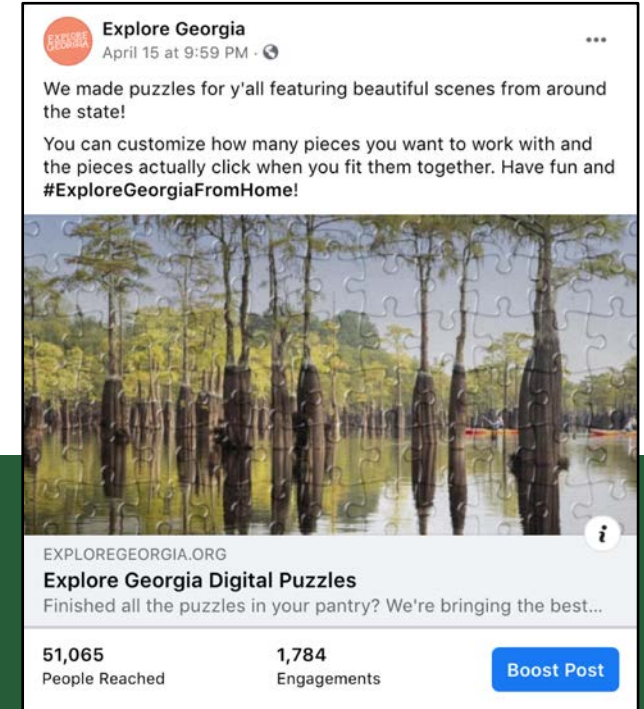
## Good News Story

Kittens from the Atlanta Humane Society visiting the Georgia Aquarium



## Moment of Zen

Video walking through a sunflower field at Fausett Farms



## Tools/Games

Digital puzzles featuring photography from the state's nine regions

# EXPLORE GEORGIA

## QUESTIONS?

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