

Tourism As Economic Development

April 29, 2022
ECG Economic
Development Summit



EXPLORE
GEORGIA®

OUR MISSION

Explore Georgia, the tourism division of the Georgia Department of Economic Development, is the state's official destination marketing organization. Through its home office in Atlanta, nine visitor information centers, and a network of representatives across the globe, Explore Georgia inspires travel to and within the state through marketing programs developed and executed in partnership with the state's travel industry.

AGENDA

I. Industry Overview

II. Impact of COVID

III. Future Forecast



Industry Overview



IMPACT OF TOURISM



U.S. TRAVEL: A GROWING INDUSTRY

FIGURE 1: Travel Expenditures in the U.S., 2008-2018
(\$ BILLION)



SOURCES: U.S. Travel Association, U.S. Department of Commerce

GEORGIA'S TOURISM INDUSTRY (2019)

DOMESTIC
VISITORS

150.9
MILLION

INTERNATIONAL
VISITORS

1.4
MILLION

VISITOR SPENDING

Domestic & International

\$38.9
BILLION

TOTAL STATE & LOCAL TAX
REVENUES GENERATED

\$3.5
BILLION

TOTAL ECONOMIC
IMPACT

\$69.0
BILLION

**Travel industry
represents one of
the largest
workforces in the
state**

TOTAL JOBS SUPPORTED

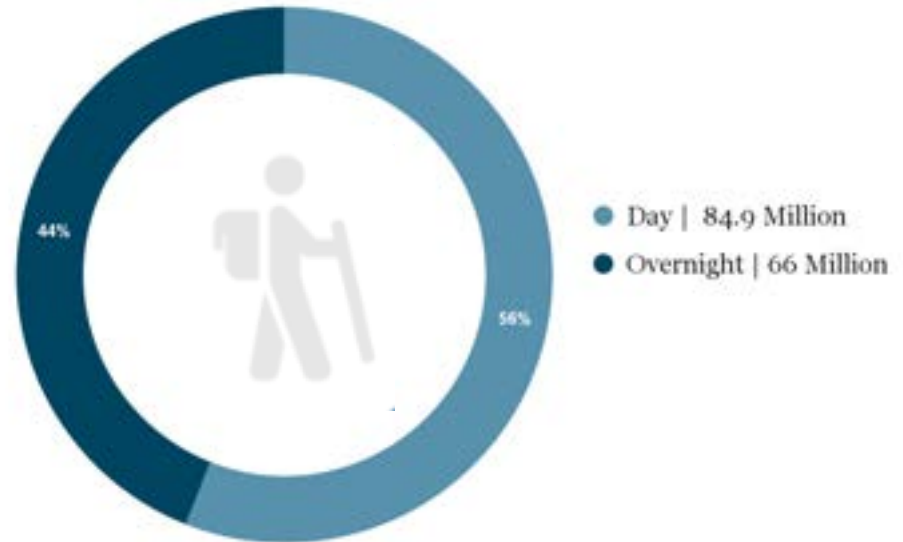
484,000

2019 VISITOR PROFILE

TAKEAWAY:

A visitor is defined as someone who travels 50 miles or more to engage in tourism-related activities; overnight visitors spend more than day visitors, business more than leisure.

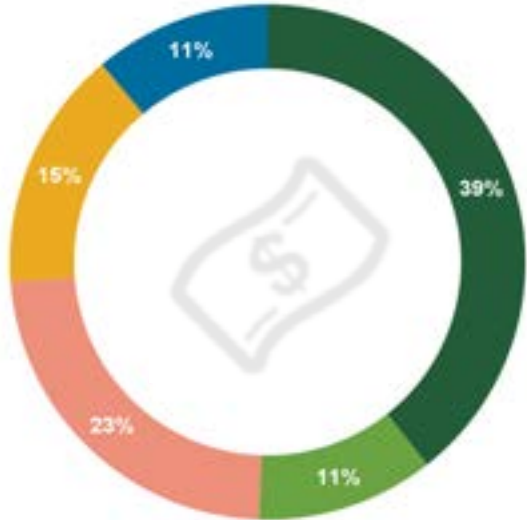
Size of Georgia 2019 Domestic Travel Market



2019 DOMESTIC OVERNIGHT EXPENDITURES

TAKEAWAY:

Lodging accounts for nearly 40% of spending.



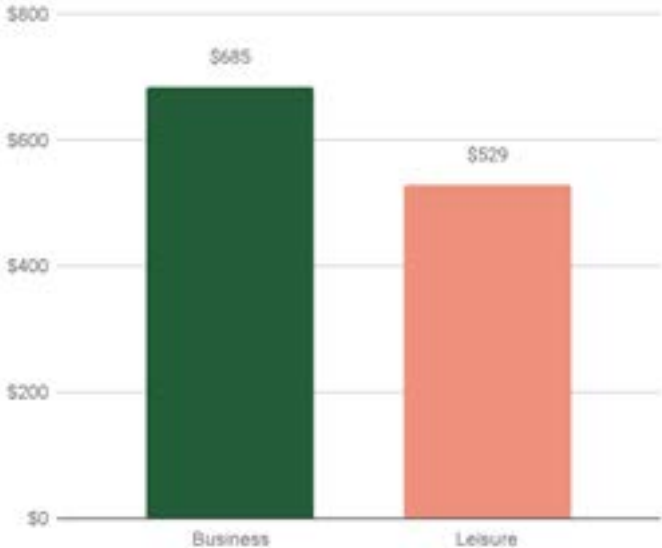
- Lodging | \$5,427 Million
- Transportation | \$1,555 Million
- Food & Beverage | \$3,244 Million
- Retail Purchase | \$2,056 Million
- Recreation/Entertainment | \$1,523 Million

2019 DOMESTIC OVERNIGHT EXPENDITURES

Average Per Person Expenditures on Domestic Overnight Trips - by Trip Purpose



Average Per Party Expenditures on Domestic Overnight Trips - by Trip Purpose



2019 DOMESTIC OVERNIGHT MAIN PURPOSE OF TRIP

TAKEAWAY:

Touring a destination is the main purpose of most travelers.



2019 DOMESTIC OVERNIGHT ORIGIN OF TRIP

(BY STATE)

TAKEAWAY:

Georgia's visitors come mostly from surrounding states.



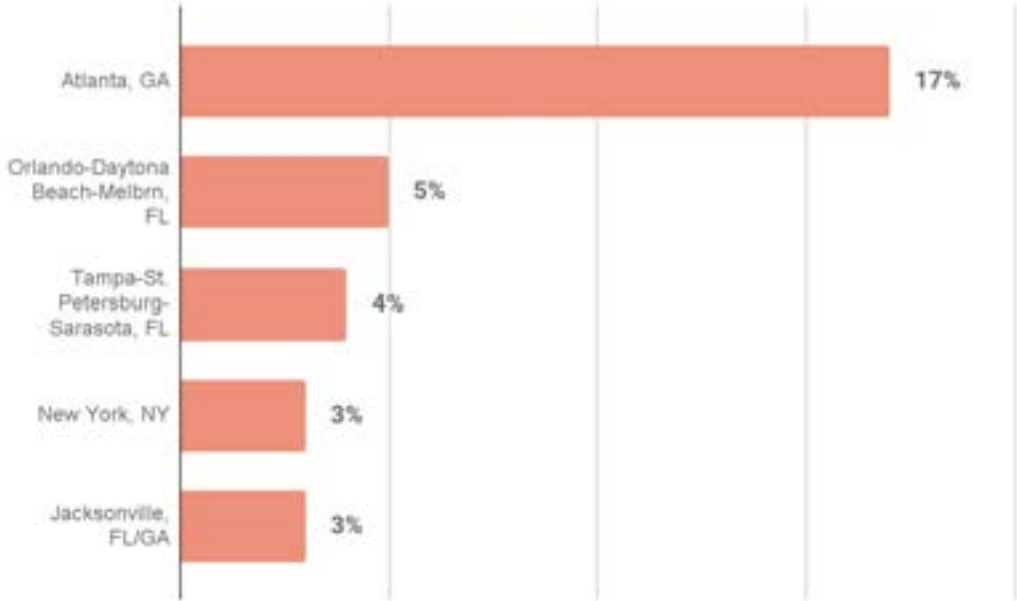
GEORGIA	FLORIDA	SOUTH CAROLINA	ALABAMA	TENNESSEE	NORTH CAROLINA
27%	18%	5%	5%	5%	5%

2019 DOMESTIC OVERNIGHT ORIGIN OF TRIP

(BY DMA)

TAKEAWAY:

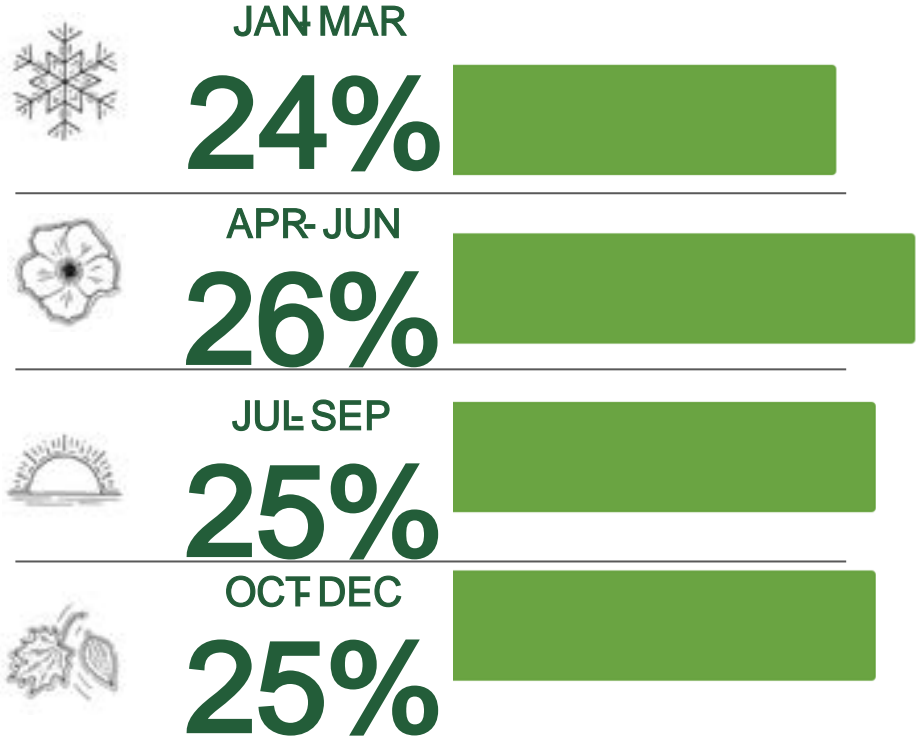
Atlanta is the No. 1 market for most Georgia destinations.



2019 DOMESTIC OVERNIGHT SEASON OF TRIP

TAKEAWAY:

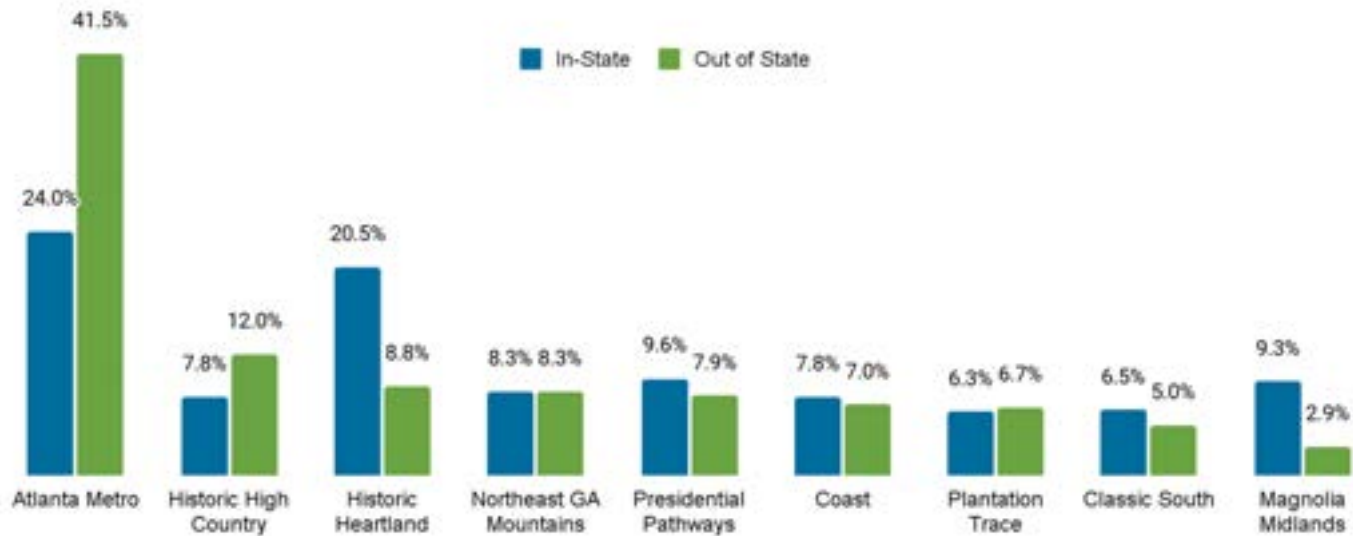
Georgia enjoys a unique seasonality pattern.



2019 VISITED REGIONS BY US TRAVELERS

TAKEAWAY

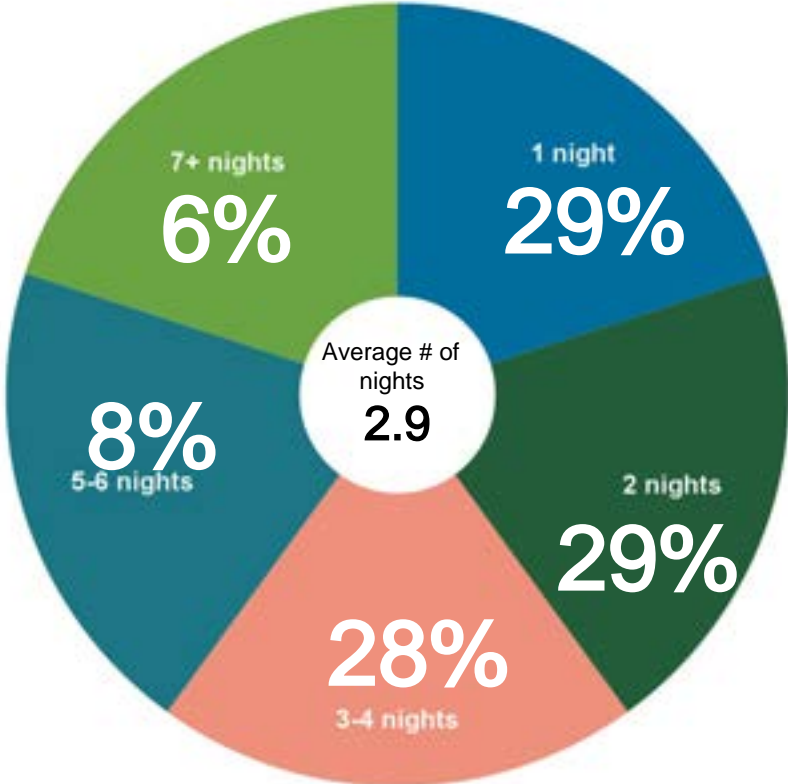
For visitors, there's Atlanta and the rest of Georgia.



2019 DOMESTIC NIGHTS SPENT IN GEORGIA

TAKEAWAY:

The average length-of-trip is approx. 3 nights...



2019 DOMESTIC OVERNIGHT SIZE OF TRAVEL PARTY

TAKEAWAY:

And the average party size is nearly 3 total.

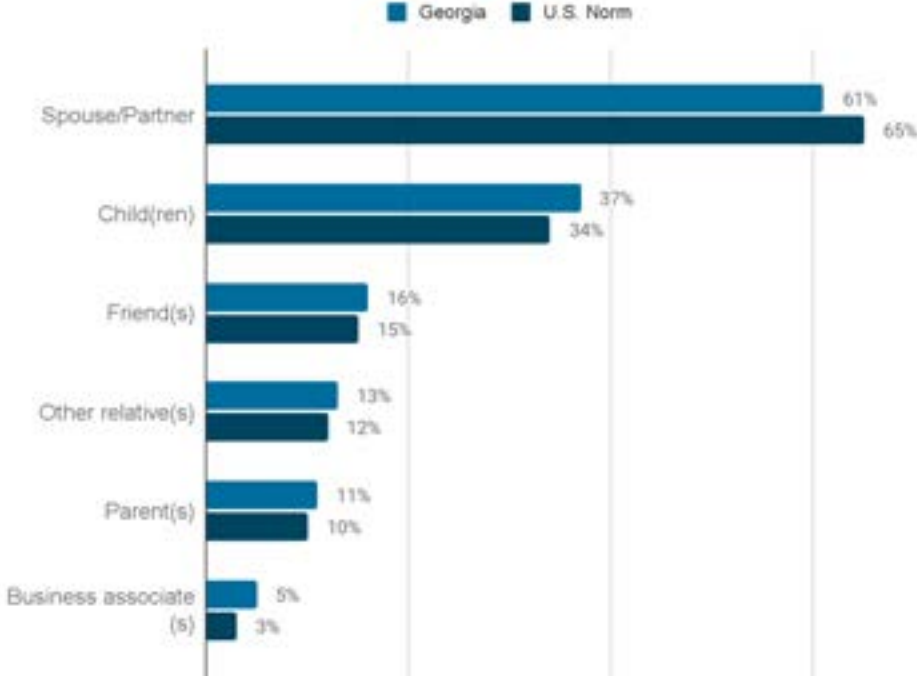


TOTAL
2.8

2019 DOMESTIC OVERNIGHT COMPOSITION OF TRAVEL PARTY

TAKEAWAY:

Georgia is largely visited by families.



2019 DOMESTIC OVERNIGHT PRIMARY METHOD OF TRANSPORTATION



OWN CAR/TRUCK



64% (U.S Norm: 61%)



PLANE



13% (U.S Norm: 17%)

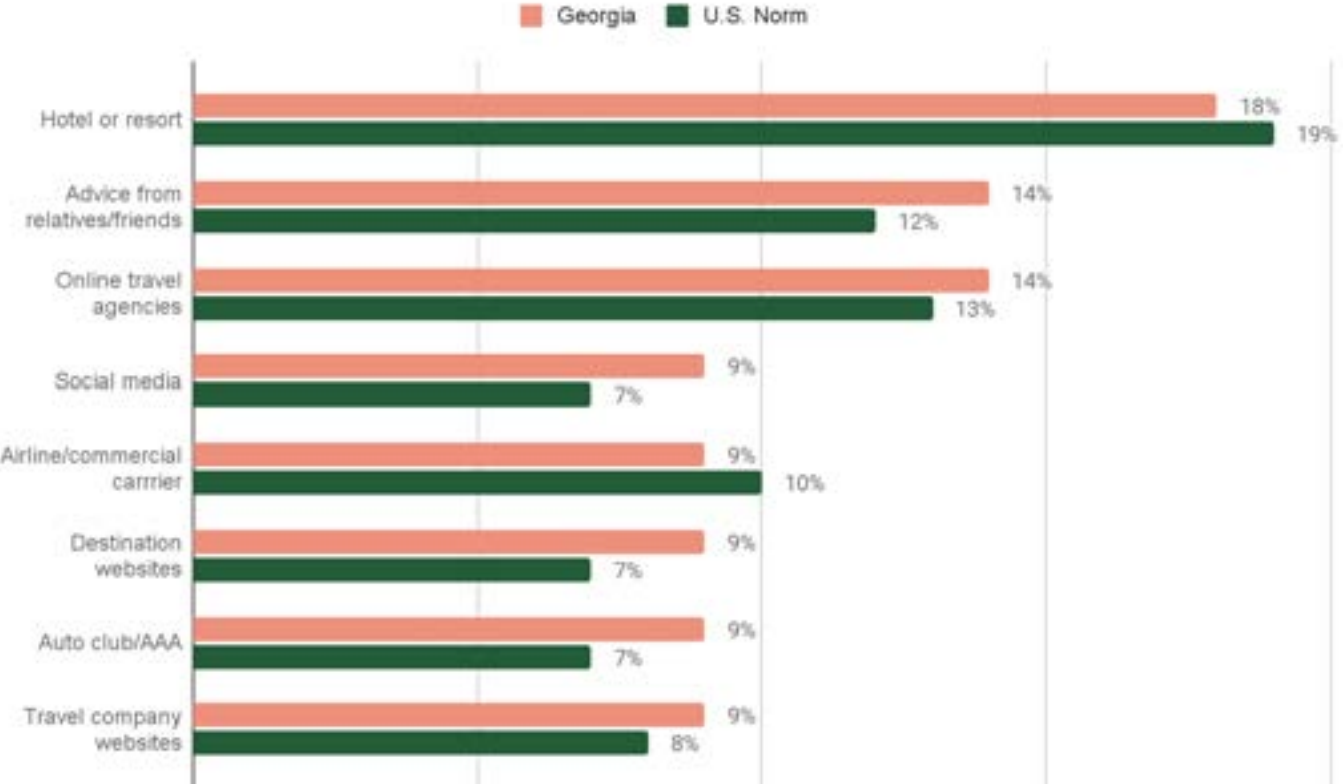


RENTAL CAR



12% (U.S Norm: 10%)

2019 DOMESTIC OVERNIGHT TRIP PLANNING INFORMATION SOURCES



2019 DOMESTIC OVERNIGHT LENGTH OF TRIP PLANNING










U.S. Norm

1 MONTH OR LESS	32%	33%
2 MONTHS	18%	17%
3-5 MONTHS	17%	18%
6- 12 MONTHS	13%	14%
MORE THAN 1 YEAR IN ADVANCE	4%	4%
DID NOT PLAN ANYTHING IN ADVANCE	16%	14%

2019 DOMESTIC OVERNIGHT ACCOMMODATION

TAKEAWAY:

















Most visitors stay in hotels.

	Georgia	U.S. Norm
 Home of friends or relatives	26%	22%
 Other hotel	26%	22%
 Motel	22%	16%
 Resort hotel	18%	23%
 Bed & breakfast	7%	5%
 Other	6%	5%
 Rented home / condo / apartment	6%	5%

2019 DOMESTIC OVERNIGHT TOP 10 ACTIVITIES & EXPERIENCES

SHOPPING U.S. NORM 29%	32%	MUSEUM U.S. NORM 10%	12%
LANDMARK/HISTORIC SITE U.S. NORM 12%	14%	NATIONAL/STATE PARK U.S. NORM 9%	10%
BAR/NIGHTCLUB U.S. NORM 14%	14%	BEACH/WATERFRONT U.S. NORM 13%	10%
FINE/UPSCALE DINING U.S. NORM 12%	12%	THEME PARK U.S. NORM 7%	7%
SWIMMING U.S. NORM 13%	12%	HIKING/BACKPACKING U.S. NORM 7%	7%

2019 DOMESTIC OVERNIGHT SATISFACTION WITH TRIP

	Overall trip experience		76%
	Friendliness of people		68%
	Quality of accomodations		66%
	Quality of food		65%
	Safety and security		61%
	Cleanliness		60%
	Sightseeing and attractions		56%
	Value for money		53%

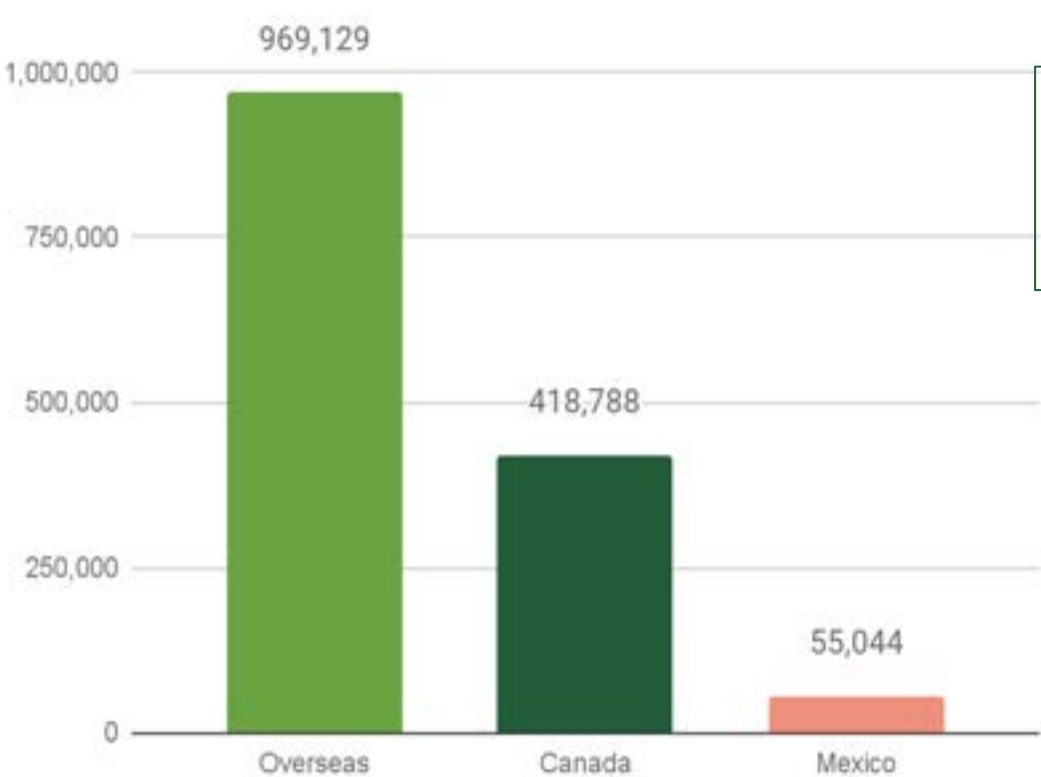
DIFFERENCES IN DAY TRIP VISITATIONS



DAY TRIPPER PROFILE

- Lower per person/party expenditure
- Higher % shopping and doing Outdoors
 - Lower for conventions
- Fewer hit the bars

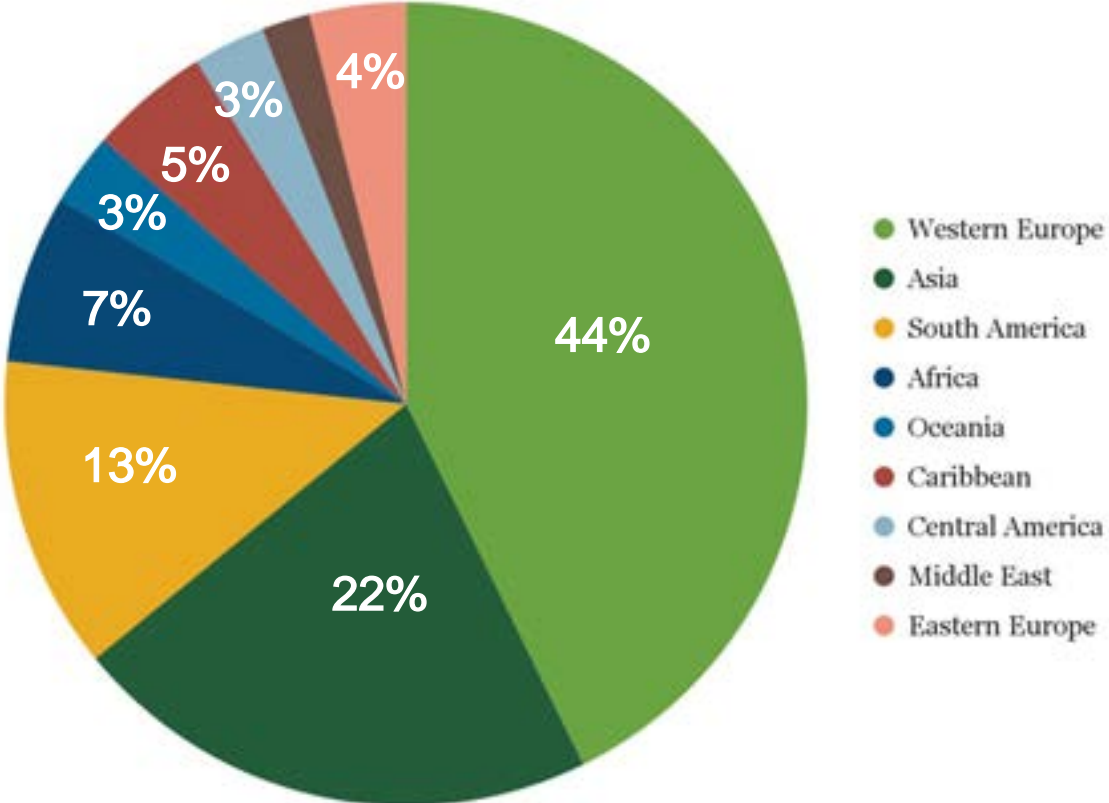
2019 INTERNATIONAL TO GEORGIA BY VISITOR BREAKDOWN



TAKEAWAY:

Overseas visitors make up the majority of international travelers to Georgia.

2019 OVERSEAS VISITATION BY SOURCE MARKET





Impact of COVID



IMPACT OF COVID ON U.S. TRAVEL



Prior to COVID, travel industry experienced **10 straight years** of growth.

Growth was due to strength of domestic leisure travel, domestic business travel and international inbound travel segments.

Travel represented **1 in 10 jobs** and generated travel trade surplus.

IMPACT OF COVID ON GEORGIA TRAVEL IN 2020



\$12 billion decrease in visitor spending

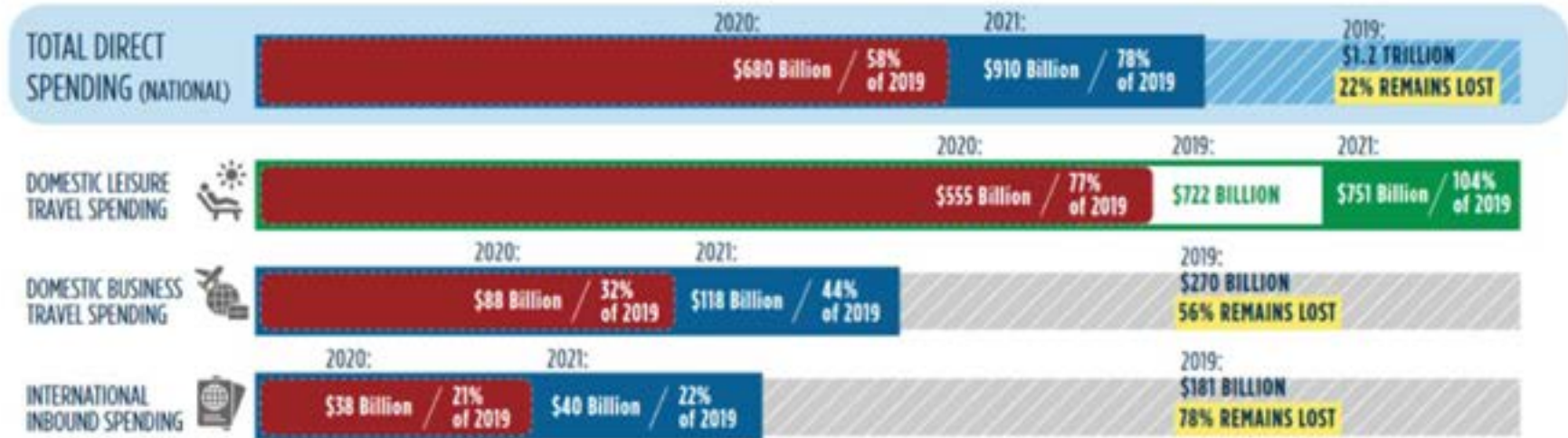
\$640 million down in travel-generated state & local tax revenues

82,400 jobs lost from March 2020 - December 2020

INCONSISTENT RECOVERY FROM COVID

\$755 BILLION

Total 2-year direct travel spending losses throughout the end of 2021



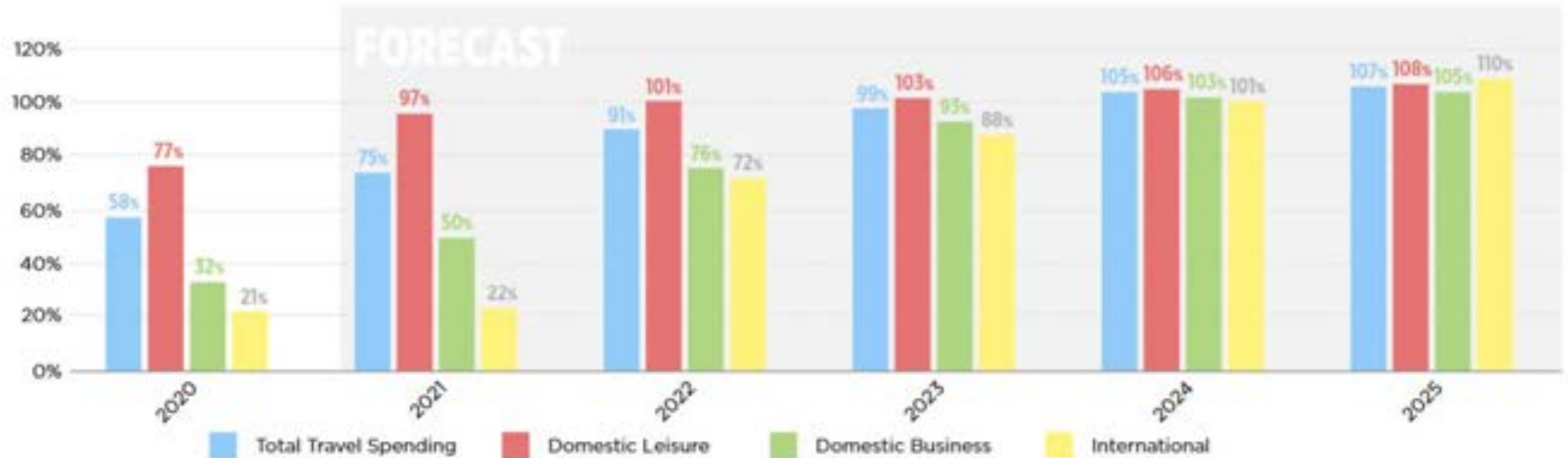


Future Forecast



FORECAST

FIGURE 4 – RECOVERY FORECAST FOR DOMESTIC AND INTERNATIONAL TRAVEL SPENDING
% CHANGE COMPARED TO SAME MONTH IN 2019





Our Strategic Focus

- Open new markets and segments
- Elevate Explore Georgia brand
- Invest in GA tourism industry



Open New Markets and Segments

- Invest in opportunity markets: distant metros & Canada
- Maximize overseas investments in Western Europe first
- Support key market segments underserved in the past
- Lend state resources to niche marketing programs and strengthen Georgia's travel brand with every visitor



Elevate Explore Georgia Brand

- Identify Georgia's unique personality and capture the essence of how visitors feel when they travel to or within the state
- Unite Georgia's diversity of experiences in a single, cohesive, consolidated expression and brand promise
- Prioritize budget toward advertising, promotion and top-of-mind awareness



Invest in GA Tourism Industry

- Develop variety of co-op marketing programs that elevate partners' own efforts and expands Georgia's overall market share
- Create greater convergence between print and digital planning tools
- Seek to add value to 'future of travel' initiatives

EXPLORE
GEORGIA.

REGIONAL
SERVICES MAP



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A family of three (two adults and a child) stands on a concrete ledge, looking out at a city skyline. In the background, a large Ferris wheel is visible, along with several modern and older buildings under a cloudy sky. The text 'EXPLORE GEORGIA' is overlaid in large white letters.

EXPLORE GEORGIA

[ExploreGeorgia.org](https://www.ExploreGeorgia.org)

Q&A