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FINAL REPORT OF THE SENATE STUDY COMMITTEE ON MAKING GEORGIA THE NO. 1 STATE FOR TOURISM (SR 323)

Committee Members

Senator Drew Echols, Chairman
District 49

Senator Frank Ginn
District 47

Senator Russ Goodman
District 8

Senator Sonya Halpern
District 39

Senator Emanuel Jones
District 10

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STUDY COMMITTEE CREATION, FOCUS, AND DUTIES

The Senate Study Committee on Making Georgia the No. 1 State for Tourism was created by Senate Resolution 323 during the 2025 Legislative Session of the Georgia General Assembly.¹ The Study Committee was tasked with discovering opportunities to promote and develop tourism in all regions of the state, from small towns to big cities, to ensure Georgia becomes the no. 1 state for tourism.

Senator Drew Echols of the 49th served as Chair of the Study Committee. Other Senate members included Senators Frank Ginn of the 47th, Russ Goodman of the 8th, Sonya Halpern of the 39th, and Emanuel Jones of the 10th.

The following legislative staff members were assigned to the Study Committee: Evan Bergwall, Senate Press Office; Hayley Williams, Senate Office of Policy and Legislative Analysis; Brenita Simmons, Office of Senator Drew Echols; and Ali Rad, Office of Legislative Counsel.

¹ S.R. 323, 158th Gen. Assemb., Reg. Sess. (Ga. 2025), <https://www.legis.ga.gov/legislation/71057>

BACKGROUND

This report contains data from various sources across the state and country. While tourism data varies according to methodology and values taken into account, the Governor annually releases official state data related to the tourism industry in Georgia. At the time of this report's filing, the most recently available tourism report was released in September 2025. The following infographic captures this year's highlights:



GEORGIA TOURISM BY THE NUMBERS: 2024

Breaking Records Once Again



MEETING 1

Date: August 14, 2025

Location: The Boathouse – Gainesville, GA

Topic: Introductory Meeting

Attendees and Speakers

Members: D. Echols (Chair); F. Ginn; S. Halpern; E. Jones; R. Goodman

Speakers: Matthew Boling (Lanier Islands Resort); Jay Markwalter (Explore Georgia); Jeff Payne (Capstone Property Group); Tyler Reinagel (CSG South)

Summary of Testimony

1. Matthew Boling (Lanier Islands Resort)

Mr. Boling shared some history and a general overview of Lanier Islands, its operations, and its role in local economic development. He explained the function of the local development authority, its privatization, and its contributions to the success of the property. Chairman Echols expressed his interest in the public private partnership and exploring the benefit of expanding that model throughout the state.

2. Jay Markwalter (Explore Georgia)

Mr. Markwalter told the committee about Explore Georgia's missions and functions. Explore Georgia is the tourism marketing and sales office within the Department of Economic Development, with several regional offices throughout the state focusing on local development projects. Mr. Markwalter shared Explore Georgia's philosophy, which encourages a view of tourists as temporary taxpayers.

Mr. Markwalter also shared figures related to the industry's economic impact in 2023, but informed the committee that updated data from 2024 would be available following the Governor's Conference in September of this year.² He highlighted some of Explore Georgia's marketing strategies, which include both digital and print campaigns. Explore Georgia advertises in print magazines distributed to visitor centers statewide, nationally, and in some cases, internationally. It also uses social media and other internet advertising.

Mr. Markwalter shared some of Explore Georgia's efforts to market Georgia for trade shows and other conventions. He gave an overview of the Sports Tourism Index, which is a tool provided to partners statewide to help attract and promote sporting events in their communities. Mr. Markwalter also told the committee about Explore Georgia's strategic marketing campaigns leading up to the FIFA World Cup, which will take place in Atlanta in 2026. These efforts include extensive marketing domestically and across the UK to showcase Georgia's attractions outside of Atlanta and encourage more tourism across the state from international visitors.

3. Jeff Payne (Capstone Property Group)

Mr. Payne gave a private sector perspective of the challenges and opportunities related to tourism and visitor infrastructure in Georgia. He shared some data related to rural versus urban tourism, both of which are driven largely by lodging and food and beverage sales. Urban tourism is also driven heavily by transportation, particularly surrounding Hartsfield Jackson.

Mr. Payne shared information about resources available to local governments to incentivize tourism, including TAD, PILOT, empowerment zones, state job tax credits, and federal opportunity zones. Many Georgia cities and counties are unaware of these resources.

² See *Background* section of this report for an infographic highlighting the updated tourism figures released during the Governor's Conference in September 2025.

Mr. Payne spoke to his experience working with Gainesville's local officials and CVB staff, which has been a significantly more efficient process than it has been in other areas with shortsighted planning and permitting processes.

Mr. Payne gave an overview of various historic tax credits available through state and federal programs. He shared examples of local improvement and development projects across the state which benefitted from historic tax credits, as well as future projects which will rely on the credits.

4. Tyler Reinagel (Council of State Governments, Southern Office)

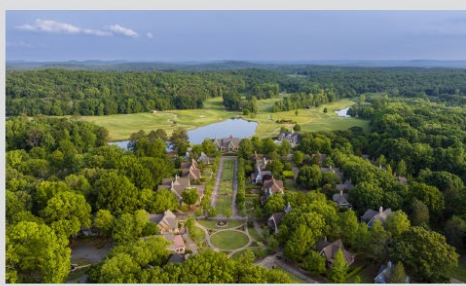
Mr. Reinagel shared data related to the return on investment for tourism spending in Georgia, which has proven a worthwhile investment for the state. National studies show that, on average, each dollar invested in tourism results in roughly \$122 in direct, indirect, and induced spending.

Return on Investment: Is Spending on Tourism Really Necessary?



- ❑ Job creation
 - ❑ Nearly 257K Georgia jobs are directly tied to the tourism industry
- ❑ Tax Relief for Residents
 - ❑ In addition direct spending at hotels, spending on dining, entertainment, and shopping drive LOST/SPLOST/ELOST revenues
 - ❑ \$35.4B in total tourism spending (2023) drives general fund state and local revenue
- ❑ Infrastructure Support

- ❑ Investments in tourism promotion yield demonstrable results
 - ❑ Studies indicate every \$1 invested in tourism promotion yield \$122 in direct, indirect, and induced spending benefits nationally
 - ❑ Similar studies indicate that every \$1 invested in tourism promotion generate an average of >\$8 in direct state/local tax revenue
 - ❑ Georgia-specific returns include nearly \$80B in economic impact and \$5B in state/local tax revenue



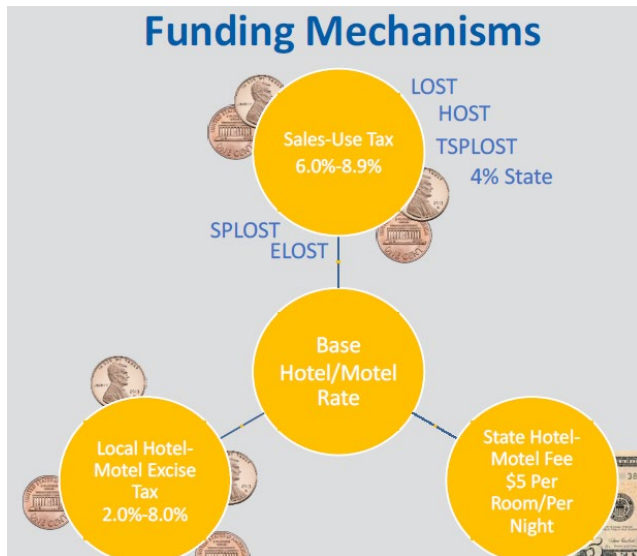
Several states, including Georgia, house their tourism offices within a state agency. Other states have an independent department. Texas has a tourism division within the Governor's office. Florida has a public-private partnership with a marketing corporation.

Organization of State Tourism Offices in the South



- ❑ Division of State Agency
 - ❑ Georgia (GDEcD), South Carolina (Department of Parks, Recreation, and Tourism), North Carolina (Department of Commerce), Louisiana (Department of Culture, Recreation, and Tourism),
- ❑ Independent/Stand-Alone State Department
 - ❑ Alabama Tourism Department, Tennessee Department of Tourist Development, Oklahoma Tourism and Recreation Department (inc. state parkland)
- ❑ Gubernatorial Office
 - ❑ Texas Economic Development and Tourism Office
- ❑ Public-Private Partnership
 - ❑ Visit Florida is a non-profit entity acting as state tourism office in partnership with state government

Funding Mechanisms



Mr. Reinagel discussed different taxes and fees on hotel/motel stays in Georgia and how that tax revenue is spent. Spending for the first 3% of locally-generated tourism dollars through taxes and fees is entirely unrestricted, while the remainder is restricted to tourism promotion and development.

Intent of Georgia's Locally-Generated Tourism Dollars

- ❑ First three percent (3%) collected are unrestricted, can be used by county/municipal governments for any legal purpose
- ❑ Any collections above 3% are restricted to tourism promotion and product development
- ❑ Promotional activities are conducted through contracts with destination marketing organizations - not directly by the local government
 - ❑ Ensures industry professionals are making informed investments and leaning into the visitor/tourism assets in their communities in the spirit of the law
- ❑ Product development includes brick-and-mortar tourism assets, ranging from stadiums and convention centers to wayfinding signage and trail networks

Mr. Reinagel shared trends related to tourism development across the south, particularly in revenue generation, investments, and policymaking. He also discussed the impact of COVID on the tourism industry and how it rebounded in the years following. He further highlighted vulnerabilities to consider when examining the tourism industry and its development, including inflation, remote work, and regional tourism competition.

Florida



- ❑ Stays of up to 6 months are subject to 7.0% state sales tax, plus up to 7.0% locally-imposed “bed tax”
 - ❑ Tourist Development Tax, Convention Development Tax, Tourist Impact Tax, Municipal Resort Tax
- ❑ Brick-and-mortar investment/debt service in convention centers, sports facilities (including spring training), and operational expenses
- ❑ “Promote and advertise tourism in the state of Florida”

South Carolina

- ❑ Above the state’s **6.0%** state sales tax, there is a statewide **2.0%** state accommodations tax
 - ❑ Redistributed back to local governments
 - ❑ Cap of \$25,000 to LG general fund
 - ❑ 30% restricted to tourism promotion
- ❑ In addition to state accommodations tax, county and municipal governments are able to adopt local accommodations taxes up to an aggregate **3.0%**
- ❑ Accommodations taxes are separate from **2.0%** local hospitality tax (not applicable on lodging)
 - ❑ Similar restrictions on local spending, tourism-centric or tourist-focused brick-and-mortar



North Carolina



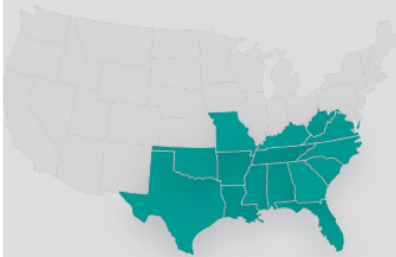
- ☐ No statewide lodging/hotel tax above the state's 4.75% (plus applicable local) sales/use taxes
- ☐ Local governments with authorizing legislation can collect up to 8%, though most outside Mecklenburg County collect 3%-6%
- ☐ Limits on usage are established through local legislation - only two jurisdictions are unrestricted, remaining ~200 are completely restricted to tourism-oriented activities
- ☐ Spending at discretion of "Tourism Development Authorities" - not city/county governing boards



SOUTH

THE COUNCIL OF STATE GOVERNMENTS SOUTHERN OFFICE

Themes Across the South



- ☐ State/Local Disparities
 - ☐ Empower local governments to collect and spend
- ☐ Focus on Driving Tourism
 - ☐ Funds collected locally are largely/completely restricted to investment in the tourism industry
- ☐ Building Brick-and-Mortar Visitor Assets
 - ☐ Conference/convention centers, amphitheaters, and sports facilities are treated as assets that meet the funding thresholds
- ☐ Local Control
 - ☐ Decisions about contracted DMOs, partnerships with nearby communities, and capital investments rest with local governing boards
- ☐ Empowering Industry Professionals
 - ☐ Widespread expectation that CVBs, Chambers of Commerce, and other tourism industry professionals are fulfilling the spirit of the law, rather than the local governments directly

5. Post-Meeting Considerations and Analysis (OPLA)

Throughout the meeting, committee members pressed for data related to the ROI for tourism spending in Georgia compared to other states, and where Georgia ranks in tourism investments relative to other states. Speakers consistently pointed to two factors which make it difficult to directly measure Georgia's tourism data against that of other states:

(1) Tourism is handled differently in every state, administratively and structurally.

Some states have an independently authorized tourism agency, while some states (including Georgia) house their tourism division within a state department. Moreover, among states with a tourism division within an existing state department, there is no consistency in terms of the department to which each division is attached, nor the relationship or shared responsibilities with other divisions or departments.

For example: **Explore Georgia** is the tourism division of the **Department of Economic Development**. Meanwhile, the **Parks and Historic Sites Division (PHSD)** of the **Department of Natural Resources** manages 63 state parks and historic sites, and serves more than 11 million people annually. However, according to representatives of each division, Explore Georgia and PHSD generally do not communicate or coordinate, nor are they statutorily required to do so.

Conversely, **South Carolina's** tourism division is housed within the **Department of Parks, Recreation, and Tourism**, and **Arkansas** has a tourism division within the **Department of Parks, Heritage, and Tourism**. In theory, the administrative proximity of the tourism and parks divisions in states like South Carolina and Arkansas would promote or require a stronger degree of coordination as it relates to the collection and publication of data.

(2) *States capture and track tourism spending and revenue data differently.*

Many states (including Georgia) only capture investments at the state level and do not record local tourism spending. Further, many states (such as Georgia) with options for local taxes that inherently rely on tourism, such as hotel/motel taxes, may or may not include such locally generated revenue in the state's overall tourism revenue data. There are numerous examples of seemingly minor variations in data collected and published among the states that result in substantial inconsistencies in their analyses.

As a result, it is difficult to make "apples-to-apples" comparisons of state tourism strategies and data.

MEETING 2

Date: September 24, 2025

Location: Savannah Convention Center – Savannah, GA

Topic: Return on Investment for Tourism Marketing; Workforce Development

Attendees and Speakers

Members: D. Echols (Chair); F. Ginn; S. Halpern; E. Jones (virtual); R. Goodman

Speakers & Panelists: Kelvin Moore (Savannah Convention Center); Joe Marinelli (Visit Savannah); Michael Owens (Tourism Leadership Council)

Summary of Testimony

1. Kelvin Moore (Savannah Convention Center)

Mr. Moore, General Manager at the Savannah Convention Center, shared information about the center's history and ongoing expansion efforts.

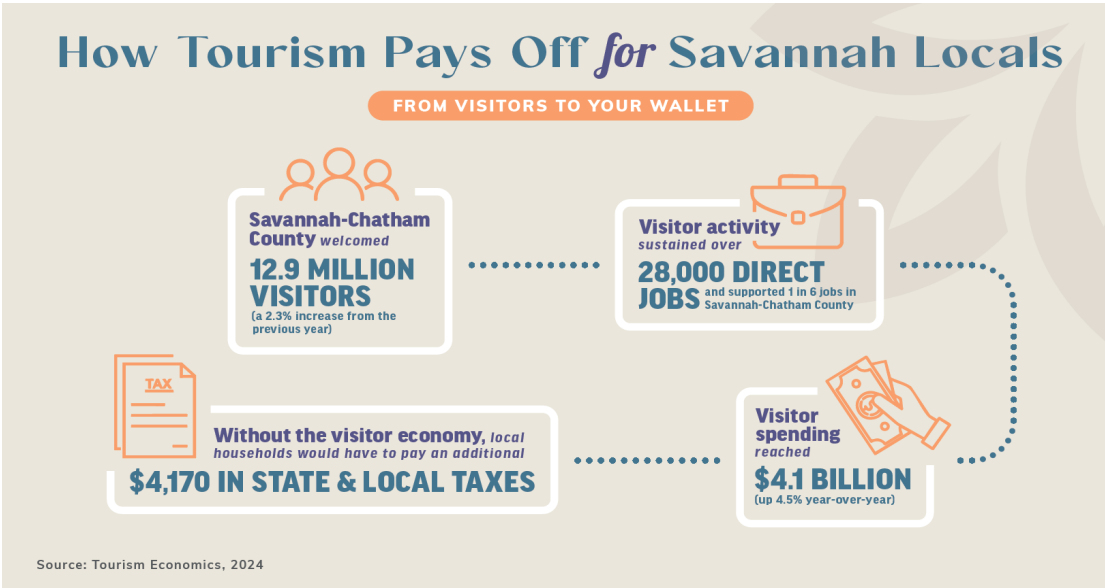
2. Joe Marinelli (President/CEO, Visit Savannah)

Mr. Marinelli, President and CEO of Visit Savannah, urged the committee to focus on two objectives to make Georgia's tourism industry thrive and compete among other states: (1) Developing a nationally recognized marketing campaign; and (2) Providing adequate funding.

Georgia's current statewide tourism budget falls far short of the nationwide average, which is roughly \$20 million. Some states invest on a much larger scale. California spends roughly \$120 million, while Florida spends around \$80 million. Recent efforts in West Virginia and Michigan were excellent case

studies for turning historically unpopular tourist destinations into major destinations as a result of creative and strategic marketing campaigns.³

Mr. Marinelli shared data related to the local economic impact of tourism and a comparison from 2011 and today. In 2011, the average consumer’s “path to purchase” a trip was around 10 touchpoints. Today, due to the volume of digital distractions, the average is 141 touchpoints. This emphasizes the importance of standing out among other tourist destinations.



Mr. Marinelli provided examples of Savannah’s brand partnerships with organizations like the Savannah Bananas and LoveShackFancy. He also spoke to the city’s national marketing campaigns with publications like Better Homes and Gardens, which are very costly, but consistently bring in results. He further shared the city’s efforts related to exhibition and convention centers. Mr. Marinelli concluded with examples of bold marketing campaigns in Michigan, West Virginia, and Louisiana.

BOLD CAMPAIGNS WITH PRICE TAGS

PURE MICHIGAN

Campaign launched in 2006, expanded nationally in 2009

Initial spend: \$5.6M
Peaked at \$40M annually

Proof: Nationally recognized, award-winning campaign that reshaped state tourism branding



WEST VIRGINIA “ALMOST HEAVEN”

Campaign launched in 2017, funding has since tripled

Current investment: \$49M annually

Proof: Significant funding growth demonstrates long-term commitment to tourism marketing



LOUISIANA SUPER BOWL AD

‘Year of Music’ campaign

Cost: \$500K placement (2024)



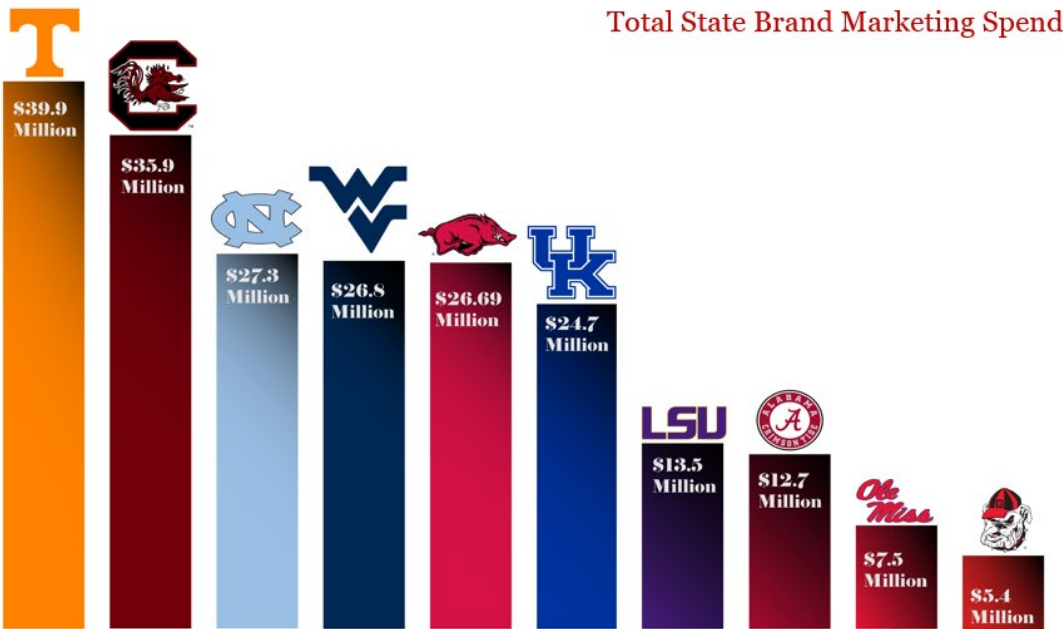
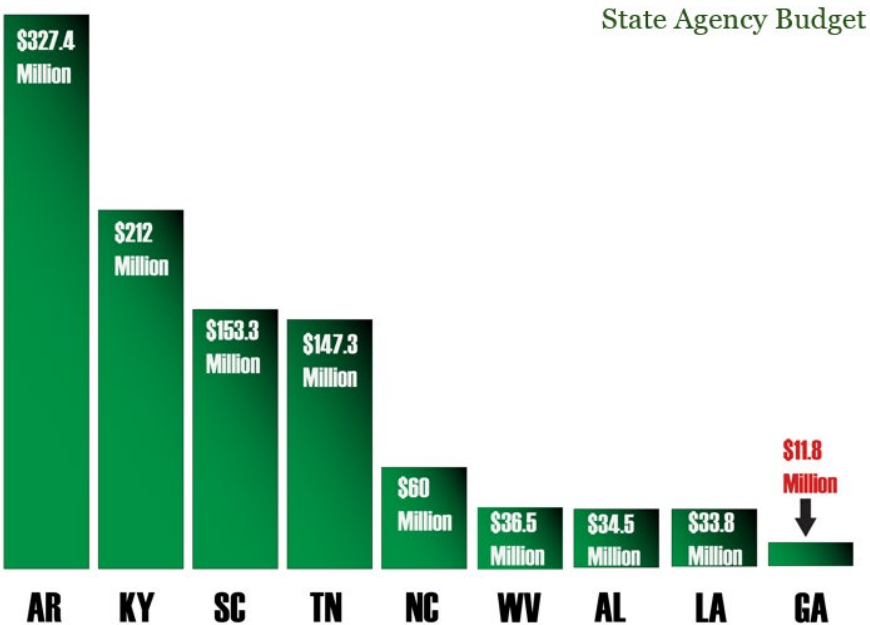
³ See *Meeting Four* for additional information regarding the case studies in Michigan and West Virginia.

Senator Halpern asked about Michigan’s marketing campaign and how it has been so successful. Mr. Marinelli stated that Visit Michigan is at least double the size of Explore Georgia and consistently goes above and beyond to stand out at exhibitions.

The committee and attendees discussed various matters related to specific local, regional, and national marketing campaigns, as well as international marketing campaigns to capitalize on the upcoming FIFA World Cup in 2026.

3. Michael Owens (Tourism Leadership Council

Mr. Owens, President and CEO of the Tourism Leadership Council, spoke to the importance of Georgia’s brand and willingness to meet the demands of tourists. Variation is important, but bolstering the “big” brand is essential. He described the tourism industry as a rivalry among states, and provided a breakdown of Georgia’s tourism spending relative to other states in the region.



Mr. Owens suggested that Georgia's budget should be around \$50 million. The state has a lot of "catching up" to do in order to equalize our standing with other states in the region and country. He also spoke to the massive tax revenues flowing into the state via tourism, which he asserts is the most heavily taxed industry in the state.

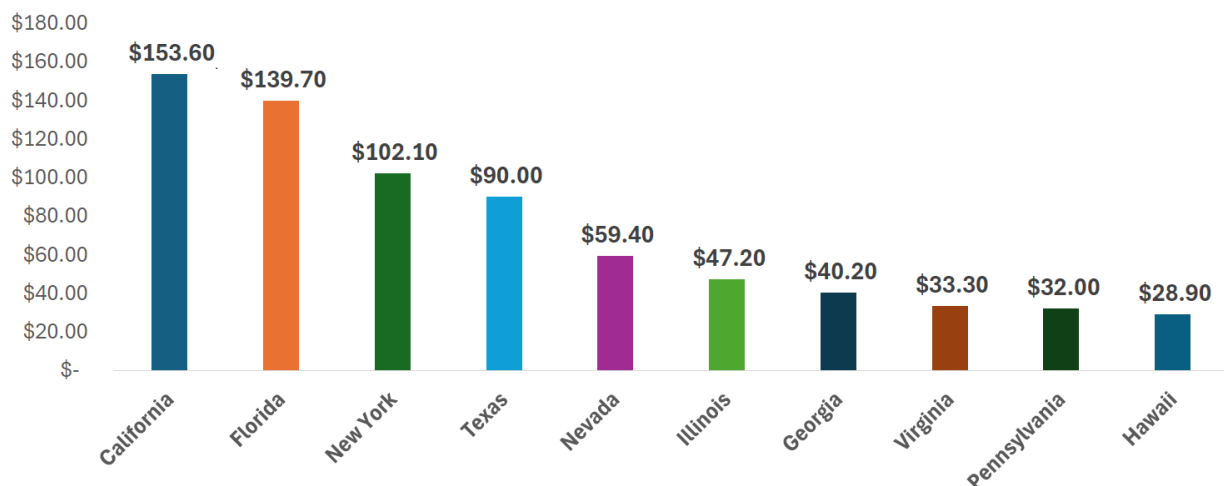
Finally, Mr. Owens emphasized the importance of every person involved in tourism and hospitality, emphasizing the need to support the "ladder of success" that inherently exists in the industry. Senator Ginn asked how much was generated by the \$5 hotel fee last year. It generated \$218 million in 2024. Mr. Owens pointed out that other segments of the industry account for the majority of tourism spending; last year, hotel spending represented 44% of the revenue from tourism spending. He suggested that it is inequitable to impose the fee on hotels and not attractions, food and beverage businesses, and so on.

Chairman Echols emphasized the fundamental factors to consider when determining how to best support the tourism industry: ROI and workforce development.

Senator Goodman pointed out the disparity between Georgia's spending and others. Mississippi has a population of only 3 million, but outspends Georgia on tourism marketing despite the fact that Georgia has a population of 11 million.

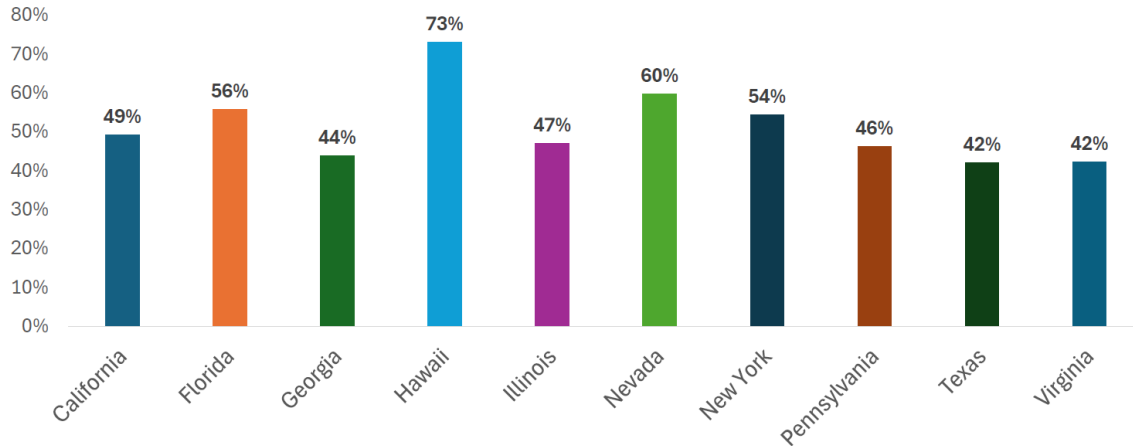
4. John Salazar (Department of Hospitality and Food Industry Management, University of Georgia)
Dr. Salazar presented on Georgia's hospitality and tourism economy. Generally, tourism is economically defined by lodging, food and beverage, and attractions. According to 2023 data, Georgia falls in the top 10 states for visitor spending.

Top 10 States for Visitor Spending (\$B): US Travel 2023



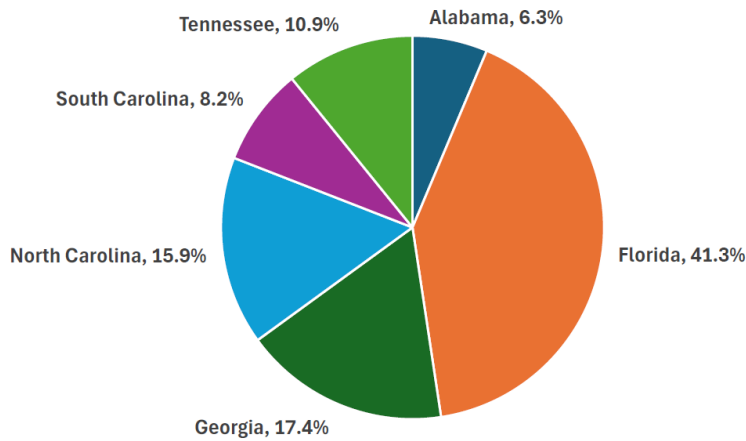
Georgia takes the second largest share of tourism spending in the southeast, behind Florida. Historically, Georgia and North Carolina have been very close in terms of tourism performance. Since 2020, Florida's share has increased while Georgia's and other states' shares have diminished.

% Growth Comparison by State: 2023 versus 2020 Tourism GDP



(UGA HFIM IMPLAN Analyses)

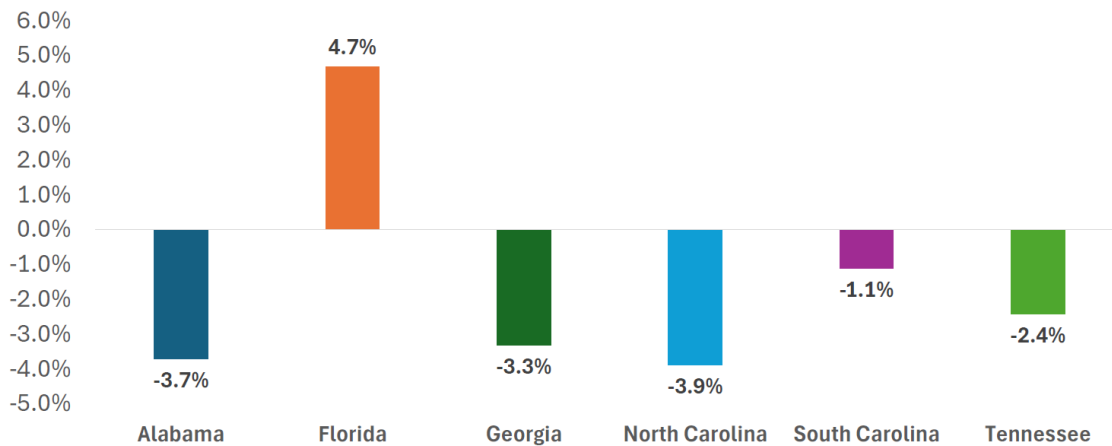
2023 Share of Regional Tourism GDP: AL, FL, GA, NC, SC, and TN



\$323.3 billion regional tourism economy

(UGA HFIM IMPLAN Analyses)

2023 versus 2020 % GDP Share Comparison: AL, FL, GA, NC, SC, and TN



(UGA HFIM IMPLAN Analyses)

Dr. Salazar shared data related to Georgia’s economy, with breakdowns of each industry’s firms, establishments, employment and payroll, and corresponding share of the state’s total receipts. He emphasized the importance of people in the industry, and noted the high rates of turnover within each segment of the industry. The hospitality industry faces higher rates of turnover than other industries. Dr. Salazar highlighted the importance of training and development in the hospitality industry and noted the number of high school students currently on a hospitality track through career academies.

Dr. Salazar presented a comparative analysis of the economic impact that various segments of the hospitality and tourism industry can have in various counties and regions.

Rural and Urban Comparisons

Category	Urban Average	Rural Average	Key Takeaway
Lodging	58.8%	42.2%	Urban regions dominate hotel supply.
Full-Service Restaurants	64.8%	37.1%	Dining infrastructure is urban-led.
Arts, Entertainment, & Recreation	48.6%	51.2%	Nearly balanced, rural slightly ahead.
Distilleries & Wineries	54.8%	45.7%	Urban advantage, but rural regions competitive.
Agriculture (All Ag)	38.5%	59.9%	Rural regions overwhelmingly lead.
USDA Agritourism	35.0%	28.3%	Urban/peri-urban counties show higher USDA agritourism presence.
Composite Score	50.1%	44.1%	Overall balance tilts slightly toward urban due to hospitality strengths.

(UGA HFIM/AEC IMPLAN and LQ Analyses) 18

Regional Comparisons

REGION	LODGING	RESTAURANTS	ARTS & ENT.	WINERIES	ALL AG	USDA AGRITOURISM	COMPOSITE
Atlanta Metro	79.3%	95.7%	35.3%	59.7%	18.5%	41.9%	55.1%
Central Georgia	48.3%	45.8%	48.7%	46.6%	50.7%	32.9%	45.5%
Coastal Georgia	46.0%	61.6%	44.5%	44.4%	40.2%	12.0%	41.5%
North Georgia	59.6%	66.7%	53.2%	65.3%	36.2%	39.3%	53.4%
South Georgia	41.4%	33.4%	52.7%	43.0%	65.6%	27.1%	43.9%

(UGA HFIM/AEC IMPLAN and LQ Analyses) 19

Dr. Salazar explained the revenue location quotient analysis and shared regional takeaways, cross-regional insights, and actionable strategies. Finally, Dr. Salazar gave an overview of UGA's efforts to lead the way for developing a stronger hospitality and tourism industry, including training and education programs, collaboration with local communities, and other initiatives.

Observations



Regional Takeaways

- Atlanta Metro: Lodging/Restaurants strong, Ag/Agritourism weak
- North GA: Wineries & Arts leader; weaker Ag
- Central GA: Balanced, needs lodging & F&B investment
- South GA: Agriculture powerhouse, hospitality gap
- Coastal GA: Hospitality-driven, agritourism absent

Cross-Regional Insights

- Urban = Hospitality hubs (lodging, dining)
- Rural = Agriculture anchors (farms, authentic experiences)
- No region dominates across all sectors → specialization & partnerships

Actionable Strategies

- Bundle Urban & Rural: Metro lodging + farm/winery trips
- Invest by Weakness: South/Central → hospitality; Metro/Coast → agritourism; North → wine & arts
- Targeted Marketing: Region-specific positioning

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Observations Continued...

Invest in Workforce Development for Hospitality & Tourism

- Launch statewide hospitality training programs in partnership with technical colleges and universities
- Provide retention incentives for employers (e.g., tax credits, grants for employee development)

Strengthen Statewide Branding

- Promote region-specific identities with a unified narrative
- Leverage partnerships between DMOs, hospitality brands, and rural producers

Policy & Funding

- Incentivize public-private partnerships to develop underperforming regions
- Expand state grants supporting agritourism development and rural hospitality startups



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5. Panel: Tourism Experts

Chairman Echols introduced the panel, consisting of Mr. Marinelli, Mr. Owens, and Mr. Bert Brantley, the President and CEO of the Savannah Chamber of Commerce.

Mr. Brantley provided examples of various development projects facilitated by private-public partnerships in Savannah. Mr. Marinelli explained that his organization operates differently now versus pre-Covid. The pandemic alerted the industry to its vulnerability despite its strength and resilience. It forced the industry to adapt to changing circumstances and demands. Mr. Owens pointed out that Georgia was the first state to reopen its doors to tourists, and the Governor's public invitation likely saved many businesses on the brink of collapse as the pandemic came to an end.

Mr. Owens also emphasized the importance of developing communities holistically rather than purely for tourism. Tourists desire cleanliness, safety, and strong infrastructure that people want from the communities they live in. Mr. Brantley echoed this sentiment, praising the state's efforts to make Georgia a great place to live, work, play, and thrive. Mr. Marinelli emphasized the safety aspect of local communities. Mr. Owens specifically suggested a change to the generic state license plate to advertise Explore Georgia's website. Chairman Echols asked if there is any dialogue among industry leaders and across regions. Mr. Owens suggested that the hospitality and tourism industry is likely one of the strongest in terms of communication and collaboration.

MEETING 3

Date: October 15, 2025

Location: Rainwater Convention Center – Valdosta, GA

Topic: Recreational Tourism

Attendees and Speakers

Members: D. Echols (Chair); S. Halpern; E. Jones (Virtual); R. Goodman; F. Ginn

Speakers & Panelists: Cheryl Smith (Georgia Department of Agriculture); Will Bentley (Georgia Agribusiness Council); Adam Bellflower (Georgia Farm Bureau); Mayor Scott Matheson (Valdosta); David DiSalvo (Visit Valdosta); Paul McNeal (Williams Hotel Group); Daniel Bayman (The McKey); Jason Van Nus (Lowndes County Schools); Valdosta State University; Sementha Methews (Turner Center for the Arts); Deputy Commissioner Trevor Santos (Georgia DNR); John Quarterman (Suwannee River); Matt Campbell (Entertainment Tourism Alliance of Georgia); Hayden Hancock (City of Nashville); Ronnie Dean (SGMC Health)

Summary of Testimony

1. Panel: Agritourism

- *Moderator:* Cheryl Smith (Georgia Department of Agriculture)
- Will Bentley (Georgia Agribusiness Council)
- Adam Bellflower (Georgia Farm Bureau)

Ms. Smith introduced the panelists. The Georgia Agribusiness Council is a trade association representing every sector of the agriculture industry in the state. Georgia Farm Bureau is a grassroots organization with roughly 230,000 members that supports farmers across the state. Agritourism operations are unique and vary widely in type, structure, and scale. There are many examples of large agritourism operations that employ dozens of people, and there are just as many examples of similar, smaller scale operations that employ a family or two. Agritourism is a proven way to keep family farms alive when they are unable to compete with large, corporate-backed farms. Larger economic impact studies have shown that agritourism has a multimillion-dollar impact in Southwest Georgia.

Agritourism operators face numerous regulatory barriers in Georgia. A significant issue is inconsistent permitting processes, which are often needlessly burdensome or confusing because local officials aren't always equipped to distinguish agritourism operations from other operations. Communication, coordination, and consistency are keys to ensuring that agritourism can flourish.

2. Mayor Scott Matheson & Chairman Bill Slaughter (Valdosta-Lowndes County)

Mayor Matheson spoke about developments in Valdosta over the past five years. Valdosta has an existing tourism sector and has identified it as a major opportunity for economic growth.

3. David DiSalvo (Visit Valdosta)

Mr. DiSalvo spoke about Valdosta's recent, ongoing, and future projects related to tourism. Valdosta is geographically positioned in a way that gives it an advantage for attracting regional events. Valdosta will seek state funding for a new convention center in the coming years. There is demonstrated interest in a convention center to service the region, including Jacksonville, FL, which does not have a large convention center either. However, in addition to funding, Mr. DiSalvo emphasized the importance of securing strong partnerships with state and local leaders.

4. Paul McNeal (Williams Hotel Group)

Mr. McNeal gave an overview of William Hotel Group's operations and spoke to the economic impact of lodging in South Georgia. One of the biggest challenges in the industry is the cost of insurance. Another challenge historically has been the cost of legal representation and proceedings, and until recently, the cost of verdicts in the state. Finally, Mr. McNeal asserted that the tax burden imposed on the hotel industry is inequitable relative to other businesses in the hospitality industry.

5. Daniel Bayman (The McKey)

Mr. Bayman echoed many of Mr. McNeal's remarks, and encouraged the state to consider Valdosta-Lowndes County as a southern partner in Georgia's tourism industry. Senator Halpern asked how much business is lost or missed out on as a result of not having a larger conference center, how much business would come in as a result of a larger convention center, and why the industry sees a significant weekend boost of tourism if not for a specific event in Valdosta. Mr. Bayman explained that many people consider Valdosta a convenient stop on the way to or from Florida, and many people attend events in nearby towns like Adel, but stay in Valdosta due to limited availability in Adel.

6. Jason Van Nus (Lowndes County Schools)

Mr. Van Nus, Director of Work-Based Learning & Youth Apprenticeship Program for Lowndes County Schools, spoke about the workforce element of tourism in South Georgia. Work-based learning should be seen as a legitimate tool for economic development via student and community growth.

2018-2025 LHW WBL:

- ☐ \$9.5 million in raw wages
- ☐ \$37.5 million in est. economic impact

Result in Rural areas:

- ☐ \$\$\$ circulating in our rural communities/economies
- ☐ spent in gas stations, restaurants, small businesses, etc.
- ☐ strengthening our workforce

Work-based learning placements in Valdosta include Rainwater Convention Center, Fancy Girl Farms, hotels, Wild Adventures, and more. This program builds the local workforce rather than waiting for outside investment and helps employers find labor without prohibitive costs.

7. Local Tourism Anchors in South Georgia

- John Fitzgibbons (Wild Adventures Theme Park / Herschend Family Entertainment)
- Kim Bednarek (Okefenokee Swamp Park Inc.)
- Luke Tilt (Valdosta Wake Compound)
- Trent Coggins (Recoil Trampoline Park)
- Raul Torres (South Georgia Motor Sports Park)

The committee heard about each park's operations, including recent and ongoing projects and economic impact.

8. Duke Guthrie, Doug Farwell, & Troy Katen (Valdosta State University)

The committee heard from Mr. Guthrie, Managing Director of Peach State Summer Theatre, Mr. Farwell, Executive Director of the Valdosta Symphony Orchestra, and Mr. Katen, Director of Athletics at Valdosta State University. Peach State Summer Theatre is a program that attracts participants and audiences from across the country. Performances are held on consecutive days and scheduled to encourage attendees to stay in local hotels. The program has operated successfully for over 30 years with a demonstrated economic impact on the local community.

The Valdosta Symphony Orchestra hires professional musicians from the 4-state region to play and mentor alongside VSU music students. This year, 186 professional musicians participated in the program, spending over \$30K at local hotels alone over a 3-day stay.

Finally, VSU's athletics program has seen steady growth, largely without the assistance of NIL funding. The program hosts dozens of camps and tournaments, which generate significant revenue. Athletes typically travel with 2-5 family members to these events, which generally leads to additional local spending. Each of VSU's programs presented to the committee emphasize engagement with the local community.

9. Sementha Mathews (Turner Center for the Arts)

Ms. Mathews told the committee about Turner Center for the Arts, an organization based in Valdosta that serves South Georgia and North Florida. The committee heard about the center's ongoing project, the Imagination Station, which is expected to nearly double the center's annual economic impact (currently \$1.8 million) and patronage when it opens. The arts contribute over a billion dollars into

Georgia's economy and should be embraced as a major industry. Ms. Mathews emphasized the importance of partnerships in the center's success.

10. Trevor Santos (Department of Natural Resources)

Mr. Santos, Deputy Commissioner of the Department of Natural Resources, spoke to the committee about recreational tourism in Georgia. In total, DNR manages roughly 1.2 million acres of public land and 16,000 miles of rivers and streams in Georgia. Every Georgian lives within an hour's drive of a Georgia park or historic site. Many state parks offer campsites or other accommodations, from cabins to yurts, which are also managed by DNR.

Mr. Santos shared data related to the economic impact of recreational agritourism in Georgia.

Coastal Tourism 2024 Economic Impact of Tourism in Georgia

2024 Economic Impacts of the Georgia Coastal Counties						
County	Total Spending	Direct Labor Income	Direct Employment	State & Local Taxes	Federal Taxes	State & Local Tax Savings
Brantley	\$ 7,120,000	\$ 1,483,000	69	\$ 430,000	\$ 340,000	\$ 63
Bryan	\$ 142,600,000	\$ 41,952,000	1,499	\$ 10,040,000	\$ 8,730,000	\$ 635
Camden	\$ 181,910,000	\$ 53,211,000	1,931	\$ 16,560,000	\$ 11,330,000	\$ 788
Charlton	\$ 6,770,000	\$ 1,870,000	69	\$ 430,000	\$ 400,000	\$ 105
Chatham	\$ 3,318,320,000	\$ 942,438,000	25,817	\$ 279,650,000	\$ 193,750,000	\$ 2,345
Effingham	\$ 31,600,000	\$ 5,161,000	213	\$ 1,740,000	\$ 1,130,000	\$ 74
Glynn	\$ 1,035,330,000	\$ 322,614,000	8,289	\$ 102,050,000	\$ 67,370,000	\$ 2,947
Liberty	\$ 145,390,000	\$ 37,488,000	1,552	\$ 11,170,000	\$ 8,010,000	\$ 477
Long	\$ 3,550,000	\$ 660,000	28	\$ 250,000	\$ 150,000	\$ 43
McIntosh	\$ 45,770,000	\$ 8,154,000	294	\$ 3,640,000	\$ 1,880,000	\$ 761
Wayne	\$ 38,970,000	\$ 8,177,000	374	\$ 2,770,000	\$ 1,800,000	\$ 251
Totals	\$ 4,957,330,000	\$ 1,423,208,000	40,135	\$ 428,730,000	\$ 294,890,000	\$ 8,490

Wildlife Resources Division: Hunting & Fishing License Revenue

Hunting License

- Resident
 - \$10,202,743.00
- Non-Resident
 - \$11,016,088.00
- Total
 - \$21,218,831.00

Fishing License

- Resident
 - \$12,993,555.00
- Non-Resident
 - \$3,546,540.00
- Total
 - \$16,540,095.00

Total

\$37,758,926.00

Number of individuals who held a hunting or fishing license by residency

Unique Hunters and Anglers	
All	1,333,790
Resident	1,143,412
Non-Resident	190,378



Case Study: Georgia Quail Lands Economic & Employment Impacts*

Thomas, Grady, & Brooks County	2013	2018	2023
Economic Impact on Local Economy	\$95 Million	\$122.7 Million	\$127.1 Million
Labor Income	\$33.1 Million	\$55.5 Million	\$45.1 Million
Number of Overnight Visitor Stays	N/A	4,280	5,799



*source: "Economic Impact of the Red Hills Region Quail Hunting Lands"
https://talltimbers.org/wp-content/uploads/2025/07/2025EconomicImpactBook_LowResolution.pdf

11. John Quarterman (WWALS Suwannee Riverkeeper)

Mr. Quarterman gave an overview of the river's current programs and economic impact. There are several successful annual events that facilitate community engagement and attract regional tourists. Mr. Quarterman highlighted some of the burdensome, outdated, and inconsistent regulations that collectively undermine the effort to increase agritourism in the state.

12. Matt Campbell (Entertainment Tourism Alliance of Georgia)

Mr. Campbell and other representatives of ETAG spoke to the entertainment tourism industry in Georgia. There are entire local subeconomies built around a movie or television show with a fanbase that is eager to travel and see where it was filmed.

13. Hayden Hancock (City of Nashville, Azalea Sprinter, Nashville Farmers Market)

Mr. Hancock gave an overview of two recent economic development projects in Nashville, which are demonstrative of the far-reaching economic impact that local and regional projects can have.

14. Ronnie Dean (SGMC Health)

Mr. Dean told the committee about SGMC Health, a leading regional hospital that has successfully attracted highly qualified doctors to provide care in South Georgia. SGMC anticipates that recruitment and retention will become increasingly difficult, just as it will nationwide, but has ideas for strategic expansion and development to ensure continued success. A primary goal is to establish a four-year medical school, which would create opportunities for a second phase of expansion across the board.

MEETING 4

Date: November 18, 2025

Location: EchoPark Speedway – Hampton, GA

Topic: Entertainment Tourism

Attendees and Speakers

Members: D. Echols (Chair); S. Halpern; E. Jones; R. Goodman; F. Ginn (Virtual)

Speakers & Panelists: Tim Zulawski (Arthur M. Blank Sports and Entertainment); Andrew Saltzman (Atlanta Hawks and State Farm Arena); Jennifer Mastin Giglio (Atlanta Braves); Brian Hudson (The Hudson Group); Gary Wheat (Visit Macon); Matt McClain (Trilith Live)

Summary of Testimony

The committee heard a brief presentation on youth sports tourism across the state. The committee then heard introductory remarks from Brandon Hutchison, General Manager, Echo Park Speedway.

1. Panel: Impact of Professional Sports

- *Moderator:* Nick Fernandez (Metro Atlanta Chamber)
- Tim Zulawski (Arthur M. Blank Sports and Entertainment)
- Andrew Saltzman (Atlanta Hawks and State Farm Arena)
- Jennifer Mastin Giglio (Atlanta Braves)

Each panelist shared information related to the operations at their respective venues and organizations. Sports tourism has a far-reaching economic impact, from generating thousands of part-time and full-time jobs to bolstering local and regional vendors across multiple industries and sectors. Sports tourism can have long-term impacts on infrastructure development and expansion. The panelists shared their experiences with unaffiliated development projects coming into surrounding areas specifically due to the proximity to their sporting venues and complexes. These venues regularly draw in international tourists, not only for events like the FIFA World Cup 2026, but for events like concerts and Monster Jam.

Senator Halpern asked the panelists if the state should consider any specific legislation to address concerns in the near or distant future in order to ensure continued success. Mr. Zulawski noted that many countries in the Middle East already have a huge amount of funding available for bidding on

events. Texas has a mechanism to secure and reassure the existence of funding for events like these. North Carolina dedicates a significant of its sports betting revenue to fund these ventures.

Senator Goodman asked if Georgia's farmers could participate in the expansion of sports tourism, such as entering partnerships for food services. The panelists explained that large vendors like Cisco, Kroger, and Walmart almost always approach venues proactively to bid for contracts associated with large events. It would likely be helpful to improve communication and coordination among local farmers. Another helpful measure would be state-funded incentives for venues and complexes to prioritize contracts with Georgia vendors.

2. Panel: Georgia Music Industry

- *Moderator:* Mala Sharma (Georgia Music Partners)
- Brian Hudson (The Hudson Group)
- Gary Wheat (Visit Macon)
- Matt McClain (Trilith Live)

Ms. Sharma introduced the panelists, sharing data related to the economic impact of the music industry in Georgia. Over a billion dollars has been invested in the music industry and contributed to local economies and infrastructure over the past few years.

Each panelist shared their own insight on the music industry and music tourism in the state. Georgia is somewhat unique to have multiple large cities, in geographically distinct areas of the state, that attract different types of events and appeal to different types of tourists. While many people are familiar with large venues like State Farm and Lakewood, there are countless smaller venues across the state. For example, there are several dedicated concert venues in Athens. There are also multipurpose venues that host concerts regularly, such as Georgia Theatre, and nontraditional venues like Sanford Stadium are occasionally used as concert venues as well. The panelists spoke to the increase in the number of live music events that are being scheduled all over the state and country.

Mr. McClain spoke to the development of Trilith Live, a project in Fayetteville which is the result of a massive private investment effort. The venue is primarily used for rehearsal space for major headliners who come to perform at regional arenas in Atlanta. These arenas and other major venues are regularly unable to accommodate rehearsal space in advance of a concert because there are other events scheduled in the days and weeks ahead of the concert.

According to Mr. McClain, many of the jobs created by the film industry in Georgia have left the state due to the loss of tax incentives here or due to the availability of more favorable incentives elsewhere. The music industry, including music tourism, could easily replace some of those jobs and bring in additional jobs with the appropriate state funding and coordination. Pennsylvania has a fairly large incentive which helps the state attract new businesses, events, and projects. Texas has had an incentive for over 30 years which has helped the industry in the state tremendously. Mr. Hudson stated that Georgia's Department of Economic Development has done an excellent job with the film industry, but has failed to adequately support the music industry. The bill to create the Statewide Music Office, which was introduced by Senator Halpern, passed the Senate unanimously during the 2025 session but has not seen movement in the House. The panelists encouraged the legislature to push that bill through.

Senator Goodman noted the fact that Atlanta, which is arguably the music capital of the state, does not have a music district like that of other cities like Memphis or Nashville. Ms. Sharma stated that the development of a music district is desired, but cost prohibitive in Atlanta. Intentional music districts would likely see more success in cities like Athens or Augusta, where downtown revitalization efforts are already underway.

3. George Zimmerman (Longwoods International)

Mr. Zimmerman spoke about case studies on tourism marketing strategies and campaigns in Michigan and West Virginia. In 2004, Michigan performed its first ROI analysis on tourism marketing. Michigan spent \$3.5 million on tourism marketing in 2005, and during the following fiscal year saw 990,000 visitors spend \$164 million. From there, the budget increased and programs expanded.

Marketing efforts ranged from national TV ad campaigns, to advertisements in local grocery stores, to collaborations with Ford Motor Company for a Michigan branded pickup truck. From 2006-2016, the Pure Michigan campaign generated 32 million out-of-state trips, \$9.5 billion spent by visitors at Michigan businesses, and \$664 million paid in Michigan taxes, primarily sales tax. West Virginia has implemented similar campaigns and seen success. Mr. Zimmerman recommended the following: Invest in an agency capable of building Georgia's brand. Create a dedicated, substantial funding stream for that purpose; specifically, consider diverting a portion of the statewide nightly hotel/motel fees. Chairman Echols asked Mr. Zimmerman to explain the structure of the tourism agencies in Michigan and West Virginia. Michigan's tourism office is housed within the Department of Economic Development, while West Virginia elevated their tourism office to a cabinet level agency.

4. William Pate (Atlanta CVB)

Mr. Pate shared data related to tourism spending and revenue in Atlanta. With the exception of years affected by COVID-19, visitor spending in Atlanta has increased annually since 2009. He highlighted some of the economic impacts made by tourism over the years. More than 40 hotels representing 8,000 rooms have opened in Atlanta since 2008. Increased visitation has led to the development of additional attractions and venues. There has also been an increase in the number of major sporting events held in Atlanta.

5. Kevin Duvall & Lindsay Strickland (Georgia World Congress Center)

Mr. Duvall, CEO, and Ms. Strickland, VP of Government Affairs, testified to the committee regarding tourism and the Georgia World Congress Center (GWCC). The committee heard a brief history of the GWCC Authority and an overview of its operations. Ms. Strickland noted that GWCC's economic reach extends as far as the Okefenokee Swamp. Mr. Duvall highlighted some of the major renovations to comparable centers in other states, which will come into play in the immediate future as the landscape becomes increasingly competitive for securing major events. The workforce and infrastructure are both major challenges to continued success.

6. Panel: Atlanta Hoteliers

- *Moderator:* Chris Hardman (GHLA)
- Ramon Reyes (Omni Atlanta Hotel at Centennial Olympic Park)
- Roger Fleming (Marriott Atlanta NW / SpringHill Suites Atlanta NW – Concord Hospitality)
- James Green (Trilith Guesthouse)
- Ivy Mpofu (Legacy Ventures Hotels)

Mr. Hardman introduced the panel and stated that Georgia hotels are the most heavily taxed in the nation, yet receive the least funding support for the state. The panelists each spoke to challenges and opportunities related to tourism in the hotel industry. The panelists offered a variety of perspectives on these issues; Marriott Atlanta NW has been operating for over 40 years, while the Trilith Guesthouse opened approximately 18 months ago. COVID-19 fundamentally changed the hotel industry. Prior to the pandemic, there was a 70-30 split between business and leisure travelers. When the pandemic hit, business travel plummeted and has never fully returned to pre-pandemic levels. There has been a shift to focus on bolstering leisure travel to make up for the lost business travel.

There is a major opportunity for marketing internationally. Although millions may travel to the United States for the World Cup next year, the majority may not consider a stop in Georgia because

they are already familiar with other internationally mainstream destinations like New York, Las Vegas, and Florida, and there is no active marketing campaign to spread awareness to prospective travelers.

Each hotelier indicated that any additional tax on their industry would detrimentally impact their ability to attract travelers. For example, at Trilith Guesthouse, travelers are subject to 8.9% sales tax (state & local), 8% hotel/motel tax (local), and a \$5 flat fee (state). Total taxes imposed vary according to local rates and options, so the taxes and fees paid by a traveler in Fayetteville will vary significantly from a traveler in Pooler.

The panelists also spoke about their concerns and unique perspectives on safety and security. There is a particular interest in strengthening anti-human trafficking measures prior to the FIFA World Cup 2026. Most, if not all, of Georgia's major hotels have self-imposed and self-enforced protocols to aid in the prevention of human trafficking.

MEETING 5

The committee met to discuss and adopt this report on **November 21, 2025**.

Members present included Chairman Drew Echols, Senator Frank Ginn, Senator Russ Goodman (Virtual), Senator Sonya Halpern (Virtual), and Senator Emanuel Jones (Virtual).

FINDINGS AND RECOMMENDATIONS

Study Committee Findings

Members of the committee agree that Georgia's tourism industry requires dedicated and substantially increased funding. When tourists come to Georgia for specific events, the goal should be to keep them in Georgia and encourage them to see beyond their specific destination. The committee heard extensive, valuable testimony from across the state. This important topic warrants further study, as tourism could be the industry to elevate Georgia's economy to a new level.

Recommendations Received by Study Committee

The following is a summary of the key recommendations offered by stakeholders, committee witnesses, members of the public, and study committee members:

Workforce Development

1. State policy should support the "ladder of success" in the tourism and hospitality industry (i.e., incentivize employers to create opportunities for employees to start as housekeepers or line cooks and work their way up to management roles). Such policies should also seek to address high rates of employee turnover in hospitality.
2. The state should promote innovative programs like work-based learning to serve the tourism industry rather than waiting for outside investment.

Fiscal and Economic Impact of Tourism

1. The General Assembly should consider reforms to "tourism taxes," including both the state and local portions of the hotel-motel excise tax. Such reforms should bring clarity to the obligation to collect such taxes as well as boosting the economic and fiscal impact of tourism by shifting more of the state and local tax burden to visitors to our state.
2. The State of Georgia should legalize mobile sports betting.
3. State and local governments should consider investing in major convention center renovations or expansions to compete with recent renovations by some of our major competitors.

Coordination and Investment in Tourism

1. State agencies should educate and consult with local governments on tourism resources and incentives available to all communities.
2. The state should continue to support high growth regions and invest in critical infrastructure in those areas as part of an overall economic development strategy and in an effort to grow the tourism industry in such areas.
3. Tourism leaders should foster communication between farmers and event venues.
4. The General Assembly should explore state-backed incentives for events and venues to prioritize contracts with Georgia farmers and other vendors.

5. State policy should focus on developing communities holistically rather than purely for tourism (tourists desire the same cleanliness, safety, and strong infrastructure that people want from the communities they live in).
6. The General Assembly should make investments in tourism that are comparable to those made by competing states.
7. The state should create a more consistent and clear permitting system for agritourism operations (agritourism operations are frequently misidentified as general agriculture operations). This may also require cultivating stronger relationships between state tourism offices and local leaders.
8. The General Assembly should consider legislation creating a Statewide Music Office.
9. The state should continue working to improve Georgia's brand as a destination for tourism, including through nationwide and international marketing.
10. The General Assembly should continue to explore ways to strengthen anti-human trafficking laws and enhance penalties for trafficking, as Georgia continues its planning for major sporting events.

Respectfully Submitted,

**FINAL REPORT OF THE SENATE STUDY COMMITTEE ON
MAKING GEORGIA THE NO. 1 STATE FOR TOURISM
(SR 323)**



Senator Drew Echols – Committee Chairman
District 49