

Tourism Management Forum



City of Charleston



AGENDA

- Welcome and Introduction of Panel
- 2014 Tourism Management Plan Update and Overview of the Tourism Industry
- Tourism Management in Charleston
- Questions for the Panel
- Breakout Sessions on Issues and Solutions
- Concluding Remarks and Next Steps

Tourism Management Panel

Kitty Robinson

Historic Charleston Foundation

Tim Keane

City of Charleston- Planning, Preservation & Sustainability

Vanessa Turner Maybank

City of Charleston- Tourism Management

Bing Pan

College of Charleston

2014 Tourism Management Plan Update



You call it a
crazy night out.
We call it
Tuesday.

...that's
SAVANNAH
-EST. 1733



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on Broughton St.

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2014 Tourism Management Plan Update

1. Establish Steering Committee and
Involve all Citizens

2. Determine the Vision and Identify Key
Issues to Study

3. Establish Focus Groups to Work on Key
Issues and Do Research

4. Prepare Recommendations for
Presentation to City Council



TOURISM MANAGEMENT PLAN
City of Charleston



**1998 TOURISM MANAGEMENT
PLAN UPDATE**
City of Charleston

SUMMARY REPORT



**Tourism Impact and Management Study
CHARLESTON, SOUTH CAROLINA**





Charleston Visitor Center

Welcome to Charleston,
The Historic South Carolina
Beachfront City. Enjoy the
beaches, historic sites, and
cultural attractions of the
Lowcountry. We're glad to
have you here. Visit our
website at www.charleston.com for more
information about your stay in
Charleston.

 Handicapped Access on Other Side 



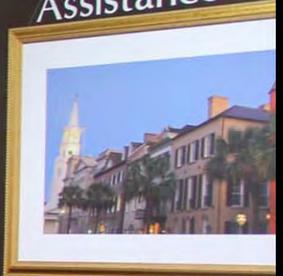
Lodging Assistance

Transportation & Visitor Information

Transportation & Visitor Information

Transportation & Visitor Information

Transportation & Visitor Information



We can help you, we speak Charleston.

EXIT PLEASE DO NOT ENTER



RIDE
THE
TROLLEY

FREE

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THE MOST CONVENIENT WAY TO SEE
CHARLESTON

Advisory Committee Members

Liz Alston

Carl Borick

Alphonso Brown

Betsy Cahill

Anne Bowen Dabney

Angela Black Drake

Dick Elliott

Carol Etheridge

Steve Gates

William (Lee) Gilliard

Randall Goldman

Jonathan Green

Helen Hill

Jane Jilich

Steve Litvin

Louise Maybank

Rick Mosteller

Vangie Rainsford

Charles Rhoden

Mayor Joseph P. Riley, Jr.

Kitty Robinson (Chair)

Nancye Starnes

Dennis Stiles

The Honorable Keith Waring





Vision Statement

The Tourism Advisory committee will develop objectives and recommendations within the next nine months that address the goal of maintaining the critical and delicate balance between Charleston's residential quality of life and the tourism economy while preserving Charleston's authenticity and sense of place, especially its architectural and cultural heritage.

RESOURCES

College of Charleston

Office of Tourism Analysis, Department of Hospitality
and Tourism Management

Joseph P. Riley Jr. Center for Livable Communities

City of Charleston Departments

Planning, Preservation & Sustainability

Tourism Management

Police

Traffic and Transportation

Recreation

Parks

COLLEGE *of*
CHARLESTON

An Overview of the Tourism Industry in Charleston

February 18, 2014



Bing Pan, Ph.D.

Office of Tourism Analysis, Department of Hospitality and Tourism Management

School of Business, College of Charleston

Presentation to Tourism Planning Advisory Committee, City of Charleston

Who are Charleston Visitors?

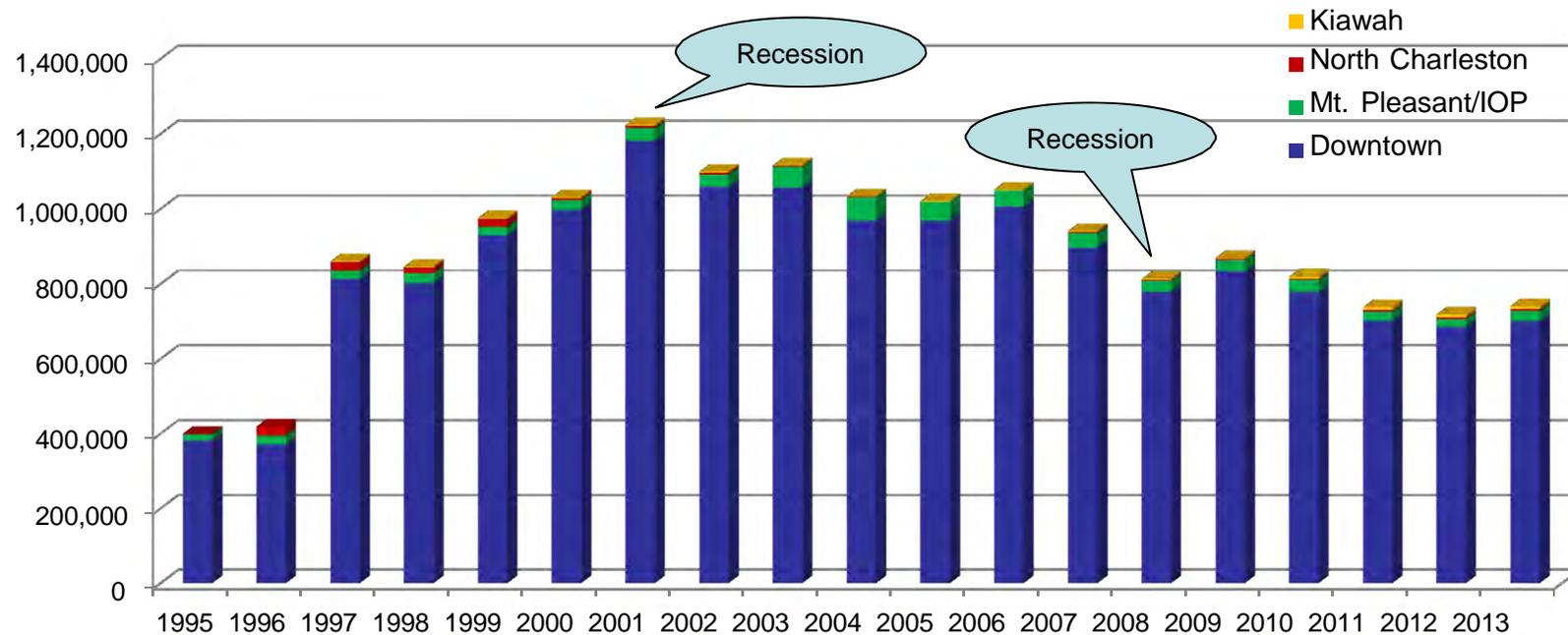
- Average age 51-52, full-time employed (49.5%) or retired (18.8%) in 2011
- Mainly from SC, NC, VA, GA, OH, and FL
- 5-7% from international locations
- Main metropolitan areas: NYC, DC, Charlotte, Atlanta, Raleigh, Columbia, and Chicago
- Percentage of visitors from farther away increased in recent years
- Arrive mainly by auto (71.0%) and airplane (22.3%) in 2011

Data source: Office of Tourism Analysis, College of Charleston

Indicators of the Tourism Industry

- Behavioral Indicators
 - Foot traffic, attendance, cars, passenger count, space rental, web traffic
- Financial Indicators
 - Taxes, revenue
- Supply Indicators
 - Hotel inventory

Downtown Visitor Center Traffic

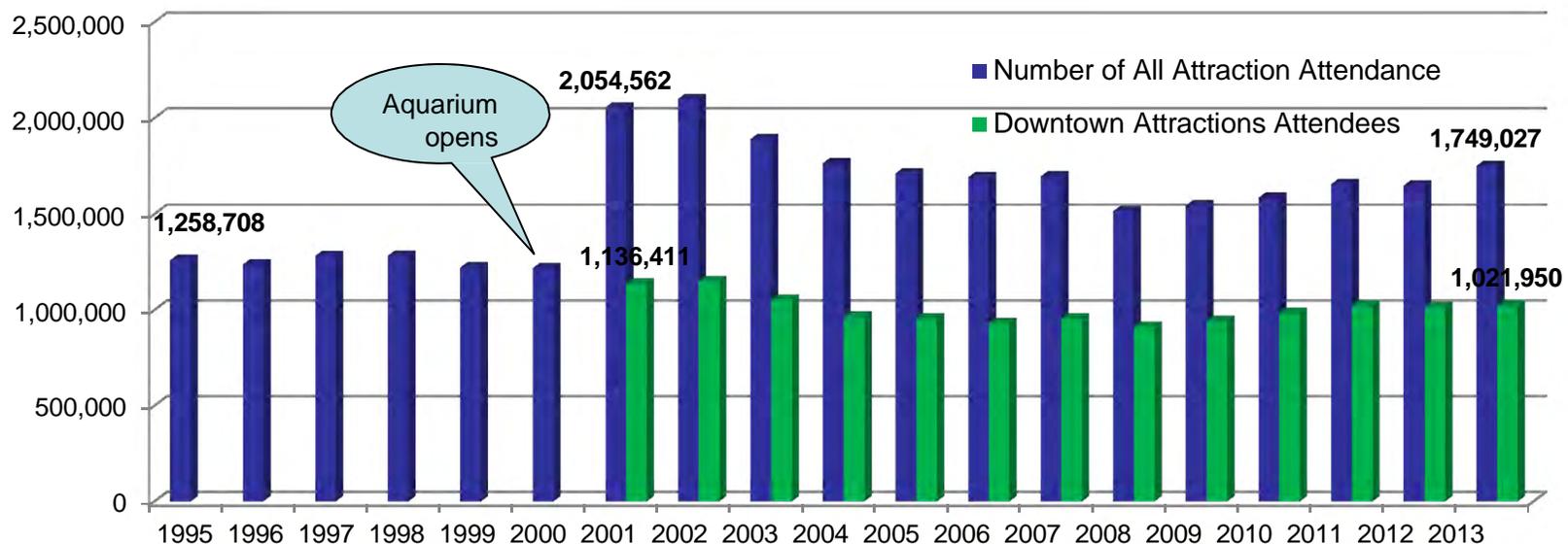


2001-2013: 39.4% decrease

Data Source: Charleston Area Convention and Visitors Bureau

Attraction Attendance Trends

(16 Attractions)



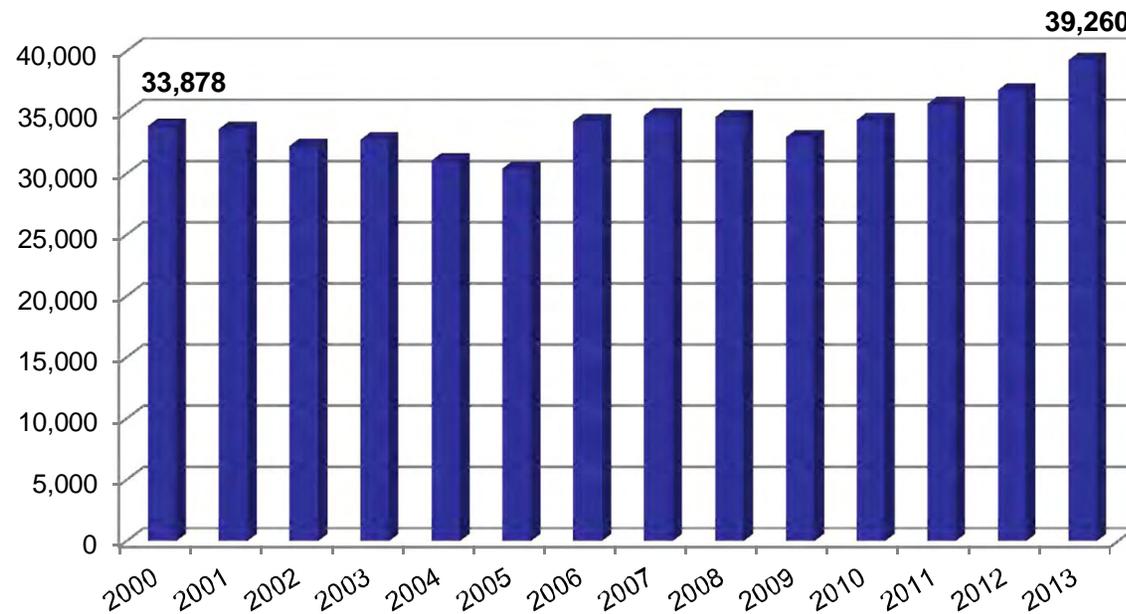
2001-2013: 14.9% decrease

2008-2013: 15.5% increase

Data Source: The Chamber of Commerce

Downtown Carriage Tours

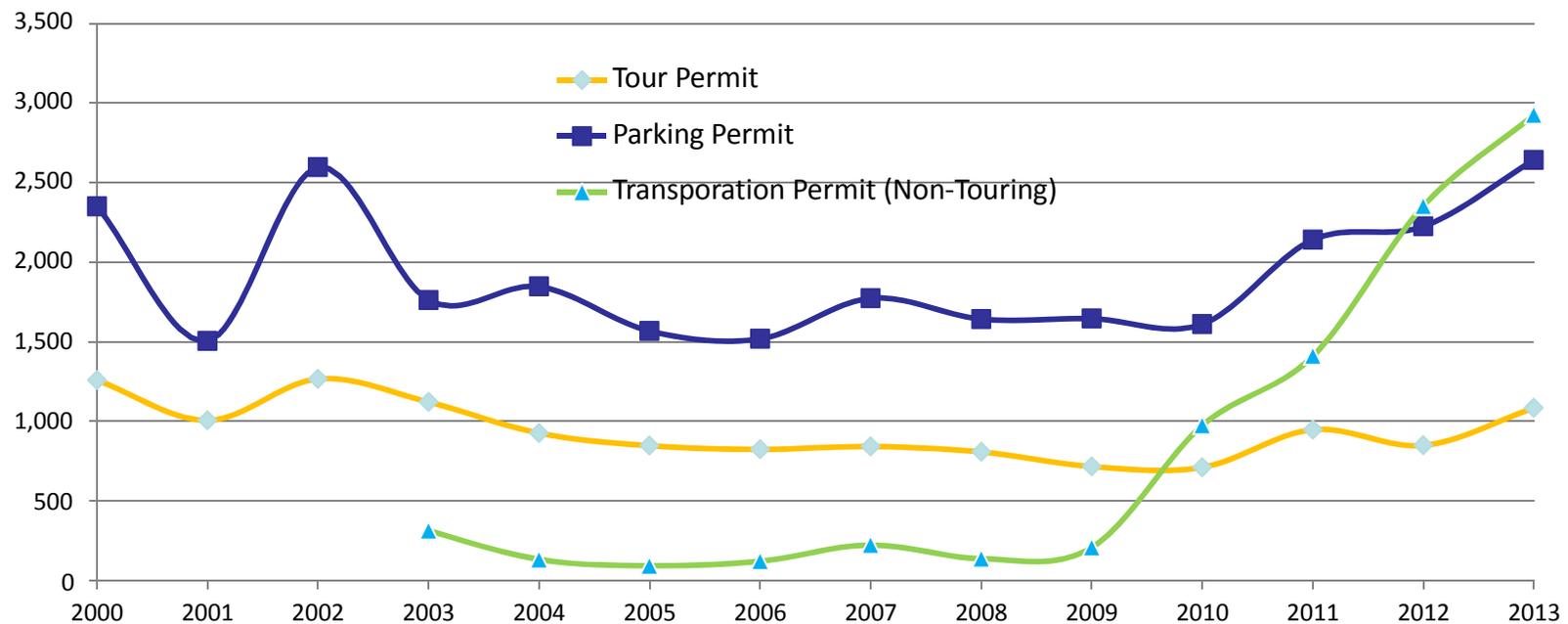
Number of Carriage Tours Annually



2000-2013: 15.8% increase

Data Source: Tourism Office, City of Charleston

Peninsula Bus Tour Permits



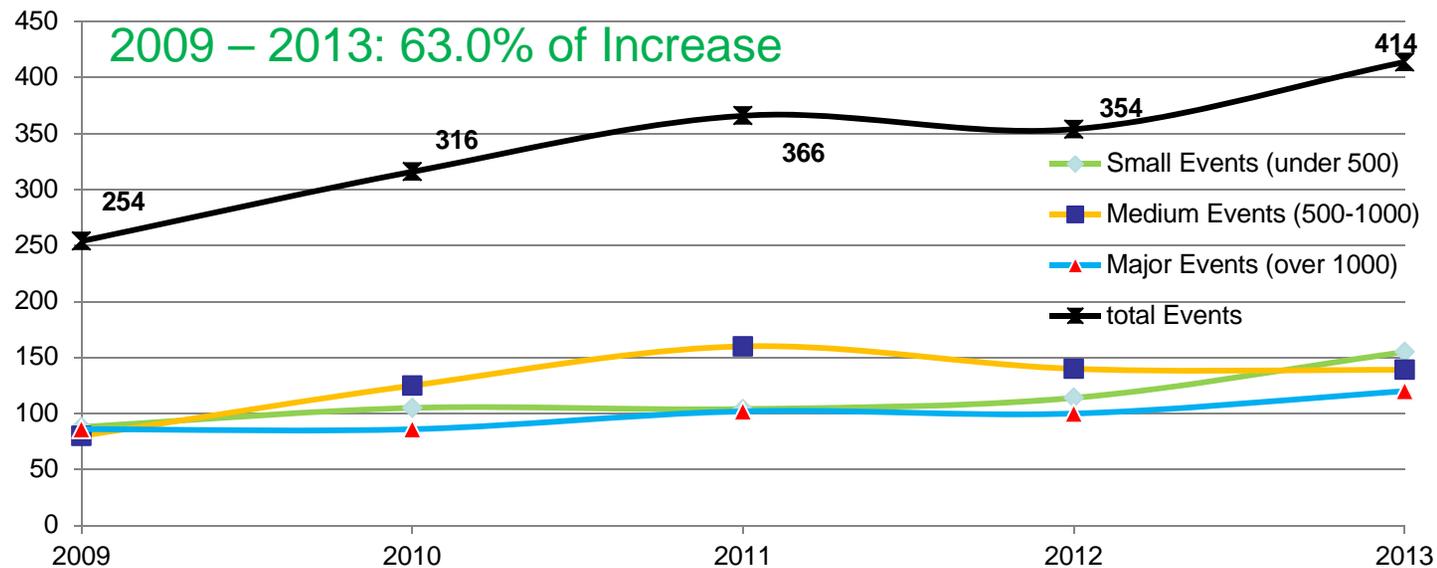
Data Source: Tourism Office, City of Charleston

Major Events and Impacts

Event	Year	Visitor Ratio	# of Attendees	Spending per adult per day	Impact	Jobs
SEWE	2012	59%	35,000	\$290	\$32.4 million	306
Wine & Food	2013	64%	23,000	\$267	\$10.7 million	101
Festival of Houses and Gardens	2012	90%	11,000	\$200	\$5.4 million	65

Data Source: Office of Tourism Analysis, College of Charleston

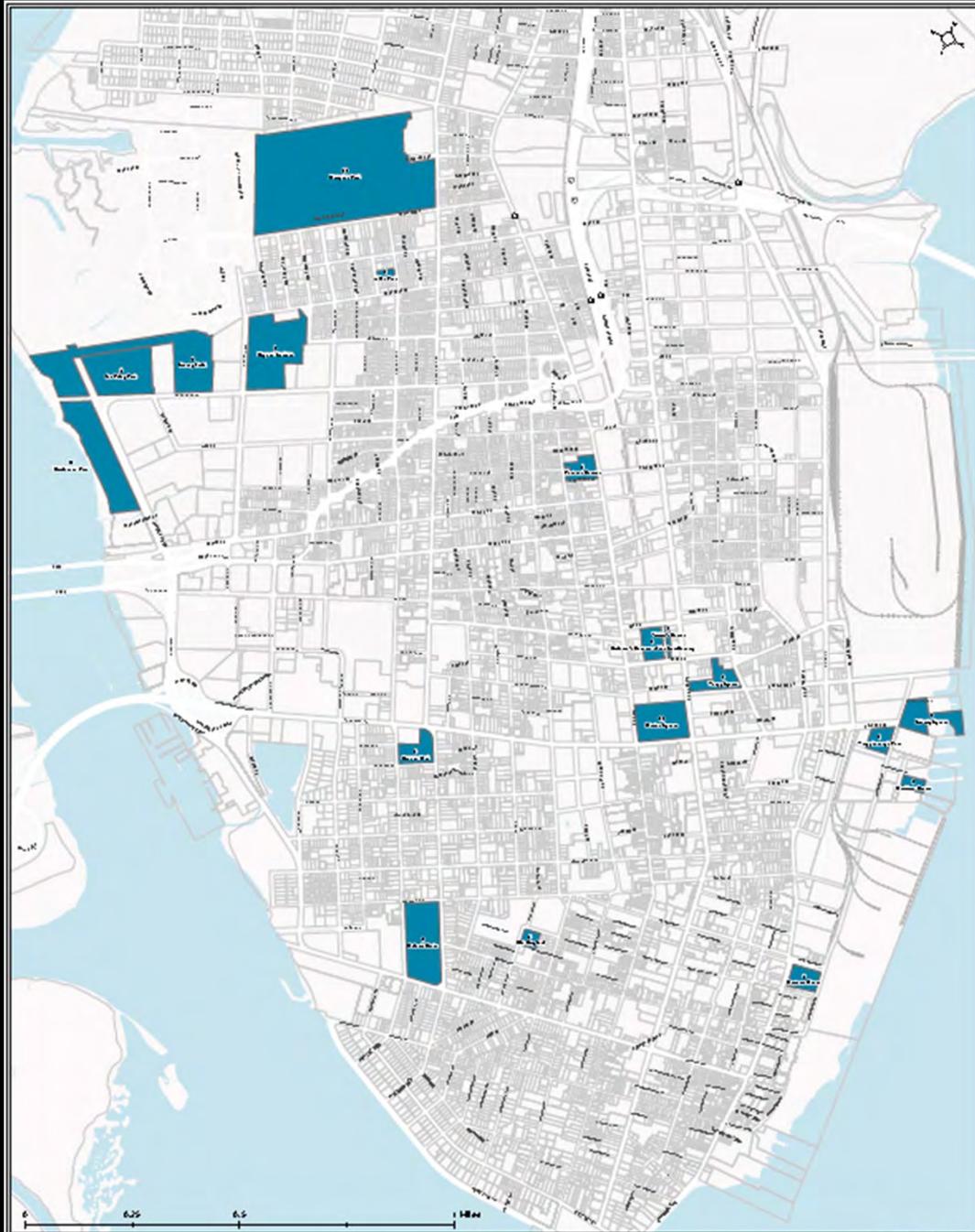
Number of Events in the City



Number of even-days booked:

2011	2012	2013
600	799	549

Data Source: Special Event Committee, City of Charleston



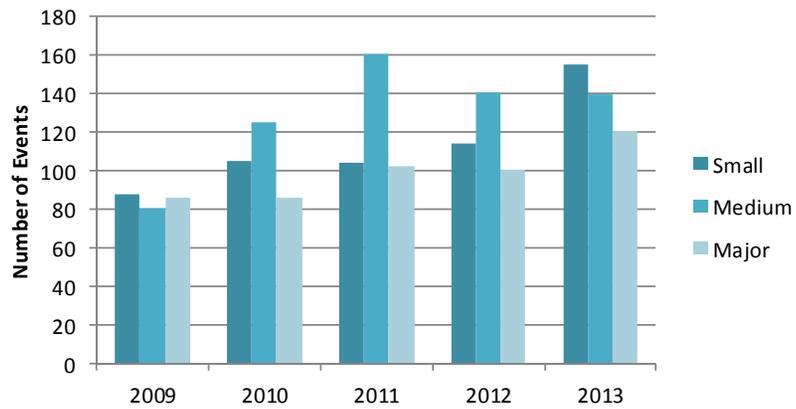
Legend
 Special Event Locations
 Page 4 of 12

Special Event Locations

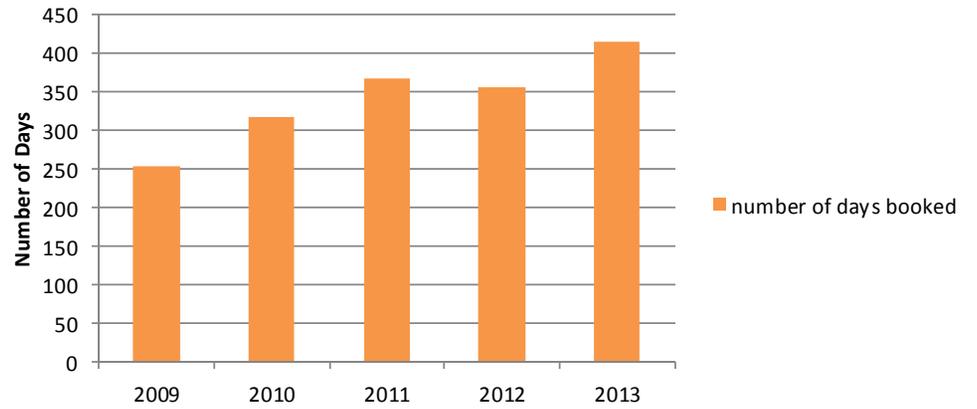
Map Date: 11/11/2014
 Map Title: Special Event Locations
 Map Scale: 1" = 1.0 Mile
 Map Author: [illegible]
 Map Reviewer: [illegible]
 Map Status: [illegible]

	2009	2010	2011	2012	2013				2009	2010	2011	2012	2013
Small	88	105	104	114	155								
Medium	80	125	160	140	139		number of days booked		254	316	366	354	414
Major	86	86	102	100	120								

Special Events by Event Size

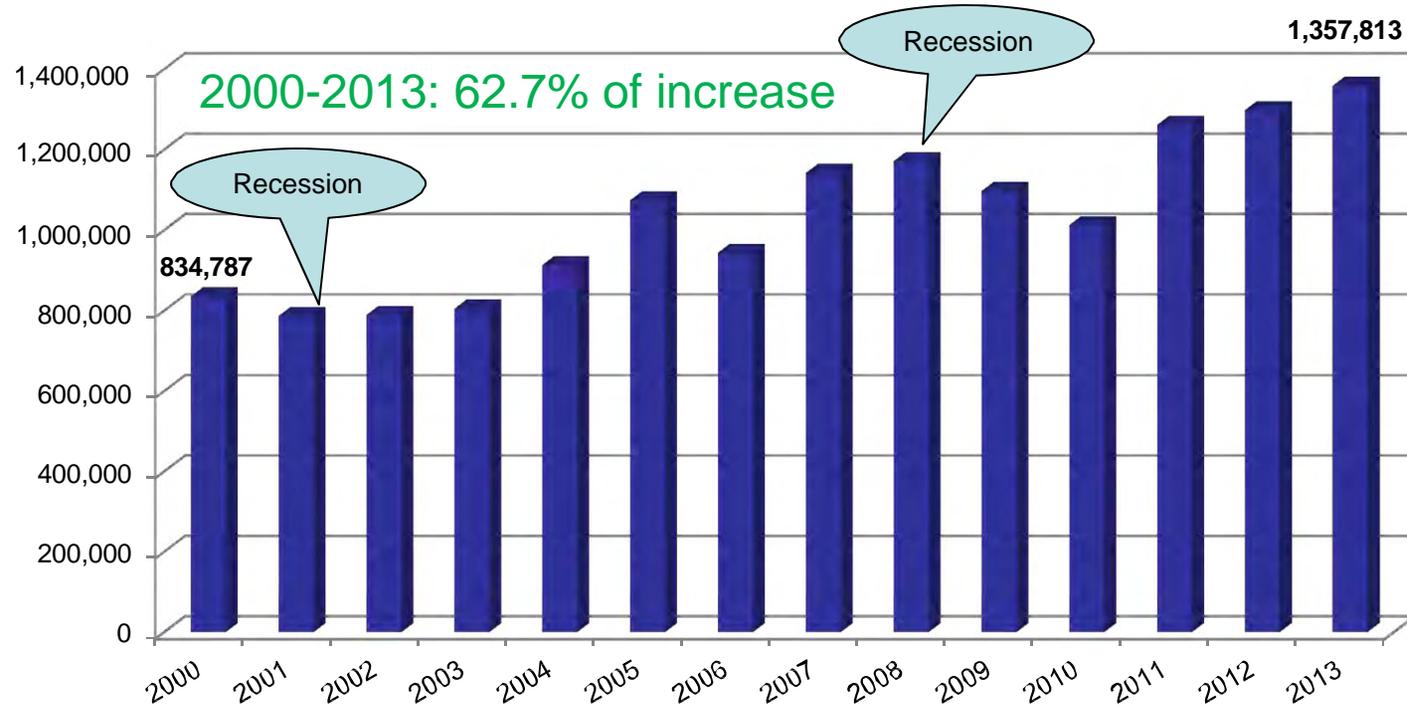


Number of Days Booked by Year



Airport Traffic

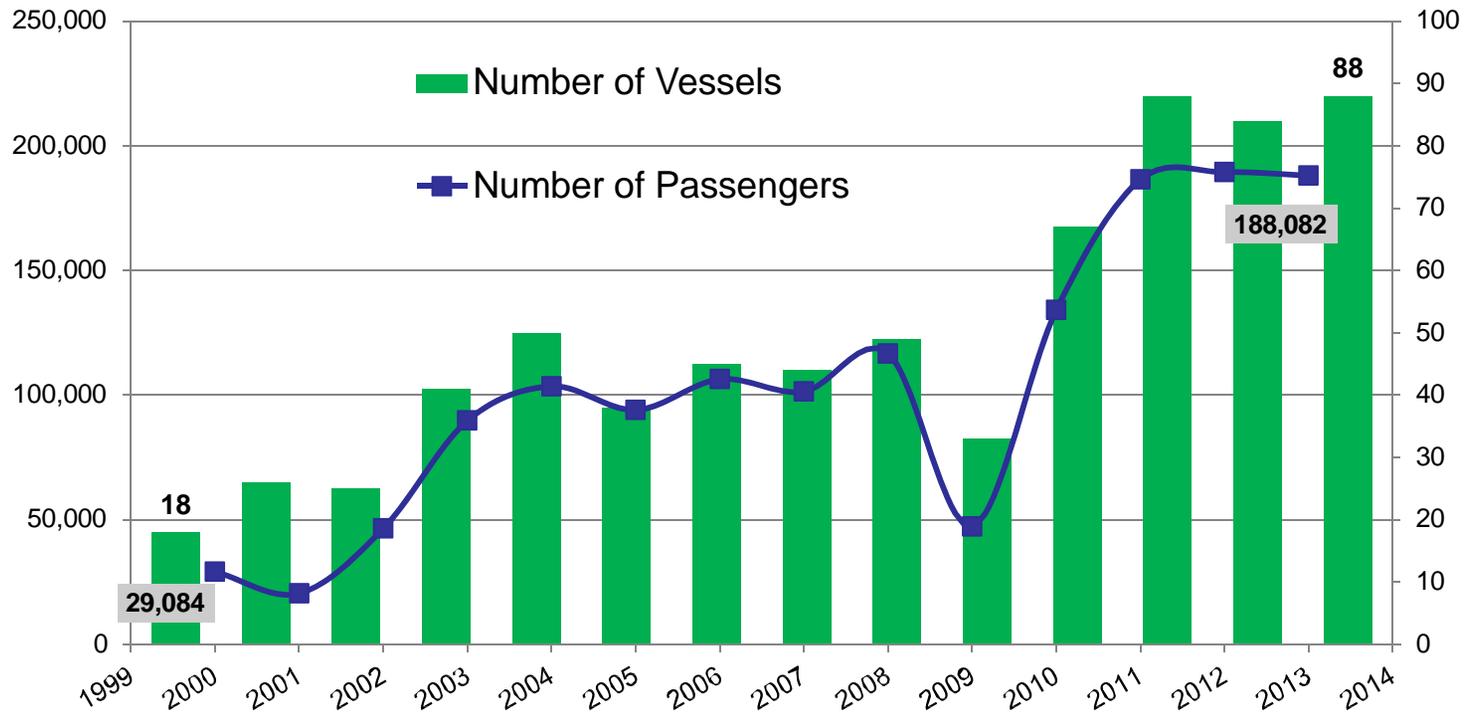
Charleston International Airport Enplanement



40.8% visitors, 59.2% residents
-- 2007 Office of Tourism Analysis Survey

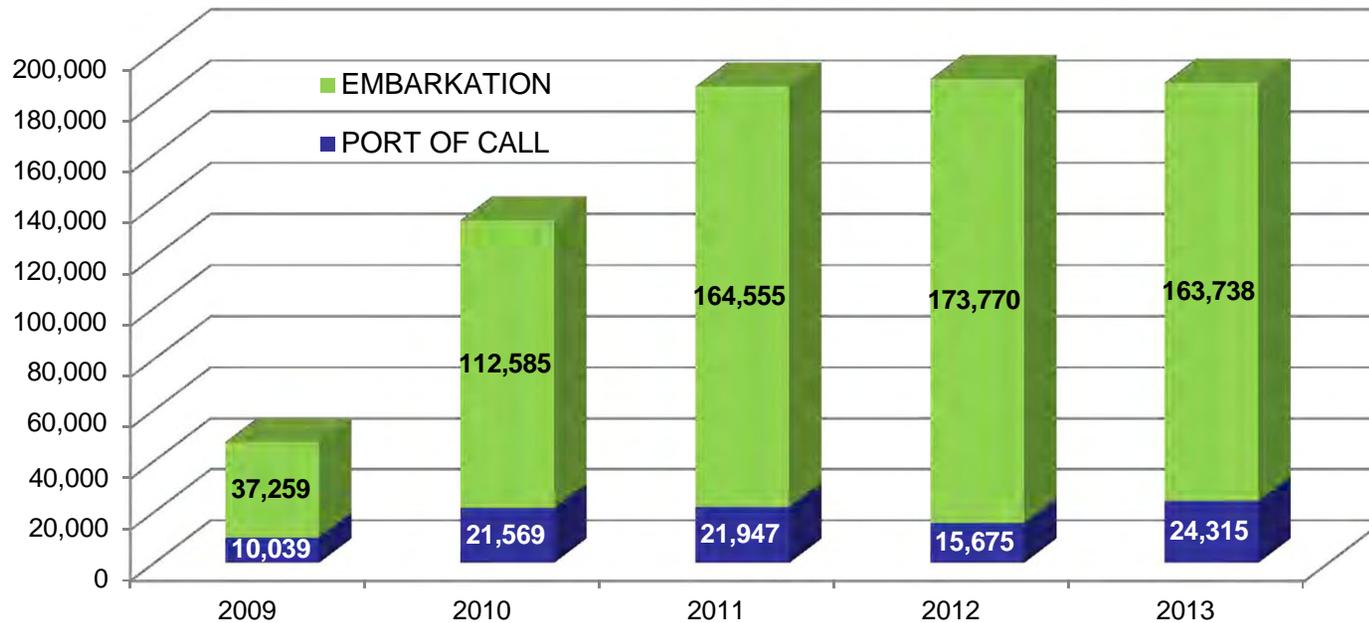
Data Source: FAA and Charleston International Airport

Cruise Ship Traffic Trends



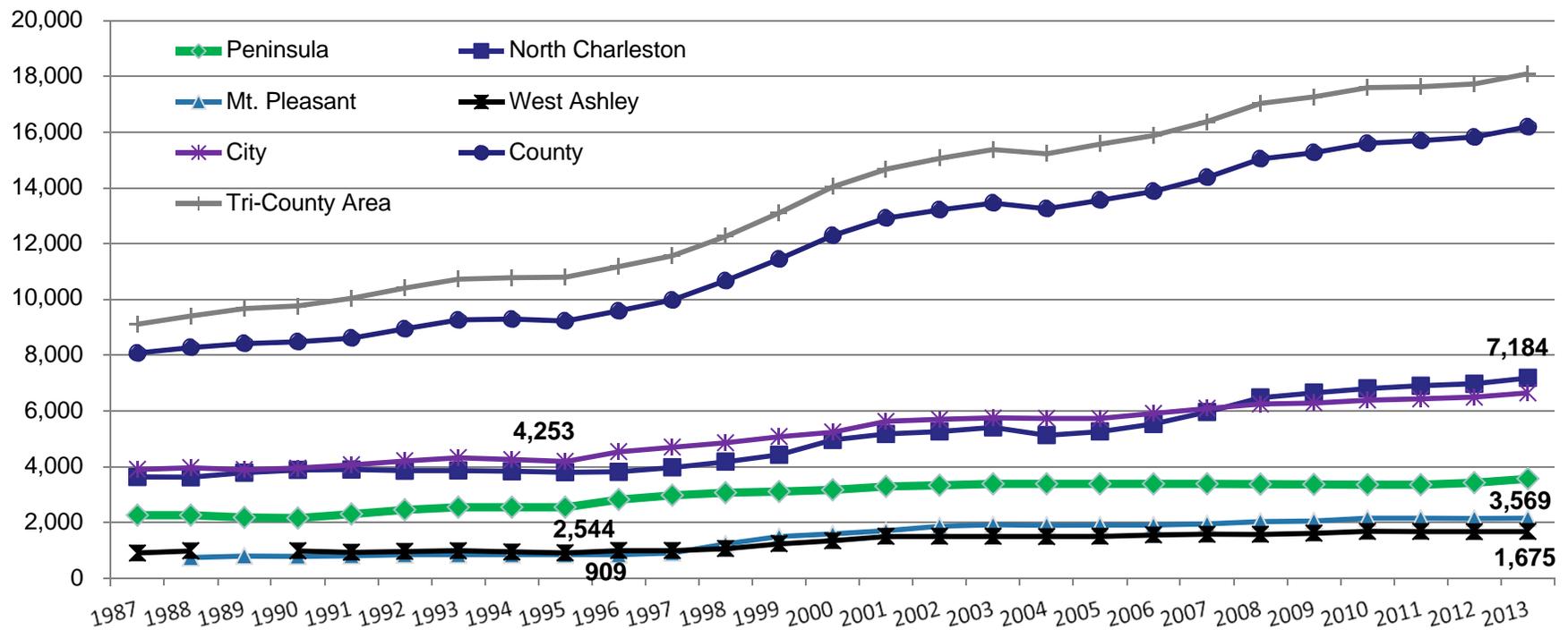
Data Source: South Carolina Port Authority

Cruise Ship Passenger Number by Type



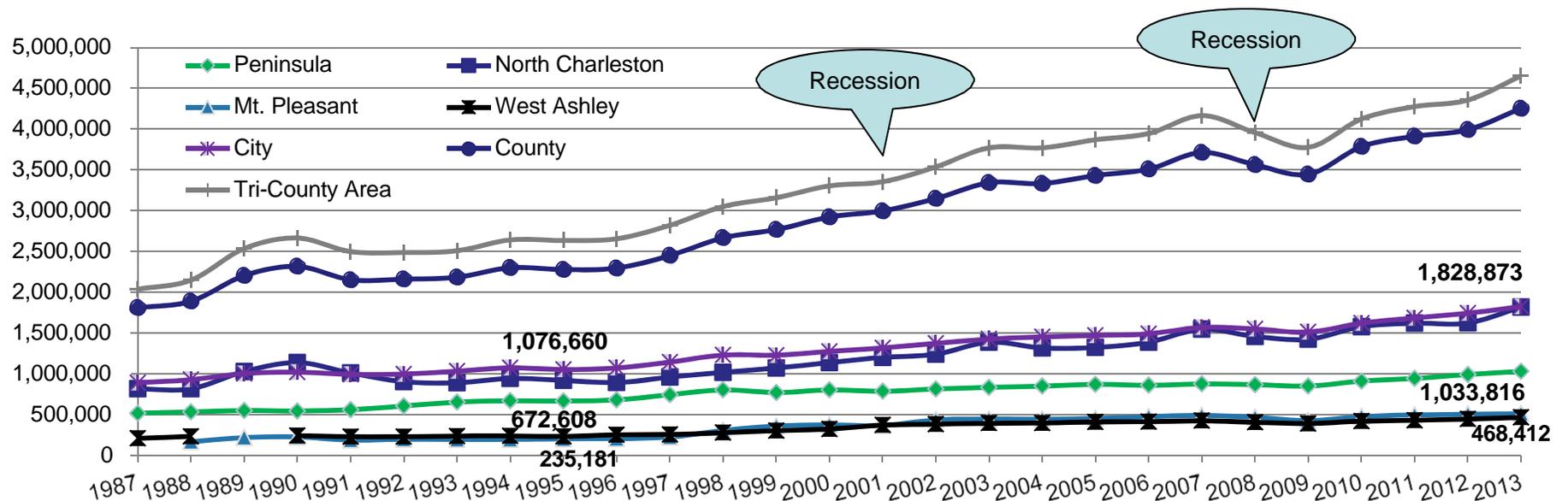
Data Source: South Carolina Port Authority

Hotel Room Supply Trends



Data Source: Smith Travel Research

Hotel Room Demand Trends (Roomnights Sold)



Data Source: Smith Travel Research

Hotel Room Supply & Demand Trends

		Peninsula	North Charleston	Mt. Pleasant	West Ashley	City	County	Tri-County Area	Tri-County Non-Peninsula	National
Supply	1988 - 2013	58.7%	98.9%	191.1%	71.9%	68.1%	96.2%	92.9%	103.2%	75.5%
	1994 - 2013	40.3%	87.4%	155.1%	78.2%	56.3%	74.3%	67.9%	76.4%	44.1%
Demand	1988 - 2013	93.3%	122.5%	201.8%	98.3%	96.8%	125.4%	116.9%	102.6%	74.8%
	1994 - 2013	53.7%	92.3%	157.3%	92.8%	69.9%	84.8%	76.0%	76.4%	38.7%

Data Source: Smith Travel Research



City of Charleston
Accommodations Overlay Zone

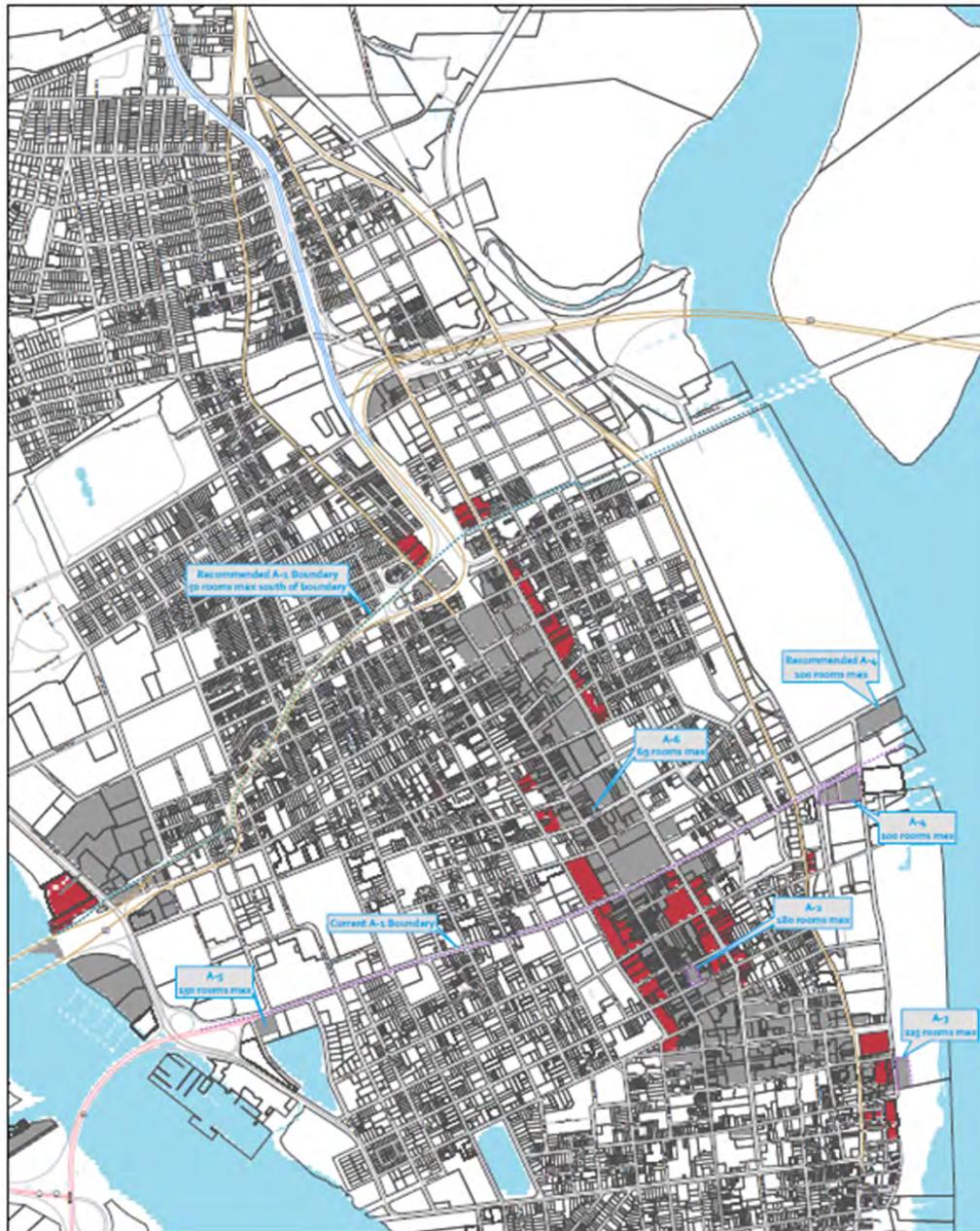
REVISED: 05.04.2023

Accommodations Overlay As Boundary

Property lines

Current Accommodations Overlay

Recommended Removal



Tourism impact in 2012

- Per visitor per day spending: \$205 in 2012
- The estimate of 4.8 million visitor count to **the tri-county area** is based on survey results and roomnights sold
- Total lodging sales in the tri-county area: \$614 million
- Tourism contributed to 16% of City's economy

Concluding Remarks

- The City of Charleston's visitor volume has higher growth than the national average: roughly 70% increase in visitor volume in the last 20 years; 2.7% annually on average
- The visitor volume in the tri-county area grew more: 76% in the last 20 years, and 2.9% annual growth
- Charleston had a farther reach in recent years
- Peninsula had a more controlled growth than the City and the tri-county area
- Greater growth in events than attractions

TOURISM MANAGEMENT IN CHARLESTON

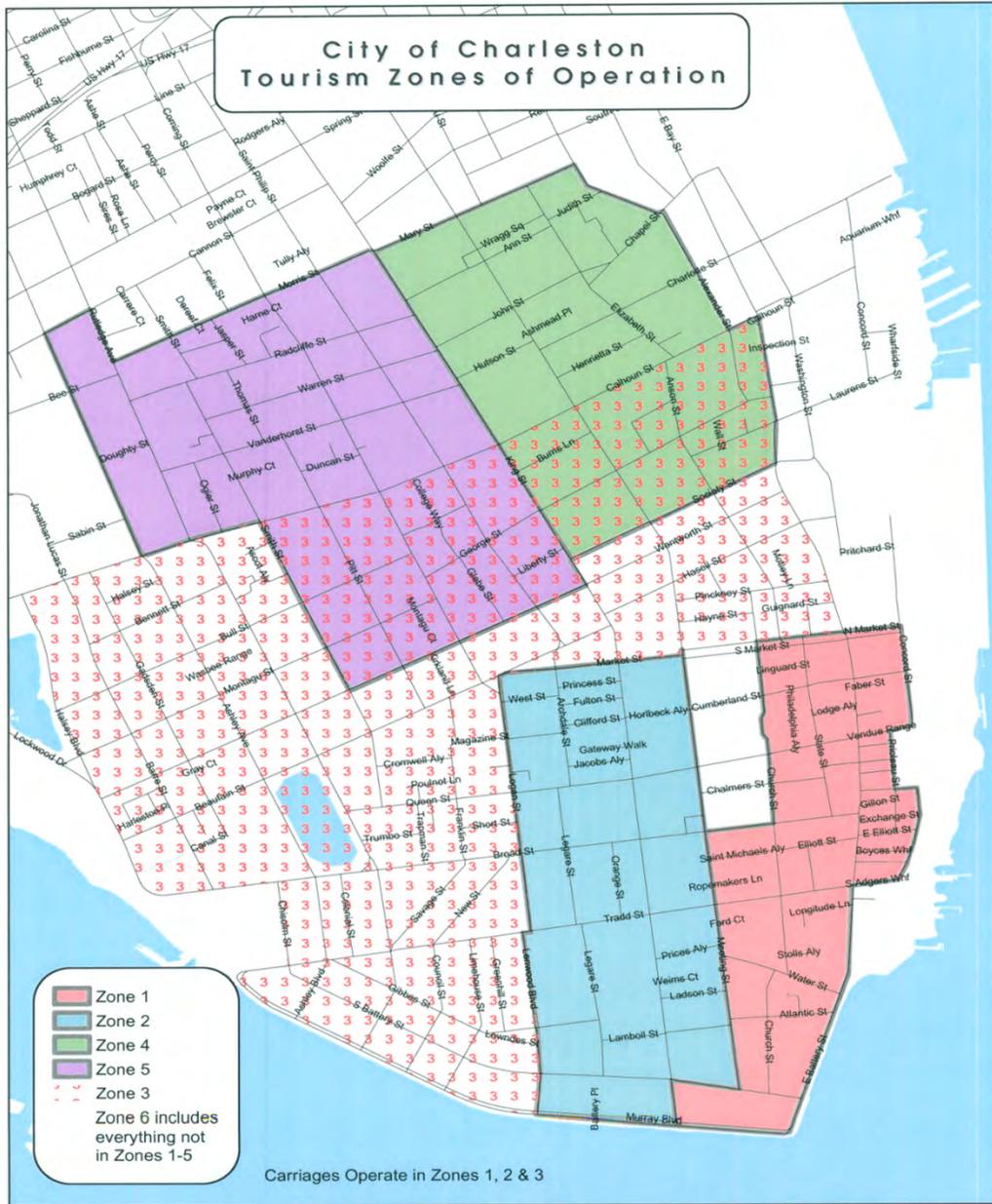








City of Charleston Tourism Zones of Operation





Permit
No 007735

20



TRANSPORTATION PERMIT

DATE: _____ TIME: _____
 NAME OF TOUR: _____
 ADDRESS: _____
 VEHICLE OWNER: _____
 ORIGIN: _____ DESTINATION: _____
 ROUTE: _____

PERMIT MUST BE DISPLAYED IN WINDSHIELD WHILE TRANSPORTING.

Code 29 - 146

Initials _____

Permit
No 009392

20



PARKING PERMIT

DATE: _____ TIME: _____
 NAME OF TOUR: _____
 ADDRESS: _____
 VEHICLE OWNER: _____
 ORIGIN: _____ DESTINATION: _____
 ROUTE: _____

PERMIT MUST BE DISPLAYED IN WINDSHIELD.

Code 29 - 113
Code 29 - 149

Initials _____

Permit
No 004069

20



PERIMETER ROUTE PERMIT

DATE: _____ TIME: _____
 NAME OF TOUR: _____
 ADDRESS: _____
 LOCAL GUIDE SERVICE: _____
 VEHICLE OWNER: _____

It is the responsibility of the private guide to ensure that the tour bus follows the perimeter route as outlined by the City's Tourism Ordinance. As the guide disembarks to provide a walking tour, it is then the responsibility of the bus driver to follow the perimeter route as outlined by the guide. Any deviation from the perimeter route must be reported to the Tourism Director immediately.

Please surrender this permit to the private guide at the end of the tour. Thank you for your cooperation.

PERMIT MUST BE DISPLAYED IN WINDSHIELD WHILE ON TOUR.

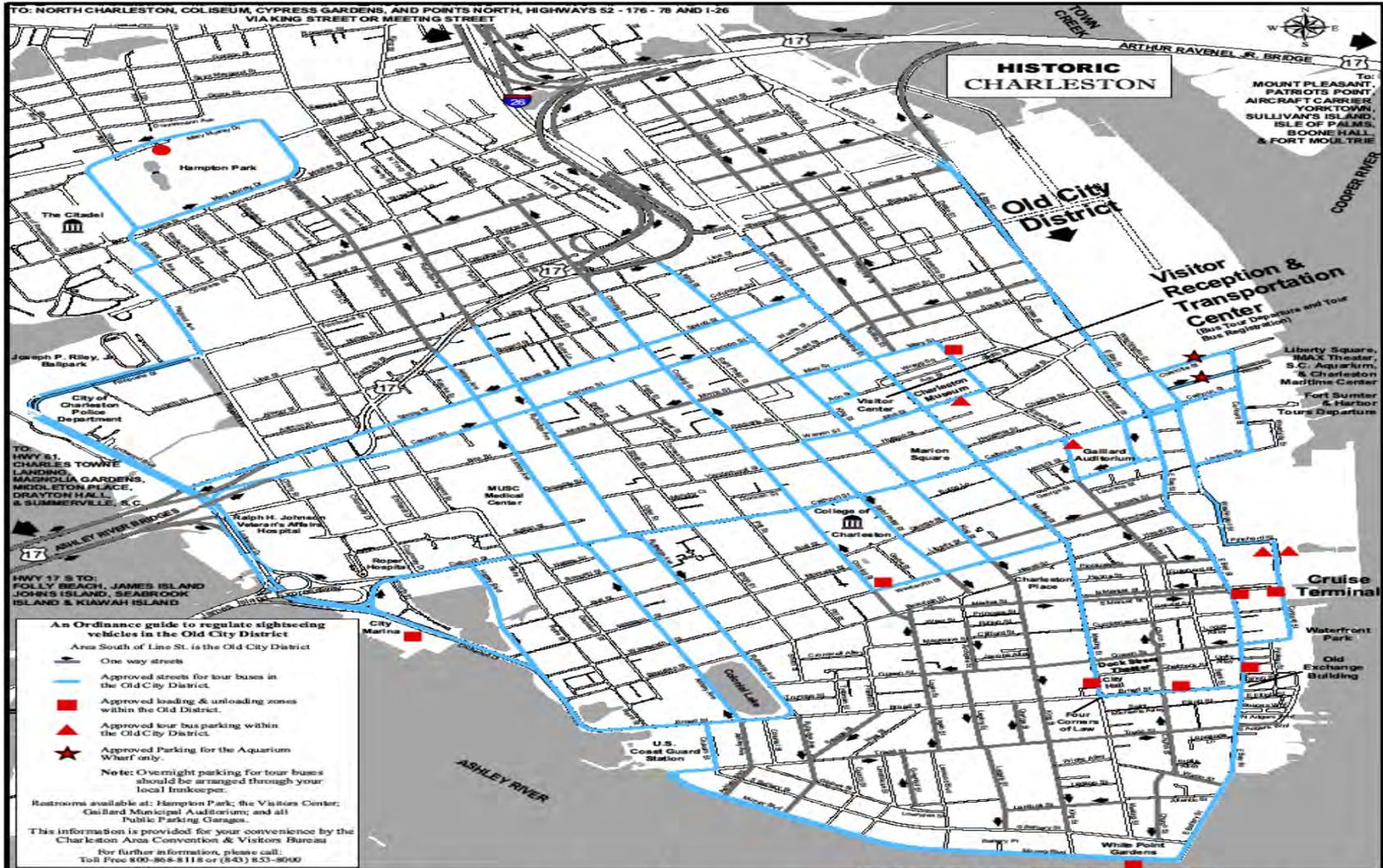
Code 29 - 113

The Quik Press, Inc. (843) 795-0914





Approved Streets for Tour Vehicles



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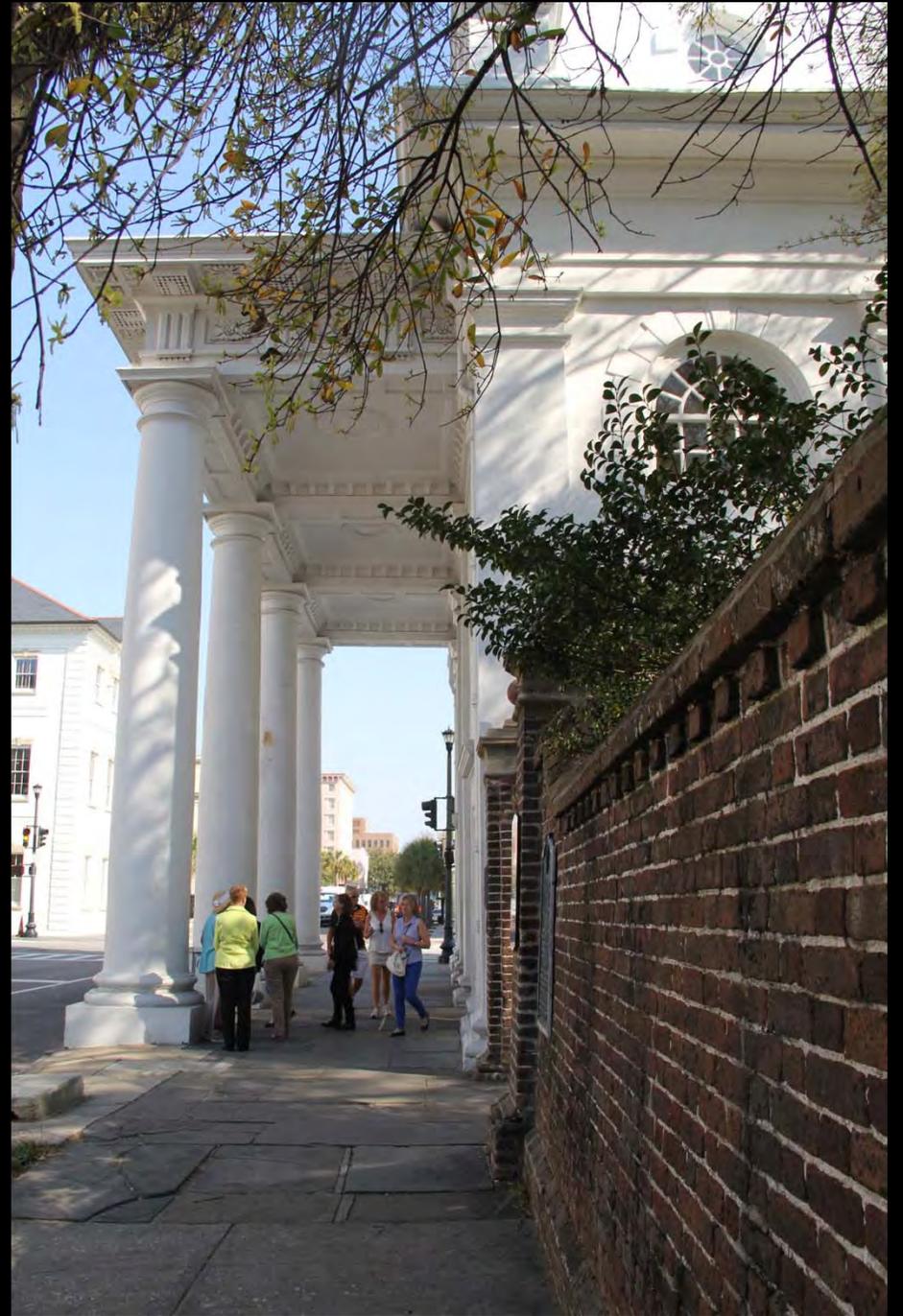
VISITORS RECEPTION & TRANSPORTATION CENTER
 375 Meeting Street, across from the Charleston Museum

Our trained staff is on duty to answer questions and assist visitors seven days a week. Information and brochures are available on tours, attractions, accommodations, dining, and shopping. Forever Charleston, an audio/visual orientation film, is shown daily. Tours, attractions, and event tickets can be purchased on site at the Planning Counter. The All-Day Pass is now available onboard both CARTA Trolleys and Metro Buses. All other CARTA Transit Passes are available inside the Visitor Reception and Transportation Center and many are also available at Piggy Wiggly grocery stores. For more information please call (843) 724-7420 or (843) 747-0922.



Questions

Breakout Session Key Issues



VISITOR ORIENTATION

Issues

Solutions



Board located at the front of the room.

Board located at the back of the room.



SPECIAL EVENTS

Issues

Solutions

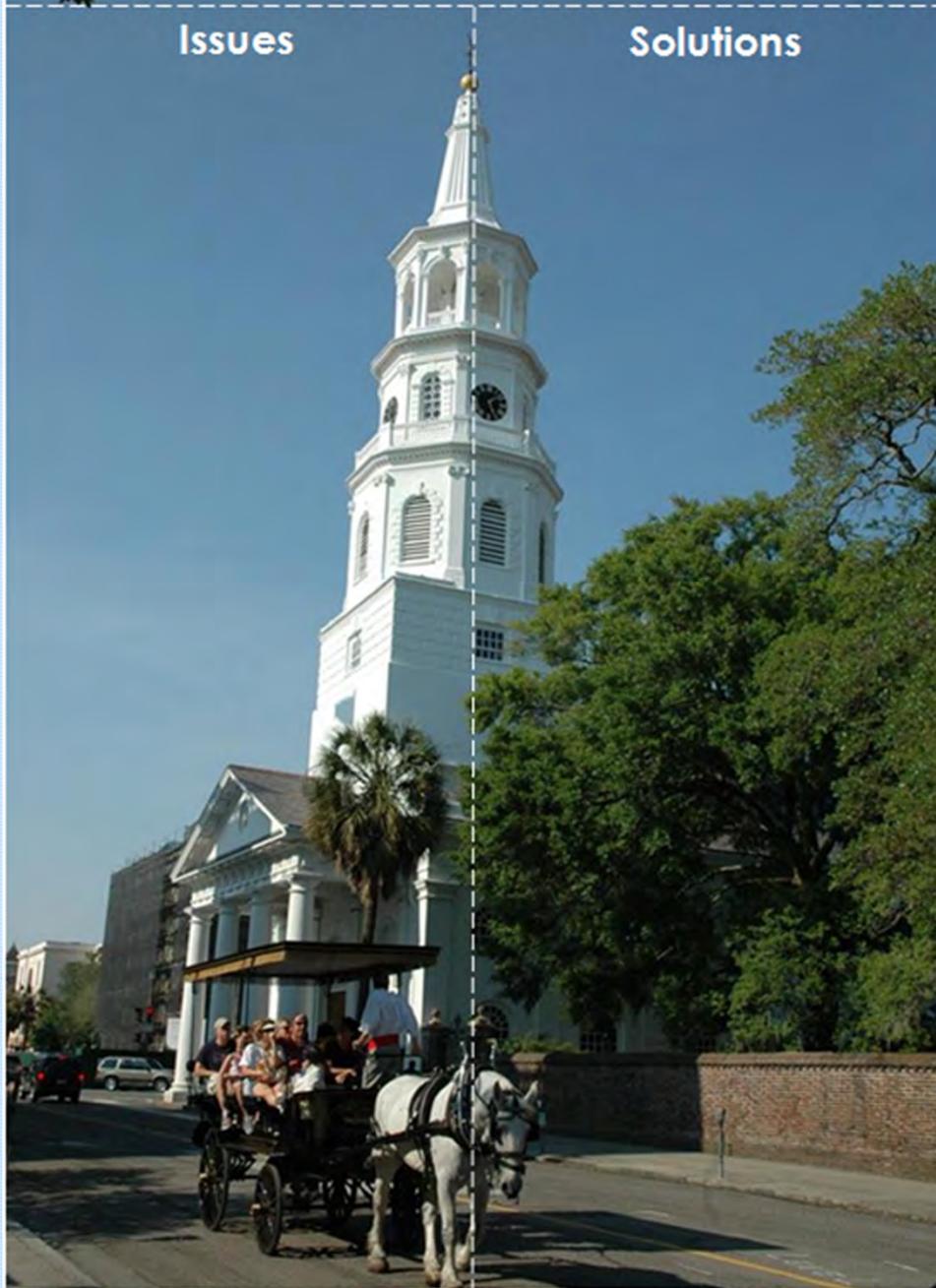


Board located at
the back of the
room.

CITY IMAGE/ AUTHENTICITY

Issues

Solutions



Board located in
the hallway.

Please participate
in the video
answer as well.

Board located in
the hallway.



Question for video

What makes Charleston
unique or authentic?



Next Steps