Office of Tourism Analysis
ANNUAL REPORT
Mission:

The Office of Tourism Analysis is one of the Centers of Excellence in the School of Business at the College of Charleston. The Office is counseled and advised by industry and community leaders charged with proposing the Office's research priorities. The Office collaborates mainly with the Charleston Area Convention and Visitors Bureau to implement a series of competitiveness research and monitoring programs and disseminates such information to decision-makers and stakeholders in the Lowcountry's hospitality and tourism industry.

Grants Totaling Over $115,000:
1. Charleston Hospitality Performance Tracking Project
2. Wedding Week/Fashion Week Survey Project
3. Wild Dunes Economic Impact Research
Staff

Wayne Smith, Ph.D.
Interim Director, Department Chair, & Associate Professor

Melinda Patience
Research Coordinator & Analyst

Affiliated Faculty Members

John Crotts, Ph.D.
Professor
Dr. Crotts has worked with the OTA on surveying Charleston residents’ attitude toward tourism development.

Robert Frash, Ph.D.
Associate Professor
Dr. Frash works with the OTA on his research of the impact of the Taste of Charleston and the Lowcountry Oyster Festival events.

Frank Hefner, Ph.D.
Professor
Dr. Hefner works with the OTA on forecasting hospitality performance and various other economic impact studies.

Steve Litvin, Ph.D.
Professor
Dr. Litvin works with the OTA on allocating Charleston accommodation taxes for the Charleston County Council.

Brumby McLeod, Ph.D.
Associate Professor
Dr. McLeod works with the OTA on benchmarking vacation rental market performance and the impact of 2nd home and AirBnB.
Student Researchers

Hunter Gaffney

Hannah Wagner

Stephanie Baril

Kathleen Vanderlip


Ashley Leggett
Public Talks

SEEING THE BIG PICTURE: EXAMINING TOURISM & TRANSPORTATION TRENDS

CACVB Travel Council
March 14, 2017

Academic Exchanges

Melinda Patience
Attended the Qualtrics Insight Summit and Certification Training in Salt Lake City, UT, February 28 - March 3, 2017

Attended "Introduction to IMPLAN" workshop in Huntersville, NC, January 17–19, 2017
International Exchanges

Hanyu Zhang, Ph.D., Visiting Scholar, Jinan University Shenzhen Tourism College, China, September 2015 to August 2016

Zhenting Li, Ph.D., Visiting Scholar, Tourism and Environment College, Shaanxi Normal University, March 2016 to February 2017

Bing Wu, Ph.D., Visiting Scholar, Tourism and Environment College, Shaanxi Normal University, September 2016 to September 2017

New Director for 2017–2018 Academic Year

The 2016–2017 academic year included an extensive search for a new Office of Tourism Analysis Director. We are happy to announce that Dr. Daniel Guttentag, Ph.D., will be joining us in August. Daniel holds a Ph.D. in Recreation and Leisure Studies and Master’s degree in Tourism Policy and Planning, both from the University of Waterloo in Ontario, Canada. He has previously worked for several years as a Tourism Business Analyst for the Toronto Convention and Visitors Bureau. Daniel is especially interested in tourism innovations, particularly peer-to-peer short-term rental services like AirBnB. He is additionally interested in topics including virtual reality, market segmentation, volunteer tourism, and casino gambling behavior. Daniel is excited to join the OTA and the HTMT Department and to have the opportunity to work with our great students and industry partners. He will be joined in Charleston by his wife, Joslyne, and their two children.
2016–2017 Project List & Descriptions

- **Tracking of Hotel Room Inventory in the Charleston Area:** We continually keep track of hotel room inventory in the Charleston area.
- **Vacation Rental Market Performance Tracking System:** We continually track the performance of the beach vacation rental market in the Charleston area.
- **Quarterly Barometer Report of Charleston Area’s Hospitality Performance:** We produced quarterly reports of Charleston’s hospitality performance compared to that of the nation and competing cities.
- **Complete Charleston Area Visitor Intercept Survey Report:** We completed the 2016 Charleston Area Visitor Intercept Survey Report in April 2017.
- **Annual Hospitality Forecasting 2016–2017:** We completed our annual hospitality performance forecasting report in August 2016.
- **Charleston County Accommodation Tax Distribution, FY2017:** Working with the CACVB and Dr. Stephen Litvin, we completed Charleston County accommodation tax distribution evaluation in July 2016.
- **Charleston Area Visitor Inquiry Study:** We completed the 2016 Charleston Area Visitor Inquiry Study in April 2017.
- **Charleston Tourism Impact Study of 2016:** We completed Charleston tourism impact study of 2016 in March 2017.
- **Weekly and Monthly Hospitality Performance Reports, 2016–2017:** We regularly report weekly and monthly hospitality performance reports.
- **Peninsula Hospitality Workforce Parking Study:** We performed an online survey of hospitality workers on the Peninsula to gather feedback about their parking and transportation needs for the City of Charleston in March 2017.
- **Mt. Pleasant Hospitality Workforce Transportation Study:** We performed an online survey of hospitality workers in Mt. Pleasant to gather feedback about their parking and transportation needs for the Town of Mt. Pleasant in May 2017.
- **Historic Weekly and Monthly Hotel Performance Benchmarking:** We created a calendar comparing hotel performance in the Charleston area with events in Charleston.
- **Economic Impact of the 2017 Charleston Wine+Food Festival:** We performed an online survey of attendees of the 2017 Charleston Wine+Food Festival and calculated the economic impact of the event.
- **Wedding Week Attendee Experience Survey:** We performed an online survey of attendees of Wedding Week 2017.
- **Fashion Week Attendee Experience and Economic Impact:** We performed an online survey of attendees of Fashion Week 2017 and calculated the economic impact of the event.
- **Charleston Area Visitor Center Experience Survey:** Visitor Center guests were asked to fill out a six-question survey about their use of the Center.
- **Taste of Charleston Attendee Experience Survey:** We used a team of students to survey attendees of the 2016 Taste of Charleston in September 2016.
- **Lowcountry Oyster Festival Attendee Experience Survey:** We used a team of students to survey attendees of the 2017 Lowcountry Oyster Festival in January 2017.
- **Wild Dunes Economic Impact Study:** We conducted an economic impact study of the Wild Dunes Resort in August 2017.
- **Examining Cruise Ship Visitor Flows:** We conducted a survey of cruise ship passenger to find out what parts of Charleston they are visiting.
- **Municipal Tourism Dollars Study:** We compiled data on local and state accommodation tax and hospitality fees collected by municipalities within Charleston County.
- **West Ashley Aquatic Center Feasibility Study:** We conducted focus groups, phone interviews, and data gathering about the potential costs and benefits of building an aquatic center in West Ashley.
Project Abstracts

2016 Charleston Area Visitor Intercept Survey Report

A survey of visitors to the Charleston tri-county area revealed important demographic and behavioral patterns. More than 300 survey responses revealed that the visitors are mainly 50 years or older with the “Baby Boomer” age group dominating. There is also a peak in the early 40+ group, indicating business travelers. The respondents are most likely to be college educated, married or living with a partner, and have upper-middle income; they are mainly from adjacent states. Ethnically, Caucasians dominate the visitor population with very few other ethnicities. More than half of Charleston visitors are repeat guests. They spent an average of $799 per adult per trip, with $227 per adult per day locally. Most of them are extremely satisfied with their visits. They enjoyed the history of Charleston and food, and disliked humidity and parking. Most likely they will visit the Charleston City Market, historic houses, waterfront parks, beaches, and historic plantations. Most importantly, we also learned that most Charleston visitors also visited Mt. Pleasant, West of the Ashley, North Charleston, Isle of Palms, Kiawah Island, and Folly Beach. The average number of cities/areas visited is about 3. The average traveling party sizes of 2–3 adults without kids remained consistent year-over-year. The adoption of mobile technology and social media was increasing significantly among Charleston visitors. These results show that Charleston continues to attract an affluent visitor group. The CACVB continues to play a significant role in attracting visitors and helping them plan their trip.

Charleston Area Beach Communities Vacation Rental Reporting

In 2016, the Charleston Area Beach Communities Vacation Rental Reporting project continued to document the changes and growth in the vacation rental market. The annual average total occupancy for 2016 was 57.0% (a decrease of 2.6% over 2015) and the average sold occupancy was 42.8% (up 6.7% over 2015). In terms of rates and revenue, the average daily rate was $330.05 (up 1.0% over 2015) which brought in $141.17 in revenue per available unit.

Charleston County Accommodation Tax Distribution, Fiscal Year 2016–2017

Thirty-five applications for accommodation tax grants were submitted to Charleston County for fiscal year 2015–2016. These applications were evaluated based on economic impact (50%), community impact (10%), media impact (20%), and an overall panel judgment (20%). The scores from each of these categories were combined for an overall score. These scores were then used to determine our recommendation to Charleston County as to what percentage of the available $300,000 in accommodation tax grant money the applicant would receive.

Estimation of Tourism Economic Impacts in the Charleston Area, 2016

In 2016, the Charleston area welcomed an estimated 5.44 million visitors. These visitors attributed to an estimated $1.8 billion in labor earnings. Visitors spent an average of $227 per visitor per day and generated $8.7 million in lodging sales. Just under 10% of Tri-County sales can be attributed to tourism. Overall, Charleston area visitors generated a total economic impact of over $4.2 billion.
Media Coverage

The Charleston Wine + Food Festival is missing men
*Post and Courier* 5/12/17
This is the second year in a row that women apparently accounted for more than 70 percent of festival attendees; a gender breakdown wasn't published in 2015. But Melinda Patience, research coordinator at the College of Charleston’s Office of Tourism Analysis, warns the results could reflect the fact that women tend to complete electronic surveys.

Local Experts Weigh in on Offshore Drilling
*FoxCharleston.com* 5/8/17
Wayne Smith from College of Charleston’s Department of Hospitality and Tourism Management and Eddy Moore, Energy and Climate Program Director at the Coastal Conservation League joined us to talk about both the environmental and economic impact offshore drilling could have on the Palmetto State.

Coastal mayors take a stand against Trump plan to open Atlantic to offshore drilling
*Charleston City Paper* 4/28/17
The problem for many coastal leaders is that the risk of a potential spill poses a major threat to the area’s tourism industry — which in Charleston’s case brought in $3.7 billion in 2015, according to the College of Charleston’s Office of Tourism Analysis’ most recent study. Immediately following the signing of Trump’s executive order, Congressman Mark Sanford filed a bill that would suspend offshore drilling and all related activities in the waters off the East Coast for the next 10 years.

Charleston's History in Jeopardy?
*AMHQ Weekend* 2/4/17
Tourism is big business in cities such as Savannah, GA and Charleston, SC. But rising seas levels may bury parts of the cities under water. Nick Walker and Kelly Cass talked with Prof. Wayne Smith from CofC Department of Hospitality and Tourism Management about what can be done to keep the cities from disappearing.

Weddings a big part of Charleston's tourism economy
*Post and Courier* 1/23/17
The Charleston Area Convention and Visitors Bureau, the Charleston Metro Chamber of Commerce and the College of Charleston’s Office of Tourism Analysis keep track of the economic impact of tourism, but none of them had any figures on the impact of weddings when contacted last week. To put 5,000 weddings in context, though, tourism officials estimated 5.1 million visitors to Charleston in 2015, for an economic impact of $3.7 billion and 41,000 jobs.

Charleston County hotel numbers post strong finish for 2016
*Post and Courier* 1/13/17
Despite the hotel building boom in the Charleston area, occupancy was higher in 2016 than the year before, according to the latest report from the College of Charleston's Office of Tourism Analysis. Hotel occupancy in Charleston County averaged 75.7 percent in 2016, a 2.7 percent increase over the previous year. Occupancy increased despite adding 417 rooms to the inventory. The year ended with 16,038 rooms available, up 417 from the end of 2015. The number of room nights sold was up 5.2 percent from the previous year.
Media Coverage

Holy City still top choice for travelers
Post and Courier 10/17/16
Partly as a result of the publicity, the number of visitors to Charleston swelled from 4.22 million in 2010 to 5.15 million in 2015, a 22 percent jump, according to the College of Charleston Office of Tourism Analysis.

A more inviting Gibbes lures twice the visitors
Post and Courier 9/27/16
Travel + Leisure recently named Charleston the No. 1 city in the world. At least partly as a result, the number of visitors swelled from 4.22 million in 2010 to 5.15 million last year, a 22 percent jump, according to the College of Charleston’s Office of Tourism Analysis.

Report: Hotel occupancy strong amid rapid growth
Post and Courier 9/24/16
Despite the local surge in hotel construction, occupancy continues to remain above this time last year, according to the most recent report from the College of Charleston Office of Tourism Analysis.

Charleston reveals irresistible charm as world’s friendliest city
Post and Courier 8/14/16
At least partly as a result of the publicity, the number of visitors to Charleston swelled from 4.22 million in 2010 to 5.15 million last year, a 22 percent jump, according to the College of Charleston Office of Tourism Analysis. Charleston has also gained a reputation as an international food destination.

Inn traffic Suburban hotel boom fuels traffic concerns in Lowcountry
Post and Courier 8/12/16
Partly as a result of the publicity, the number of visitors swelled from 4.22 million in 2010 to 5.15 million in 2015, a 22 percent jump, according to the College of Charleston Office of Tourism Analysis. The room supply rose just 7 percent in those five years — to 15,970 from 14,912.

Charleston County hotel occupancy strong
Post and Courier 8/6/16
Of the nearly 16,000 hotel rooms in Charleston County, almost 85 percent of them were full in June, according to the College of Charleston’s Office of Tourism Analysis.

Charleston really is greatest city on Earth
Post and Courier 7/6/16
Since 2012, the first year the city picked up the No. 1 city in the U.S. and Canada from the magazine’s readers, Charleston’s tourism economy grew 14 percent to $3.68 billion last year, according to the Office of Tourism Analysis at the College of Charleston.

Charleston named best city in 2016 Travel + Leisure World’s Best Awards
Counton2.com 7/6/16
Since 2012, the first year Charleston was awarded the No. 1 City in the U.S. and Canada ranking in the Travel + Leisure World’s Best Awards, the total economic impact of tourism has increased 14% to $3.68 billion in 2015 according the Office of Tourism Analysis at the College of Charleston.
Questions or Comments?

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