

SOUTH CAROLINA TOURISM ACTION PLAN

OCTOBER

06

Volume I



NEW CAROLINA™
SOUTH CAROLINA'S COUNCIL ON COMPETITIVENESS

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NEW CAROLINA TOURISM ACTION PLAN

VOLUME I: THE ACTION PLAN

1. EXECUTIVE SUMMARY

Tourism, the largest industry in South Carolina, has long been a major driver of quality of life and opportunity but its positive impact could be increased significantly.

A combination of State Tourism Administration re-organization, private tourism industry unification on policy direction, increased marketing, aggressive tourism product development, improved travel access, and development that sustains the natural, cultural and recreational assets that make the state an attractive destination would substantially increase the benefits of the tourism industry to South Carolina.

A detailed list of such recommendations is the centerpiece of the Tourism Action Plan (TAP) which is presented in three volumes by Tourism Development International (TDI). The action plan is the result of seven months of research by a team of international experts who conducted more than 400 interviews and traveled across the state to evaluate the state's overall approach to tourism development.

TDI, whose extensive client list includes the national tourism agencies of China, India, the UK, Ireland and the Netherlands as well as corporations such as Delta Air Lines and Holiday Inn, began its work in South Carolina in November of 2005. The initiative was funded by a partnership of public and private-sector entities, including many small businesses under the umbrella of the Travel and Tourism Cluster Activation Committee of South Carolina's Council on Competitiveness.

Tourism in South Carolina currently contributes \$10.9 billion a year to Gross State Product and employs approximately 216,000 people. Implementing the TAP recommendations would allow the state to realistically target doubling the growth rate of the industry within five years and deliver \$40 billion in annual Gross State Product by the year 2020, the plan concludes.

Primary recommendations of the Tourism Action Plan include:

- The current State Tourism Office should be re-organized into an entity in its own right which is one level removed from government – a State Tourism Organization or a Public / Private Partnership Body. Such action would facilitate the need to strengthen its leadership and technical support role for the industry, remove civil service encumbrances and obstacles to operate in a business environment, and facilitate the recruitment and remuneration of experienced personnel. Such re-organization would accord to best practice in tourism development.
- The private sector state leaders should form an umbrella organization for the purpose of unifying the diverse components of the state's tourism industry in order to advocate for issues of industry-wide concern and promote the exchange of information and ideas to advance the industry. Tourism is a large industry comprised of many small players. As demonstrated by the economic impact data, the industry is critically important to the state's economy. However, due to the divided nature of the industry and its current lack of industry-wide organization, the industry's influence among policymakers is not commensurate with its economic significance. The industry should form an umbrella tourism organization for the state following the models of such organizations as the Irish Tourism Industry Confederation and the Arizona Tourism Alliance.
- The state should sharply increase its tourism marketing budget. The Department of Parks, Recreation and Tourism's (SCPRT) marketing budget for FY 05/06 was \$14.6 million, of which \$10.1 million came from state appropriations. That means less than one-fifth of one percent of the \$9 billion in direct tourist spending during that same period was re-invested in marketing and advertising efforts to attract new visitors and encourage repeat visitation. TDI research shows that this is a low level of re-investment compared with other states and international destinations. The study found that South Carolina is not as widely recognized as a domestic or international tourism destination as it should be, given its products and geographic location. Fortunately, the study concluded that increased spending on marketing could push South Carolina to realize its latent potential.
- Tourism leaders at the regional and local level, including individual business owners and executives of local tourism authorities, should explore a model for cooperation and coordination on joint marketing with the state's tourism office (SCPRT) that emulates the successful programs of state tourism authorities such as Visit Florida and the Virginia Tourism Corporation. Similar programs in South Carolina would allow the state to more fully harness and leverage the strengths of private enterprise and local knowledge to create business-focused programs that are generally outside the scope of state government.

- A state product development plan should be developed and followed. South Carolina has a strong coastal tourism draw, but not enough inland products to create significantly increased tourism traffic in those areas. The product development plan should include incentives to private businesses to invest in the creation of new, expanded and upgraded accommodation and attractions across the state, so that all areas may benefit from the broad-based economic activity that the tourism industry generates. State assistance also should include research to identify potential new products and markets. SCPRT should add additional staff with specialized technical skills in product development and planning. Focused product development could create tourist-attracting clusters of activity near interstate highways and draw more visitors to areas such as the Greenville area, which has a strong industrial base but not the tourism traffic it has the potential to serve, given the natural and cultural attractions of the Upstate.
- Access by highway and air are limiting factors to tourism growth in varying degrees around the state. In particular, the lack of direct air access from centers within the U.S. and international markets is limiting potential visitor growth. Myrtle Beach in particular needs interstate highway access (the report notes that work has begun on interstate 73) and an improved airport to help accommodate more non-stop flights. The Grand Strand, the report adds, is in “an emergency situation” because of excess accommodation capacity, and improved access would fill rooms and utilize the area’s numerous attractions and recreational facilities and maximize Myrtle Beach’s potential as a national convention center.
- Charleston is considered to offer an immediate potential direct entry point for increased services. The report recommends a concerted joint effort be undertaken to promote South Carolina as a destination to stage more flights and new routes.
- From the mountains to the sea, South Carolina has abundant natural and cultural resources to attract new groups of tourists whose numbers are trending upward – including those interested in culture and history, outdoor adventure and eco-tourism. The study advises that protection of those resources is needed as development occurs to preserve those resources that are attracting new and repeat visitors in potentially fast-growing numbers.
- Service-industry jobs such as those in tourism are relatively inexpensive to create but attrition is a problem, both on the job and in schools that are training workers for the hospitality industry. The study includes detailed recommendations on improving courses of study and improving retention through high school, technical college and university-level programs as well as in the workplace. It also recommends training be provided by specialists from such organizations as the Hospitality Association of South Carolina.

- The tourism industry needs to design and launch a public awareness campaign aimed at raising tourism's profile, especially in rural and inland areas. The campaign should include the use of external measures such as advertising effectiveness and internal measures such as induced economic impact when issuing reports. This effort would have a cumulative effect if sustained. The public would gain a greater appreciation for the industry, encouraging consumption and participation, and policymakers would also have a greater understanding that would result in improved support for the industry.

Tourism and Travel is now one of the world's largest industries and the world's largest service industry, growing at an average annual rate of 4.5% worldwide.

South Carolina has the people, the product, and the potential for so much more. The world just keeps getting flatter, and given the competition from other states and other countries, now is the time to move toward making South Carolina a truly competitive player in that most sustainable of economic arenas – tourism and hospitality.

-- Michael Mac Nulty
Executive Chairman
Tourism Development International

(Excerpt from the South Carolina
Tourism Action Plan)

2. INTRODUCTION

BLOSSOMING OF A NEW ERA FOR TOURISM

South Carolina can become one of the USA's leading tourism states in less than two decades.

Already a leading economic sector in the state – and growing faster than any other – tourism is also low cost in terms of job creation.

Why then do we need to change the way tourism is dealt with?

The answer is twofold.

First, the surface has barely been scratched. The state has a vast array of natural and cultural resources that offer opportunities for development – as yet unrealized. The coast is the state's present magnet but the interior has numerous opportunities for tourism development. The challenge - to create the conditions to convert this potential to reality with the attendant benefits both to the state's population and business community.

Second, tourism is a business activity but a highly fragmented one, for which government management and support is vital in order for it to achieve its full potential. Without state policy and planning, unchecked tourism development can be environmentally damaging; while destination marketing support is needed to establish the reputation of the state, thereby facilitating the private sector's individual marketing and promotional efforts.

Tourism cannot succeed without public/private sector collaboration and coordination. This means an organization with a degree of independence from government. It involves both parties on an equal footing. This is how it is done in Florida.

Successful tourism spreads its benefits. To enable this to happen in South Carolina, product planning guidance and support from the state is needed. At the same time, destination success depends on image and reputation among prospective tourists. The state is not widely recognized as a tourism destination. It suffers by comparison with its neighbors. For the tourism developments in the inland areas of South Carolina to succeed, the state needs to create a perception of itself as a premier tourist destination. In an age of intense destination competition, this means much higher marketing budgetary support from the state and its private sector partners.

Less than one-fifth of one percent of the State's earnings from tourism is presently reinvested in destination marketing. If budgets are doubled, growth rates can be doubled within the next five years. . . and doubled again by 2020! Tourism, which currently contributes \$10.9 billion a year to gross state product and employs 216,000 people, can grow to contribute more than a \$40 billion a year to gross state product with commensurate growth in jobs. Given this

potential, the state should explore ways to provide the tourism industry with a dedicated, recurring source of revenue for supporting tourism. This revenue source should grow in conjunction with the growth of the industry to ensure that South Carolina remains competitive. Many taxes are currently collected by the state from the tourism industry; however, only a small portion of one of these taxes (accommodations tax) is reinvested in the industry. South Carolina's tourism industry is truly a flower waiting to blossom. If it is properly nurtured, the state can be a global leader in tourism.

INTRODUCTION

The South Carolina Tourism Action Plan (SCTAP) consultancy assignment was contracted to Tourism Development International (TDI) by the South Carolina Tourism Cluster Committee (SCTCC) as part of the New Carolina Council on Competitiveness. It was designed to achieve the goal identified by Professor M. Porter and the Monitor Company Group in its 2004 study of the Hospitality and Tourism Cluster under the SCCI of:

increasing gross tourism product per visitor

and, in so doing, to respond to the challenges laid down by Porter et al; namely:

- to improve collaboration amongst industry & officials;
- to identify high spending potential tourist segments;
- to develop & package its tourism assets to attract the markets identified, and
- to execute an appropriate marketing strategy.

The report is presented in three volumes:

This Volume I contains The Action Plan, comprising the principal findings and conclusions and recommendations, along with a schedule of specific actions that are prioritized with lead responsibilities indicated.

Volume II contains the detailed reports prepared in respect to Economic Impact & Analysis (Chapter 1), Tourism Industry Organization & Cooperation (Chapter 2), Air & Surface Access (Chapter 3), Tourism Planning & Product Development (Chapter 4), Market Evaluation & Prioritization (Chapter 5), Marketing Strategy (Chapter 6), and the Development of Human Resources (Chapter 7). Each of the Chapters is preceded by an Executive Summary that constitutes the “bridge” to this Volume I.

The technical reports were compiled by a team of experts who conducted over 400 meetings and site visits with industry officials and state government officials covering all 11 tourism regions in South Carolina, during the period November 2005 to May 2006. In-state mileage traveled by experts is estimated to have been over 5,000.

Technical study visits to Ireland and Florida for benchmarking purposes, were also organized during this time frame comprising members of the South Carolina Tourism Cluster Committee (SCTCC) and the expert team. (details in volume III)

Volume III comprises technical and administrative annexes.

These reports address the objective and challenges identified by Porter et al; and determine the direction, methodology and actions necessary to be taken by the state and the private sector if tourism is to realize its full potential across the entire state of South Carolina.

ACKNOWLEDGEMENTS

The Tourism Development International team of experts wish to sincerely thank the members of the Tourism Cluster Committee, and the Directors of the Regional Tourism Organizations and Convention and Visitor Bureaus, throughout South Carolina, for the assistance, advice and courtesy extended to the team during the course of their work. There were also many individuals involved in tourism in South Carolina who provided advice and information during the study period for which the team is most grateful (see Volume III for meeting contacts).

Finally, without the organizational support, assistance and guidance provided by the tourism staff of the South Carolina Department of Parks, Recreation and Tourism, the expert team would not have been able to complete this project. In particular we would like to mention

Chad Prosser – Director of the South Carolina Department of Parks, Recreation and Tourism

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Julie Flowers – State Tourism Economist SCPRT

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We owe our gratitude to all concerned.

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3. KEY FINDINGS

The consultancy team's overall assessment is that South Carolina is underperforming its potential – it is doing well but could do much, much better!

The tourism sector is a primary driver of South Carolina's economy. The growth in tourism's contribution contrasts with stagnation or decline in agriculture and manufacturing; and is achieved at relatively low economic cost to the state since tourism investment is predominantly made by the private-sector.

In spite of the present good performance of the sector and its strong future prospects, tourism's future expansion is hampered by a series of obstacles:

- State government recognition of the extent of the sector's role in, and contribution to, the state economy is low. This appears to be a main reason why the legislature does not provide the state tourism organization with the resources required to lead and facilitate the expansion of the sector;
- The sector is lacking in respect of its institutions: the public sector organization is an inappropriate one; while private sector representation is weak and ineffective. In consequence, there is insufficient cooperation and coordination between the public and private sectors;
- Visitor access to the state acts as a deterrent to many prospective travelers: there are too few direct air services into the state from main and secondary U.S. cities and Canada, while there are none from European markets; while the incomplete interstate highway network restricts visitation to coastal areas;
- South Carolina has a strong coastal tourism product but very little of major significance to draw tourists to upstate areas;
- Its marketing and promotional effort suffers from being under-resourced and spread too thinly to be effective; and there is an urgent need to reappraise the utilization of tourism tax dollars. South Carolina collects around \$150 million in Hotel and/or Restaurant taxes - \$100 million from hotel guests alone. Of the accommodations tax of \$40 million less than 30% is spent on marketing, which is totally inadequate
- Its training programs tend towards being too wide and generalized, while employers appear not to have strategies to reduce the level of staff attrition.

Put simply, the current organization of tourism, the lack of planning and asset preservation, and inadequate investment – in particular in marketing - pose the most significant threats to the future of tourism to and within the state.

The principal findings that underpin our conclusions and assertions are as follows:

Economic Impacts

Tourism contributed \$10.9 billion towards Gross State Product and generated 216,000 jobs (direct, indirect & induced impacts considered) in 2003. These levels represented 9% of total Gross State Product of \$123.4 billion, and 12% of total state employment. Government taxes from tourism amounted to \$1.2 billion in 2003, constituting 15% of the state total. Tourism's contribution in South Carolina runs at around one-fifth the level achieved in Florida. These figures are higher than previous estimates which did not take account of induced impacts.

Industry Organization – State and Private Sector

There are 12 private sector organizations/groups, most being primarily concerned with looking after their own interests with little coordination or co-operation. The private sector is not speaking with a "Single Voice" on behalf of the largest industry in South Carolina. As a result, there is a low awareness amongst legislators of the importance of tourism as an economic generator, and a major source of employment.

The 11 geographically-based tourism regions' RTOs promote their tourism products and activities that are within their local boundaries. The many CVBs across the state follow similar practice. This has reinforced the fragmentation of the state's tourism product presentation and been a major contributory factor to the absence of sufficient critical mass of tourism products to attract visitors.

The present role of the regions in promotion and visitor information, without a product development support input, undermines an integrated enterprise policy. In addition the absence of a State Product Development Plan has resulted in the vacuum being filled by non-tourism market-related developments.

The state's tourism administration is a minor part of the SCPRT Department of the South Carolina state government. The SCPRT Department's culture is service-orientated (i.e. Parks and Recreations) while tourism is a business. Recent cutbacks in staffing have also diminished the skills base of the Tourism Office.

There is little formal liaison or reporting relationship between the tourism regions /CVBs and the state tourism organization.

Access

The state's six commercial service airports have historically attempted to gain new or additional service through individual efforts. Today, the state of air service can be summarized as follows:

- ❖ Primarily regional jet service by affiliates of major carriers to hubs and major markets.
- ❖ Low cost carrier service on a limited basis at Myrtle Beach only.
- ❖ Large aircraft comprise only 13% of total airport departures.
- ❖ Passenger traffic at inland state airports (Columbia, Greenville/Spartanburg) is subject to drive diversion due to proximity to the Charlotte hub.
- ❖ Service to Charlotte (US Air) and Atlanta (Delta) dominates the market.

When compared to each airport's peer group, the current service levels are consistent from both a destination and capacity standpoint.

The existing airport serving Myrtle Beach is limited in its capacity and services; while road access to the coastal resort areas is under strain and causing frustration for arriving visitors. These are impediments to growth.

Product

A wide range of accommodation types are available throughout the state though the amount of upscale accommodation is limited and some of the hotel accommodation is outdated. To develop nature, activity and heritage tourism, additional accommodation will be required outside the coastal areas. The average spend per visitor is influenced downwards by the dominance of self-catering accommodation.

The main development strengths include golf, beaches, nature, heritage, rural areas and country towns. Nature, heritage and activity products are identified in market research as in growing demand by today's tourists. These strengths are counterbalanced by a weakness in presentation and packaging, a lack of flagship or icon products and the mixed image of Myrtle Beach.

There is no overall guidance for tourism product planning, nor any system of assistance provided through the SCPRT which does not operate a Tourism Product Development Section to match its Marketing and Sales Section.

Standard planning controls are not applied throughout the state. This is leading to an erosion of some of South Carolina's natural assets. There is a need for co-ordination with other state agencies and local government.

Marketing

South Carolina is very well positioned to capitalize on its close proximity to the main tourism generating markets in the United States. International tourism has been growing at a significantly faster rate than domestic U.S. tourism over the past two decades. In respect to both the domestic and international markets, demand for culture and heritage tourism, and outdoor activity and soft adventure-based vacations is growing as tourists increasingly demand direct access to the nature and culture of the destinations they choose to visit. Across the globe, vacationers display an increased awareness of the environment.

South Carolina's tourism is founded on the leisure market, primarily drawn from in-state and neighboring states traveling by automobile in family units, couples or on motor coach tours. Tourists are drawn to South Carolina by its coastal attractions and facilities, each area along the coast catering for a different market segment, ranging from the Myrtle Beach beach area and recreational facilities catering to the middle and lower income family and golfing markets to Charleston attracting the older tourist interested in history and culture, and Hilton Head drawing the upscale segments attracted by the area's quality facilities and ambience. The nature of the state's coastal tourism is changing, however, with new developments attracting higher spending tourist market segments.

SCPRT's marketing budget for the year was \$14.6 million, with \$10.1 million contributed through state appropriation. The focus of marketing activities is on the domestic (including Canadian) market to which over 62% of the budget is dedicated; international markets account for 10% of marketing spending; over 22% goes on building relationships under the "leadership" goal, of which \$3 million (or over 20%) is distributed as grants through the Tourism Marketing Partnership Program (TMPP); and the remaining 6% is spread across State Parks, the Heritage Corridor and niche market segments.

The state's contribution to the marketing budget represents barely 0.1% of tourism's economic value to South Carolina (i.e. \$10.1 million as against \$9 billion direct tourist spending). This represents a low level of re-investment in such a major industry when compared against other domestic and international destinations (see Appendix 2).

A set of destinations were studied to examine the investment: returns ratio in respect of tourism marketing expenditure. The destinations exemplified include both U.S. and foreign destinations at varying stages of evolution in the tourist area life cycle. They are located in various parts of the world so, at varying distances from, and attracting different, source markets. Their marketing activity spend ranges from less than 0.1% of tourist revenues – the State of Virginia – to 1 to 1.5% – Scotland, Ireland and New Zealand. South Carolina's marketing activity expenditure of \$14.6 million amounts to 0.175% of the direct spending by tourists in the state (see Appendix 2).

SCPRT's marketing activities can be characterized as "marketing what sells" – an approach that in practice means "selling the coast". The state's present positioning focuses on its scenic beauty and hospitality i.e. *Smiling Faces. Beautiful Places*.

The TMPP encourages partnership – grants being given on a "matching" basis – and involves local entities to engage in tourism marketing in combination with the state in order "to manage a sustainable tourism industry throughout South Carolina". However, this approach has a number of flaws: it encourages individualism rather than coordination between local towns/cities; many of the activities supported are not related to tourism to any significant degree; the size of grant is too small to enable activities to be undertaken with significant "reach" into the marketplace; and there is little consistency between activities/events receiving grants with the state's tourism marketing and promotion thrusts.

The state has a myriad of natural and cultural resources with the potential to meet the needs and expectations of many tourist market sources and segments. Only in the coastal areas and centers like Greenville, however, have these resources been developed to attract and cater for various tourist markets on any significant scale.

The key factors underpinning the state's future marketing strategy are:

- ❖ present development is largely at coastal destinations but there is the opportunity to develop an extensive and varied tourism product over the next five years or so,
- ❖ there exists the short term opportunity to broaden the range of markets and segments attracted to the established destinations such as Charleston, through developments targeted at the upscale segments, a greater marketing focus on international markets and increased attention to extending visitors' length of stay through combining the different coastal destinations, and
- ❖ the present overcapacity in the Myrtle Beach area represents an emergency situation that needs to be addressed through a major increase in marketing and promotional support.

Human Resource Development

At state and county level much has been done to ensure that those seeking a career in the hospitality and tourism sector have access to pre-employment study programs; while at high school level the South Carolina Department of Education's "At Your Service" career guide and the Culinary Arts and Hospitality Operations electives promote and open up a pathway to, employment in the hospitality and tourism sectors. The technical institutes follow with well-structured associate degree, diploma and certificate programs, and the universities offer ample opportunity for the academically minded to progress to bachelor and masters degree level.

The private sector initiatives through the South Carolina Tourism & Hospitality Education Foundation have done much to link industry with the high school programs, and contributed greatly to the implementation of many post-employment training initiatives. Further involvement with local Chambers of Commerce has resulted in a number of pilot programs and training workshops for the industry's employees.

There are, however, a number of issues concerning hospitality and tourism education and training in the state, namely:

- ❖ the high rates of staff attrition in the tourism sector;
- ❖ a tendency for training programs to have wide content and weak balance – teaching a “little of everything and all of nothing”;
- ❖ the neglect of the accommodation operations area of study;
- ❖ insufficient employer attention to staff motivation and incentivization, and
- ❖ insufficient involvement with the rural communities in the sector.

4. STRATEGIC RECOMMENDATIONS

The guiding strategic recommendations made through this Tourism Action Plan are summarized as follows:

1. The state tourism office should be re-organized into an entity in its own right which is one level removed from government – A State Tourism Organization, or a Public/Private partnership.
2. A Product Development section should be established within the state tourism office to plan and work with local entities and private sector investors in creating a state-wide range of diversified tourism products – flagships, clusters, circuits – through a network of eight TDAs (Tourism Destinations Areas); (see Appendix 1).
3. A concerted, multi-stakeholder campaign, led by the state tourism office, should be mounted to attract new airlines providing direct service to Charleston, and to motivate existing carriers to increase their level of service; Myrtle Beach will have further potential also as a convention destination.
4. A two-phase marketing strategy should be adopted: in the short term focusing on the established – mainly coastal destinations – and in the mid-to-long term covering the full range of products developed across the state through the creation of many destinations within an overall “house of brands”, generating a perception of the state as a genuine vacation and convention destination on a par with any regional competitor.
5. A closer public/private working relationship should be sought through:
 - ❖ the establishment of a single trade body representing all sub-sectors of the industry and able to speak with a common, concerted and cohesive voice to government;
 - ❖ a greater role for the state tourism organization in market statistics and research into existing and new markets and segments, with the results disseminated through the private sector association to its members; and
 - ❖ the joint development and funding of marketing strategies and programs funded, along the lines of the Maison de la France model.
6. Education and training programs should be reviewed to more fully address the needs of the industry which itself should develop methods to motivate and incentivize staff. A tourism public awareness program is proposed to prepare South Carolinians for a much greater sector over coming years.

In detail, the recommendations made by report component are as follows:

Economics

1. In future economic calculations of the state's tourism sector contribution, full account should be taken of induced impacts. In this way the full effects of tourism on both GSP and jobs can be accurately assessed.

Organization and Co-operation

1. A "Single Voice" for the Tourism Industry should be formed through the establishment of a Tourism Industry Confederation, involving the major players in all sectors of the industry. The Confederation should be accorded representation on the board of the proposed State Tourism Organization in order to ensure effective implementation of public and private sector initiatives & activities – see next recommendation.
2. The state's tourism office should be strengthened to provide more effective support and leadership for the industry. The recommended format is that of State Tourism Organization (or a Public/Private Partnership body), in accordance with accepted best practice.
3. The role of the Director of the South Carolina State Tourism Organization should be strengthened by making it a permanent Chief Executive position.
4. The present approach of the RTOs/ CVBs in promoting tourism products/activities within the boundaries of the state's eleven tourism regions should be reviewed with the aim of moving to a future "destination" approach of eight (Tourism Destination Areas) involving expanded tourism flagship products, clusters & circuits appealing to a range of markets & segments.(see Appendix 1)
5. This review should include examination of the expansion of the role of the RTOs/CVBs to include new product development support, thereby acting as an extension of the state tourism organization. It is recognized that technical assistance and financial resources will need to be provided by the state.
6. The role of the state tourism organization should be expanded to include a new Product Development Department (PDD). The PDD would produce a state Product Development Plan, updated annually, and provide technical assistance and financial support for new product development, and refurbishment/upgrading of existing private sector tourism facilities and amenities.

7. A system of grant assistance to the private sector should be established as an incentive for new product development. Such an approach is widely accepted as best practice around the world as a successful means of developing tourism product in line with policy.
8. The state tourism organization should also strengthen its market research department with the recruitment of additional experienced market research personnel.
9. Major increases in funding should be sought by the state tourism organization from the state government, for the proposed product development department, the grant assistance program, marketing and promotion (including the increased market research capability) and the professional personnel to accomplish this expanded range of activities.
10. A Regional Tourism Co-ordination Manager (RTCM) should be appointed within the state tourism organization to facilitate the delivery of a state-wide integrated tourism policy. The RTCM should have a seat on the board of all the RTOs/ CVBs.

Access

1. South Carolina must take a broader approach to the attraction of increased airline service operations into the state, focusing on a tourist region coupled with featuring the state's attractions as compared to competitive destinations. The recommended approach involves: packaging the South Carolina story; identifying new service objectives; targeting airlines for each objective; establishing procedure to contact the airlines; offering appropriate, and marketing coordination.
2. South Carolina's approach should be a targeted effort, with proposals and justifying data for specific markets. The key objective for international service is to attain at least a minimum level starting point that can grow based on market performance. Targets should include: Toronto, London, Frankfurt, Ireland. Other goals should be to attract a new domestic low cost carrier and to increase capacity to primary hubs.
3. Once target airlines and key contact personnel have been identified, a regional South Carolina contact group representing the key constituencies for airline visitation should be established, a visit should be made to the airline with a specific proposal supported by economic and traffic data, new information should be provided to bolster the airline's normal statistical forecast, a local site familiarization visit should be offered to key decision makers, and a procedure set up for supplying periodic local updates.
4. The waiver of landing fees and strong promotional support should be offered as inducements.
5. If the need is established through the North Eastern Strategic Alliance study that a new regional airport is needed, it should be sited so as to serve the local convention traffic in the Myrtle Beach area as well as enable the consolidation of other small

airports serving the same region. Alternatively, the existing Myrtle Beach airport should be expanded.

6. The Interstate highway network should be completed both to facilitate access to the coast and to expedite emergency evacuation in the event of a hurricane threat.

Tourism Planning and Product Development

1. A long term approach to tourism planning and product development is recommended supporting market-led developments that are integrated, environment protective, clustered, enhance social economic benefits and provide a full range of day and night time experiences.
2. To increase the economic and social benefits of tourism and achieve a better spread of tourism, it is proposed that the tourism developed areas along the coast improve access and develop high yield products. Inland, quality activity, heritage and culture products should be developed in clusters.
3. The state parks are an important state asset. It is recommended that ten be selected as a special flagship project for major development by way of upgrading the accommodation and establishing new activities and nature outdoor activity schools.
4. To overcome the present fragmentation development of tourism attractions and facilities outside the coastal region and to give a focus to development, eight separate character zones have been identified as potential Tourism Destination Areas (TDAs). Each TDA has a combination of attractions creating clusters and underpinned with flagship projects. (see Appendix 1 for TDA Proposals).
5. It is proposed that planning work should commence on a series of forty-nine pilot demonstration projects, selected to include:
 - ❖ Parks, Lakes and Beach Improvements
 - ❖ Historic and Culture Sites
 - ❖ Arts and Crafts
 - ❖ Discovery Routes and Heritage Trails
 - ❖ Waterfront and Resort development
6. Eleven Priority Flagship Projects are proposed to give a focus to the TDAs, these being dependent on state funding and incentives to influence private sector investment.
7. With the involvement of all stakeholders including the private sector, government and communities and NGOs, plans should be developed for each TDA. These will set out the strategic approach and development guidelines, briefs and usages.
8. A visitor information program should be developed to establish and promote a network of scenic routes with appropriate signage and information to link destinations and facilities. It should comprise:

- ❖ Discovery Routes
- ❖ Nature and Heritage Trails
- ❖ Visitor Maps and Information Sheets
- ❖ Signage and Interpretation Panels
- ❖ Guide Books
- ❖ Websites

Market Evaluation, Strategy and Planning

1. An intensification of marketing and promotional support is needed to position South Carolina as a destination capable of attracting a major increase across a range of market segments in domestic and international markets, attracted by a diversified and high quality range of tourism products based on the state's natural, historic, and cultural assets. In the short term, marketing should be focused on established destinations in the state, being broadened out as new products in the interior of the state (i.e. flagships, clusters, and integrated circuits) come on stream.
2. Research should be conducted on a continuous rolling basis in primary metropolitan centers through intelligence gathering at trade exhibitions and discussions with tour operators. In addition, a continuing program of research is needed with tour operators, airlines and travel agents in those markets identified as representing the greatest potential for the state. The ongoing trade research should feed into the design of an in-depth series of consumer surveys into the profile, characteristics and trends of major markets and segments within those markets. The research should cover motivational, attitudinal and behavioral facets. At least two major studies a year should be undertaken.
3. A mixed program of trade- and consumer-directed public relations, advertising and promotional activities is proposed. The trade program features: familiarization trips, trade shows/fairs, tour operator/travel agent workshops etc, tour operator support, travel agent's manual and trade advertising.
4. The consumer marketing program should comprise a combination of:
 - ❖ extensive development of a *tourism website*;
 - ❖ an extensive program of *facilitating travel* in the state for writers, photographers and film crews representing prestigious publishers and broadcasters, in order to extend the number and spread of positive *editorial features* on South Carolina;
 - ❖ extending the range of high quality *collateral and audio visual materials* on South Carolina's tourism;
 - ❖ undertaking a *direct mail campaign*, providing a sufficiently tightly

targeted mailing list/lists can be acquired i.e. memberships of historical societies, golf clubs, adventure and sports societies and clubs, ecotourism associations;

- ❖ a major, multi-media *consumer advertising* campaign in the domestic U.S. and Canadian markets, and in selected magazines and other media with a proven high readership/circulation/viewership among the targeted segments in European markets.
5. The newly-launched Discover South Carolina website represents a “jumping off” point for additional investment in electronic marketing and is strongly endorsed.
 6. A review should be undertaken of all collateral materials distributed via the state Welcome Centers with the view to synchronizing and reducing the volume of publications.
 7. It is recommended that the format and content of the state’s tourist handbook - *Smiles* – should be reviewed with the intention of radically reducing its size and cost of production.
 8. To maintain a U.S. domestic market consumer advertising campaign across the full range of relevant media throughout the year demands a minimum annual budget of \$10 million a year, divided \$5 million for network/cable TV, \$2 million print-based, all co-operative building on the TV work, and \$3 million for interactive marketing. There will be a need to widen the creative approach to focus on opportunity market segments.
 9. No general consumer advertising is proposed in European markets – at least for the short term; the consumer advertising recommended should be directed at those publications aimed at specific market segments and niches identified, in particular golfers, history/culture enthusiasts, outdoor pursuit/adventure participants, nature/wildlife – ecotourism – enthusiasts.
 10. The small budgets of the two overseas representative offices contracted by the SCPRT in the UK/Ireland and German markets prevent the achievement of any substantive progress in developing these markets’ potential. It is recommended that these operations should remain contracted but with budgets some two-to-three times present levels.
 11. Once the results of the major consumer survey recommended for Year 1 in the Canadian market have been finalized, steps should be taken to appoint a market representative agency to coordinate a major program of marketing and promotional activities covering the Ontario and Quebec markets.
 12. The present level of marketing budget is insufficient either to fully penetrate the targeted markets and segments or to realize the state’s full potential from tourism. The key areas where budgetary expansion is needed are:

- ❖ greater penetration in domestic leisure market through increase in media appropriation to \$10 million a year;
 - ❖ annual allocation for consumer marketing activities in the international markets of Canada, the UK/Ireland, Germany, Scandinavia, France – as primary European markets – of between \$0.5 million (France, as an emerging market for the state) and \$2.5 million (Canada, an under-exploited market) i.e. total of over \$5 million a year; and
 - ❖ increase in market segment studies, and the regular – quarterly - collection of key tourism performance and trends statistics (with dissemination to the state's tourism stakeholders) through an increase in the market research budget of \$0.5 million a year.
13. In aggregate, it is proposed that the state tourism marketing budget should be increased to between \$30 and \$31 million a year over the next five years. The principal emphasis should be on advertising - \$16 million a year across all markets – consumer PR and promotions - \$6 million a year each – and the extension of electronic marketing activities - \$3 million a year.
14. The marketing budget should be financed jointly by the state and the private sector. The latter's willingness to contribute a significant share of funds will be a function of the closeness of the working relationship achieved through the proposed public/private sector marketing partnership and the tourism industry's perception of the degree of relevance to its own objectives of the marketing strategy and program.
15. It is proposed that a detailed study should be made of the Maison de la France statute of establishment, partnership agreements and mode of operation. A mission to Paris for this purpose should be organized for a joint public/private state delegation.

Human Resource Development

1. High schools - it is recommended that: private sector involvement in SCDOE Standards Committees and within School Advisory Boards should be increased; the relevance and value of optional electives should be reviewed; the use of university level course study units should be prohibited; funds should be sought to improve the layout of practice kitchens; monthly targets for clearly-defined skills achievement objectives should be set; minimum funding levels for consumable supplies for training should be set; kitchen/lab assistants should be appointed to assist in practice sessions; the issue of student attrition should be addressed to establish the reasons; and more rural schools should be encouraged to adopt the AH & LA hospitality operations program.
2. Technical colleges - it is recommended that: the position of accommodation services within general hospitality programs should be reviewed; all food service courses should include tutor-supervised service practice serving complete meals; college administrators should accept the need for non-standard timetabling for hospitality

- programs; conversational Spanish language programs focusing on workplace communications should be introduced; and advisory board members should have greater involvement in the affairs of the department.
3. Universities – it is recommended that: the membership of advisory boards and steering committees should be reviewed; course electives should be reviewed; the topic of housekeeping operations within hospitality management programs should be enhanced; and a major restructuring of the practicum and internship programs should be carried out.
 4. Private sector – it is recommended that: all operators should set aside a set percentage for training and staff incentive programs; the Hospitality Association of South Carolina should fund scholarships to assist AH & LEI's lodging operations graduates to move onto associate degree programs; the Tourism and Hospitality Education Foundation should enter into discussions with the universities to redefine arrangements for internships; the industry should be more vocal and resolute in its relationships with the teaching institutions; and employers should accept greater responsibility for staff motivation, in-house training, and staff member career development.
 5. Rural workforce – it is recommended that: the state government, the educational institutes and the private sector should combine resources to launch a statewide Tourism Awareness Program; special efforts should be made to reach into the rural communities to better inform local organizations, school teachers, parents, and those seeking gainful employment, of what tourism means to the state, and of the opportunities open to all who wish to benefit from the job opportunities; the Hospitality Association of South Carolina should investigate WIA funding for an industry training initiative using itinerant trainers to deliver targeted pre-employment programs for those seeking employment within the sector; and the state department of Education in partnership with SCHAEF should seek to secure a scholarship program for high school students who successfully complete the AH&LEI Lodging Management Program.

5. ACTION AND IMPLEMENTATION PROGRAMS

5.1 Actions

The six major actions proposed have a suggested priority implementation order as follows:

Priority one	Tourism Organization State and Private Sector
Priority two	Marketing Actions
Priority three	Access Activities
Priority four	Product Development Actions
Priority five	Human Resources Development Actions
Priority six	Economic Actions

5.2. Implementation Programs

The various actions outlined above are presented below as a set of programs with the organizations responsible for implementation and level of priority indicated.

Tourism Industry Organization State and Private Sector

No.	Action	Rationale	Responsibility	Priority
A.1	Establish a Tourism Industry Confederation (Private Sector)	To provide the tourism private sector with a single, cohesive & cogent voice	Tourism Cluster Committee	1
A.2	Establish a State Tourism Organization (STO) or Public/Private partnership body - with a permanent Chief Executive Officer, and with private sector representation on its governing board	To ensure both consistency of policies & program; and full stakeholder representation in policy & strategy decisions	Governor and State Legislature	1
A.3	Widen the role of the proposed STO to include product development	To support the development of a full range of tourism product opportunities across the state in order that all communities may benefit from tourism	Governor and State Legislature	2
A.4	Provide a major funding increase for the proposed STO for administration, marketing (including market research) & product development	To provide the state tourism organization with the technical skills & budgets to realize the State's potential through product development & market research/marketing	Governor and State Legislature	3
A.5	Establish an incentives regime for tourism product development	To encourage private sector investment in appropriate tourism product developments	Governor and State Legislature	4
A.6	Preparation of a state Product Development Plan	To guide the allocation of technical resources and financial support for new product development and upgrading/refurbishment of existing facilities	STO	5

A.7	Establish a regional “coordinator” to act as the link between the PRT/proposed STO and the regional organizations	To ensure consistency of approach to product development & marketing between the “center” and the regions	STO	6
A.8	Upon establishment of the proposed STO, review the regional organizational structure for tourism across the state, in order to support product development and the establishment & operation of “destinations” based on these products	To orient the role of regional organizations towards tourism patterns & activities based on destinations, clusters & circuits	STO	7

Marketing Strategy and Program

No.	Action	Rationale	Responsibility	Priority
B.1	Focus short term marketing on the established coastal destinations	To generate increased demand from a wider cross-section of tourist markets	STO working with RTOs/CVBs and the private sector	1
B.2	Conduct extensive market research into major tourist generating markets and market segments – both through ongoing trade research and in-depth surveys – two a year	To develop a strong factual base to underpin the design of the state's and individual operators' marketing and promotional activities	STO	2
B.3	Establish a marketing board comprising representatives from the STO and the private sector representative body proposed in A.1	To develop marketing and promotional strategies and programs that are fully supported by both public and private sector, and jointly funded through partnership	STO and private sector representative organization	3
B.4	Conduct a detailed study of the Maison de la France public/ private marketing partnership	To ascertain an appropriate model for the proposed South Carolina public/ private marketing partnership	A joint STO/private sector representative body committee	4
B.5	Develop and conduct a trade-oriented marketing program comprising familiarization trips, trade shows/fairs, tour operator/travel agent workshops, tour operator support, travel agent's manual and trade advertising	To increase the familiarity of the travel trade with the South Carolina tourism product and to persuade increased features of the state in tourist programs	As B.3	5
B.6	Develop and conduct a consumer-oriented marketing program comprising website development, hosted media trips to the state, collateral and audio-visual materials, a selective direct mail campaign and multi-media consumer advertising	To increase consumer familiarity with, and interest in, South Carolina as a vacation and convention destination	STO	6

B.7	Within the program outlined in B.5, allocate \$10 million a year over the next five years to the U.S. domestic market: \$5 million for TV advertising, \$2 million for print, and \$3 million for electronic marketing	To increase the spread and penetration of domestic U.S. markets and segments	STO	7
B.8	Allocate a minimum annual budget of \$5 million for marketing in international markets	To increase the spread and penetration of the Canadian and European markets and segments	STO	8
B.9	Review the collateral material presently produced – including the <i>Smiles</i> - handbook	To reduce the overlap and costs	STO and RTOs/CVBs	9
B.10	Broaden out the focus of the marketing strategy and program in the medium and long term to include all developments in the TDAs	To generate visitor demand – and economic benefits - for all parts of the state	STO and RTO's /CVB's	10
B.11	Focus on establishing South Carolina as a tourism "house of brands"	To create the reputation of South Carolina as a major tourism state with a varied range of destinations catering for different market segments and interests	STO	11

Access

No.	Action	Rationale	Responsibility	Priority
C.1	Set up a regional South Carolina contact group to make representations to prospective new and existing airlines	To attract air service from new sources and increase frequency of existing services to Charleston & other airports in the state	STO/Contact Group	1
C.2	Develop a package of information and develop a system of contact with target airlines	To present the benefits to the target airlines of operating direct service to Charleston	Contact group	2
C.3	Visit target airlines and invite them to inspect South Carolina	To attract the target airlines to offer services	Contact group	3
C.4	Develop financial and promotional incentives	To attract the target airlines to offer services	Contact group	4
C.5	Upgrade the facilities at Myrtle Beach airport – the degree to which will be determined by the results of C.4 above	To provide the additional capacity to meet growing demand, particularly from the convention market	Contact group with Myrtle Beach interests	5
C.6	Expedite the extension and improvements needed to the interstate highway network to the coast	To bring road access to the standard necessary to meet visitor demand and hurricane evacuation purposes	STO and coastal tourism interest in liaison with relevant state government departments	6
C.7	Support new regional airport study	To establish the need for such an airport e.g. to serve the convention market in Myrtle Beach	Contact group	7

Tourism Planning and Product Development

No.	Action	Rationale	Responsibility	Priority
D.1	Establish a Product Development Division in the State Tourism Organization	To prepare a State Tourism Product Development Plan – as per A.6 – and to provide guidance to the tourism planning groups in each of the TDAs	STO	1
D.2	Adopt the proposed 8 TDA network and prepare plans for 11 flagship projects, attraction/facility clusters, and integrated and themed tourist circuits	To develop a framework of substantive tourist products in all parts of the state capable of drawing in visitors from different market segments and maximizing their stay and spending	STO working with the RTOs/CVBs, local authorities and private sector	2
D.3	Commence planning and implementation work on the 49 identified pilot demonstration projects	As D.2	As D.2	3
D.4	Design and implement flagship projects in ten selected state parks	To develop upgraded accommodation facilities and new activities and facilities	STO working with State Parks, National Forest, RTOs/CVBs and local authorities	4
D.5	Develop and distribute financial and other incentives, as appropriate – in line with A.4	To ensure private sector investment in the identified flagship tourism projects	STO	5
D.6	Improve access to, and develop high yield products, along the coast	To achieve strong demand growth across a wider range of market segments than at present	STO working with local and private sector interests	6
D.7	Establish a Visitor Information Program (VIP)	To promote a network of scenic routes with appropriate signage and information	STO working with RTOs/CVBs	7

Human Resource Development

No.	Action	Rationale	Responsibility	Priority
E.1	Design and launch a tourism public awareness program	To better inform the population of South Carolina – particularly in the rural areas – of the role of tourism in the state and to attract more entrants to the industry	state government, educational institutes and the private sector	1
E.2	Review and implement the proposed reviews and actions in respect of tourism education and training in high schools, technical colleges and universities	To reduce the level of attrition in study programs; and to improve and complete students' preparation for employment in the tourism and hospitality sector	High schools, technical colleges and universities working with the SCDOE Standards Committee, Advisory Boards/Steering Committees, and the Hospitality Association of South Carolina	2
E.3	Private sector to set aside a set percentage for training and staff incentive programs	To increase staff motivation and reduce turnover	Private sector operators	3
E.4	Establish a scholarship program for lodging operations graduates to move on to Associate Degree Programs	To increase the supply of well-qualified management personnel	Hospitality Association of South Carolina	4
E.5	Establish a stronger industry relationship with teaching institutions	To ensure the teaching programs meet industry needs	Industry and teaching institutions	5
E.6	Investigate funding for the creation of a mobile training team	To deliver pre-employment training programs	Hospitality Association of South Carolina	6

Economic Impacts

	Action	Rationale	Responsibility	Priority
F.1	Include induced impact in tourism's economic measurement	To gain full picture of tourism's economic contribution	State Tourism Organization - STO	1
F.2	Calculate state taxation revenue from tourism on an annual basis	To enable government to assess its expenditure: return ratio	STO	2
F.3	Investigate possibility of working with values "at basic prices"	To obtain a more precise impact estimate	STO	3
F.4	Present travel & tourism data as three separate & distinct events: direct expenditure; travel & tourism-related expenditure; and outbound travel & tourism expenditure	To give clarity & understanding of the different categories of spending	STO	4

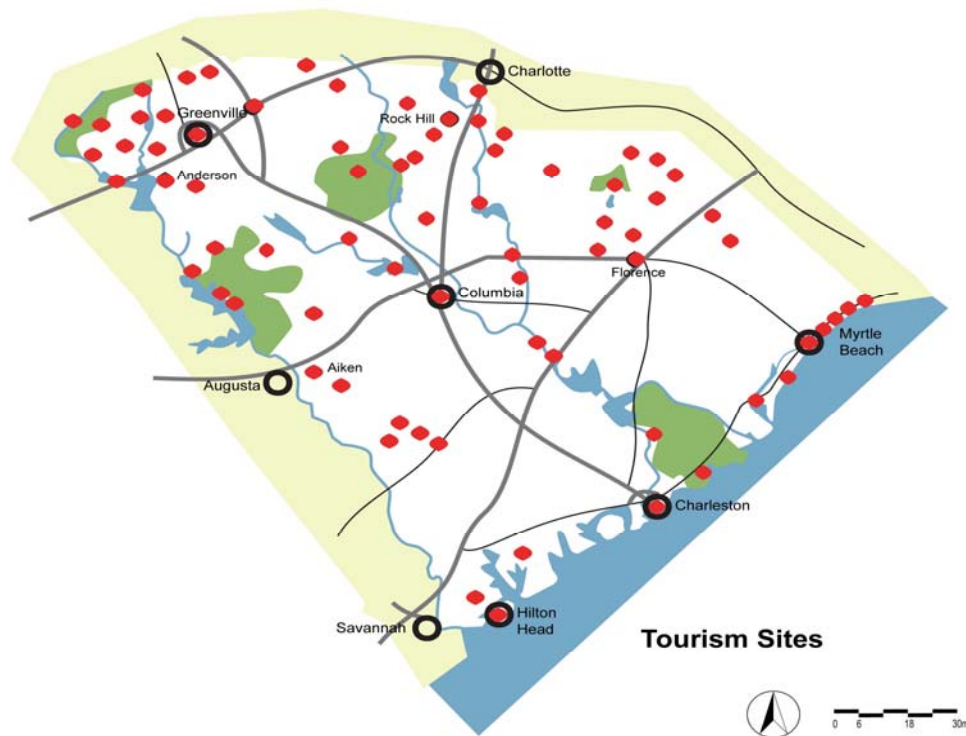
APPENDIX 1 – TOURISM DESTINATION AREAS

(Extracts from Volume two of the Action Plan)

1.1 TOURISM DESTINATION AREAS (TDAS)

The state does not currently enjoy a cohesive identity from a tourism perspective. It is in reality a group of administrative regions encompassing a diversity of destinations, which range from high-tech industrial cities to pristine nature environments, from city centers to quiet lakes. Rather than being a destination itself, the state is a collection of varied destinations, each with a separate identity and appealing to different markets. It is therefore important that these individual characteristics are recognized and promoted in the Tourism Action Plan.

A number of Tourism Sites (TSs) have been identified. TSs comprise significant natural and cultural heritage sites, areas of attractive landscape, and other attractions where activities take place and are key sites for tourism development. Most of these sites were visited by the study team and brief descriptions and comments on development potential are provided in the Appendix.



The following development principles were used by the team in identifying Tourism Sites.

Significance of Tourism Features

Significance is one of the key feasibility elements used in identifying tourism sites in product evaluation, especially for international visitors. As has been already pointed out, although there are a number of cultural and natural assets which can be developed into attractive tourism experiences, building on the attractiveness of significant features will make the task much easier. This, for example, is why there is such interest in and around Charleston by various developers.

Distinctiveness

Distinctiveness enables one tourism region or area to be differentiated from another. In some places, for example, the natural assets may be interesting but not spectacular (as in the case of many of the National Forests and Parks). However, by tapping into the right target market segments, providing a quality experience, ensuring authenticity, as well as a strong local identity and involvement, a strong appeal and unique selling proposition can be created, which allows an attractive and feasible tourism offering to be developed. The development of the historic town of Cheraw is a good example.

Clustering

It is quite common to find cultural, heritage or natural assets scattered in a region (e.g. in the Olde English District and Pee Dee Country) where the sites are relatively distant from each other. While some towns may individually have strong lure potential, many of the other tourism assets in the immediate and adjacent areas do not constitute individually strong lures. However, clustering them, and developing itineraries, will increase their attractiveness. Similarly, developing themes and links between various products will strengthen their attractiveness, and will also allow “weaker” potential products to tap into the lure potential of more attractive individual products.

To this end, eight separate character zones have been identified, each an existing or potential Tourism Destination Area (TDA).

T.D.A. 1. Central Core – *Capital and Lakes District – for business and recreation*

T.D.A. 2. The North West – *Foothills and Arts Country – where adventure and sophistication meet*

T.D.A. 3. The Mid West – *Horse and Forest Country – explore the outdoors*

T.D.A. 4. Hilton Head – *Treasured Coast – international-standard refinement and exclusivity*

T.D.A. 5. Charleston – *History and Southern Experience Center – all the best of South Carolina*

T.D.A. 6. Myrtle Beach – *Vacation and Convention Capital of South Carolina – destination for all tastes*

T.D.A. 7. The East – *Swamp Fox Country – Francis Marion land*

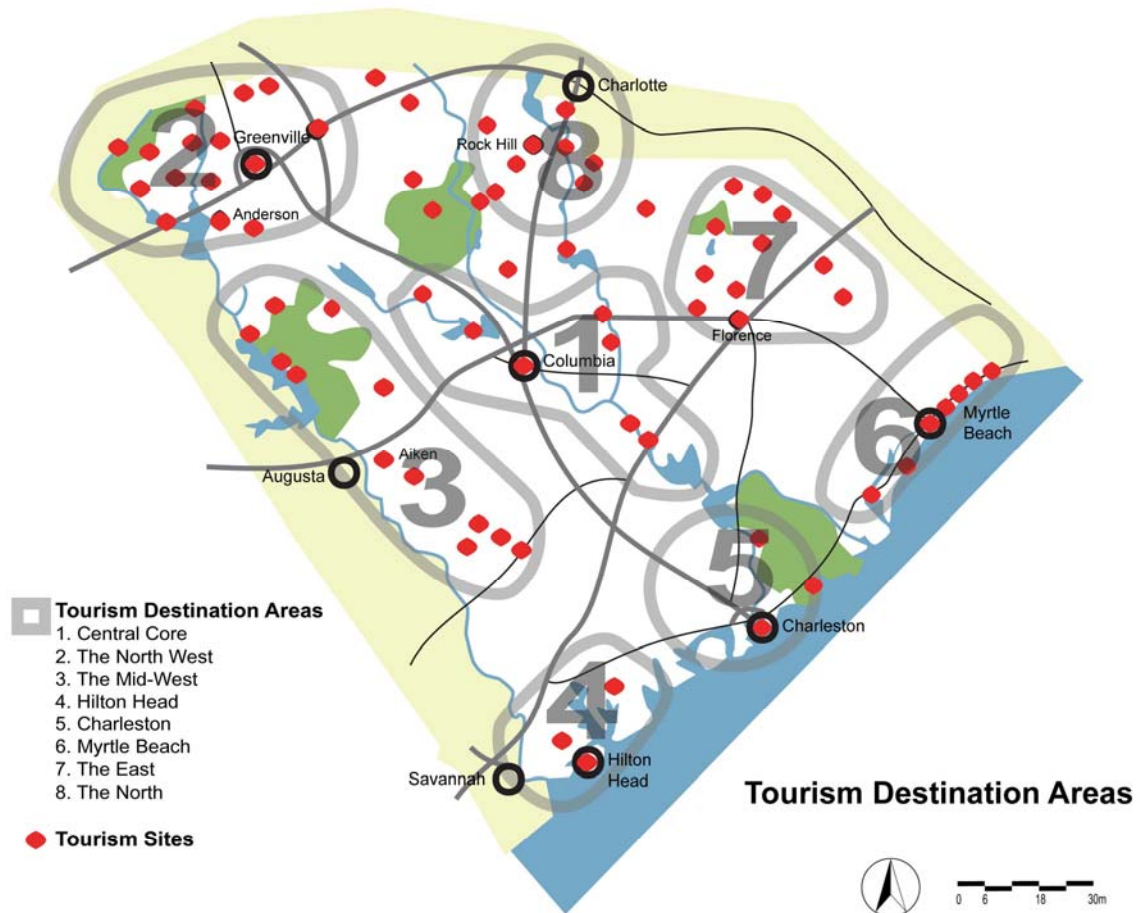
T.D.A. 8. The North – *Center for All Times – taste the past, feel the present*

A tourism ‘destination’ is a center which draws visitors to stay a considerable period by virtue of a combination of attractions, facilities and amenities which meet their various interests and needs. The coastal area of South Carolina is characterized by ‘destinations’ that are distinct, distinctive and established. By contrast the interior, with the exception of Greenville, has no tourism products of substance and, in consequence, there are no tourism “destinations” outside of the coast and Greenville. What is required is the creation of “destinations” through product development. This can be done in a number of ways, some of which are:

- ❖ creating and marketing “clusters” of small and mid-scale attractions to constitute circuits or trails; and
- ❖ developing “flagships” in respect of a particular theme related to identified market segments, and using these as the magnet to draw visitors in to an area and then “spinning” them out to other related sites on the ‘hub and spoke’ basis.

These approaches can only be effective if the themes/segments around which the products are based are marketed as individual destinations. Each of these destinations within the state has its own strengths, weaknesses, opportunities and threats, but share certain characteristics, which prevail in the state as a whole.

The map showing the Tourism Destinations is conceptual. The boundaries will need to be further defined by the locations of the products, facilities and services that are within the areas.



The **Tourism Destination Areas** are proposed to form clusters that can be developed. These clusters will then constitute the embryos for the growth of the industry in South Carolina. (These areas are dealt with separate maps/details on pages which follow).

The **Central Core** is centered on Columbia the State Capital with a concentration of facilities and services. The development of the “River Alliance” and the “Vista” area will give Columbia a recreation focus linked to the lakes and surrounding rural areas.

The **North West** focus is to maintain the rich heritage and natural environment, regeneration of the main towns including the Garden City, crafts and adventure.

The **Mid West** is the equine center that would become a national horse center majoring in horse racing, stud farms, riding and hunting.

The **three Coastal Areas** of Hilton Head, Charleston and Myrtle Beach have the coast as their main link, golf will remain as the principal recreation product. Charleston is the icon of South Carolina and Myrtle Beach needs re-positioning.

The **East** is a rural and rural towns area rich in Revolutionary War heritage – the Swamp Fox and many battle sites. Rural / farming life and rural towns will form an attractive visitor experience.

The **North** can be a center for the Revolutionary War linked to the East with many heritage towns, the arts and parks development.

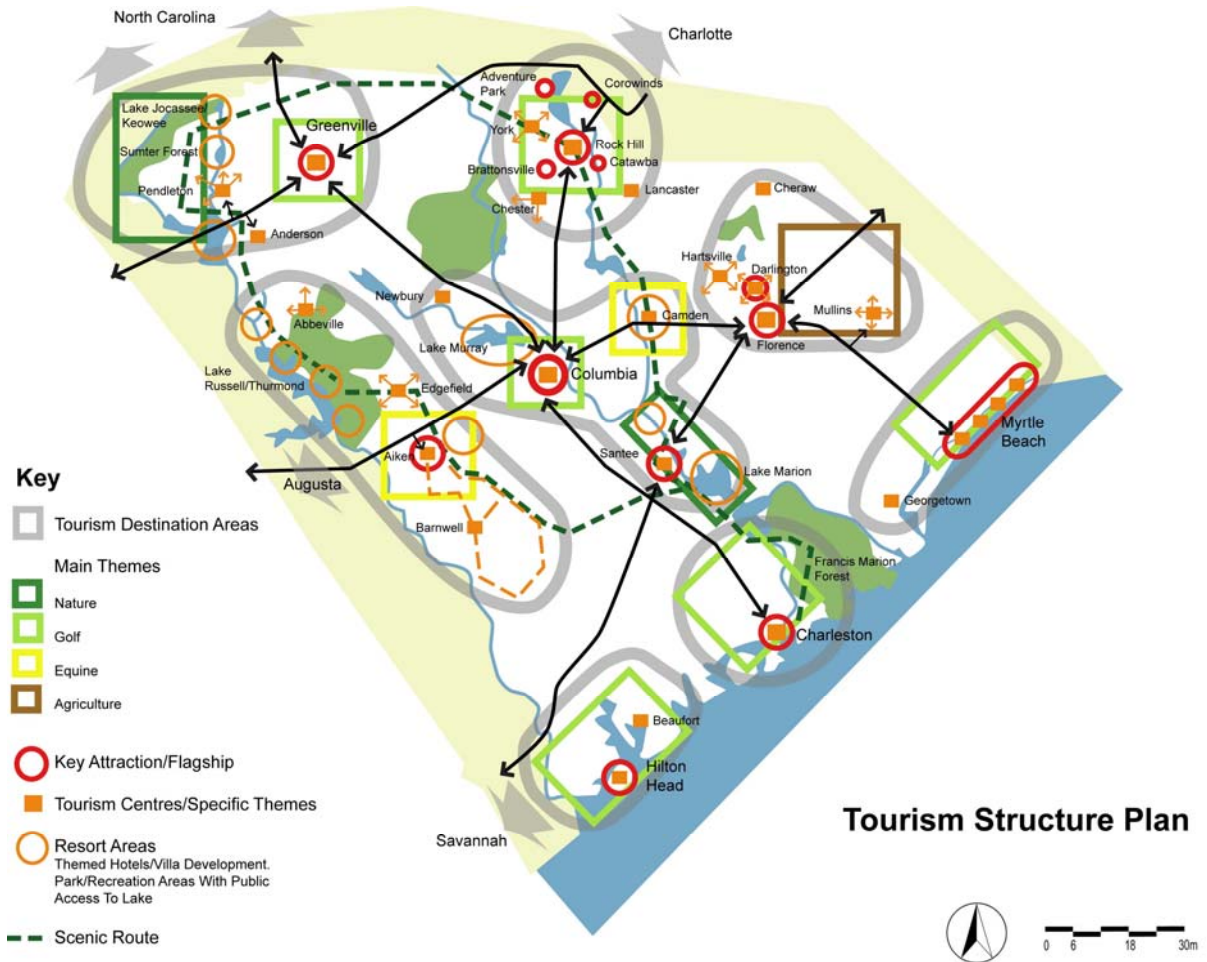
Chapter 6 **Marketing Strategy**, section 4.3, identifies a set of possible marketing handles for the eight TDA areas.

1.2 TOURISM STRUCTURE PLAN

Designation of TDAs provides the basis for integrated planning of the entire South Carolina state so that it functions efficiently and is relatively self-contained.

The Tourism Structure Plan focuses on:

1. Building on the strengths of the Hilton Head, Charleston and Myrtle Beach coastal areas with emphasis on ‘branding’ according to development, type of experience, etc. The intention is to have a series of differentiated products that will be very different from the other states and will be much more in keeping with South Carolina and future demands of the markets.
2. Developing the nature, heritage and community based tourism product in the north, the east and west in a more intensive and commercial manner, offering an experience, but not compromising the integrity of the resource.
3. Creating marketable clusters of products supported by facilities and services to attract visitors for what will be a destination experience.
4. Developing tourism centers with specific themes and for impact identifying and creating flagship projects as key attractions across the state.



Anchoring and Linking TDAs and TSs

Clustering:

In order to attract more tourists to the TDAs, induce them to stay longer, and be convenient for tour/ground operators, various sites and attractions have been combined or linked in one area. It is very important for the state to develop a product that effectively integrates sites, attractions, events, activities, and associated accommodation. This clustering of sites is particularly applicable to The Mid West, where each attraction should be developed and packaged showcasing authentic products (crafts, events, services, products, experiences) and given a place on an itinerary to achieve a strong appeal.

Similarly, creating larger programs or festivals out of a series of individual local events (village fairs, horse trials, or more special events) should be achieved, clustering these attractions through coordinating dates, content and publicity.

Theming:

Clusters may be made more attractive by developing and building on themes likely to interest potential visitors. Themes may enable product differentiation. Main themes for South Carolina include:

- ❖ nature (forest areas and lakes, soft adventure)
- ❖ golf (Hilton Head, Charleston, Myrtle Beach, Greenville, Rock Hill, Columbia);
- ❖ equine (Aiken, Camden); and
- ❖ Rural (The East).

Key Attractions:

Key attractions are usually to be found within the city/town centers:

- ❖ Hilton Head, Myrtle Beach, (golf, beach);
- ❖ Charleston, Columbia (heritage);
- ❖ Columbia, Florence, Rock Hill (sports/events);
- ❖ Darlington (NASCAR);
- ❖ Greenville (town center/park/river)
- ❖ Aiken (equine).

However, there are a grouping of key attractions within the North TDA including Carowinds Theme Park and Historic Brattonsville. Key attractions as flagship projects need to be developed to create strong spotlight attractions throughout the state for the visitor.

Tourism Centers/Specific Themes:

Specific tourism centers have been identified. Key themes will need to be identified for each center such as:

- ❖ heritage;
- ❖ culture;
- ❖ arts;
- ❖ antiques;
- ❖ sports;
- ❖ events;
- ❖ rural/agriculture;
- ❖ shopping;
- ❖ beach; and
- ❖ marine.

Themed visitor centers are identified for each TDA. The purpose of the visitor center would be to provide structured environmental education and a concentration of facilities, services and information for tourists.

Resort Areas:

Resort areas are identified to encourage integrated planning and protection of the environment. They will include

- ❖ themed hotels/lodges/ranches;
- ❖ villa development to support nearby heritage sites and towns; and
- ❖ park and recreational areas around lakes.

The concentration of resort areas will also:

- ❖ make more efficient use of infrastructure;
- ❖ concentrate development to support more specialized facilities; and
- ❖ provide a variety of facilities in one area to meet a wide diversity of tourist needs.

Themed Routes and Trails:

Specialty routes enable visitors to focus on themes. This allows them to choose a particular experience (nature interpretation, heritage, the coast, eco/agro production etc.). Within this framework, a trail system can be developed to offer a mix of recreational settings from remote to urban. The Heritage Corridor has become a major theme for promoting tourism in South Carolina. However, the Corridor is sparse in the things to do and lacks linkages and interpretation along the way. It should also be noted that it covers only a portion of the heritage areas in the state. The TDAs and the identification of heritage towns will provide a more focused marketable experience which can be linked by an identified scenic route from which a variety of trails can be developed.

State Parks

The State Parks are an outstanding asset and ideal for the development of major centers for activity, recreation, nature, and eco tourism for residents and out of state visitors. If developed they can play an important role in repositioning South Carolina as a distinctive tourism destination.

At present they enjoy a very loyal patronage with a high level of repeat visits particularly by families and some second-generation families.

To attract new visitors they need to be developed. It is proposed that ten parks be selected for major development as a separate Flagship Project. Upgrade and expand the overnight accommodation and make it more attractive by more upmarket design, fixtures and fittings as well as new decks and outdoor and recreation facilities around the accommodation units.

Open adventure trails and exploring trails. Establish fishing, boating, sailing, scouting and hunting schools within the parks. Provide guided fauna and flora tours. Organize camp-fire nights with participatory entertainment.

Integrating TDAs, TSs, Links and Themes

The overall concept aims to establish and promote a network of designated tourism circuits, scenic routes and trails, with appropriate signage and interpretive information that forms strong linkages with tourism sites and attractions, protected areas, visitor centers, community projects, events, and related experiences. There is a need to integrate all these elements, in terms of:

- ❖ delivering product experiences;
- ❖ raising awareness about exploring and discovering South Carolina; and
- ❖ marketing and promoting the product.

Investments made in the existing and proposed tourism sites probably cannot be justified on an individual basis alone. The real value of the investment will be achieved through integration strategies that present the sites in the context of an overall product experience. In this respect, well-organized tour routes and excursions, escorted by well-trained, knowledgeable and friendly guides, can make a significant difference to a visit.

1.3. CONCLUSIONS AND RECOMMENDATIONS

- ❖ To increase the economic and social benefits of tourism and achieve a better spread of tourism, it is proposed that the developed tourism areas along the coast improve access and develop high yield products. In the rest of the state, it is recommended that development should create quality activity, heritage and culture products in clusters.
- ❖ At present the state is a collection of varied diverse destination each with a separate identity and appealing to different markets. Many are not strong attractions on an individual basis. Clustering them will strengthen their attractiveness.
- ❖ The state parks are an important asset. Ten should be selected as a special flagship project for major development by way of upgrading the accommodation and establishing new activities and nature outdoor activity schools.
- ❖ Eight separate character zones have been identified as potential Tourism Destination Areas (TDAs)
- ❖ Each TDA has a combination of attractions creating clusters and underpinned with flagship projects. The Tourism Structure Plan focuses on;
 - Building on existing strengths
 - Developing nature, heritage and community based products
 - Creating marketable clusters
 - Developing centers and flagship projects as key attractions
- ❖ The overall concept is to establish and promote a network of tourism circuits and linkages between tourism sites and attractions within and between the TDAs.

2. ACTION PLANS

2.1 PROJECTS

The overall objective of the Product Development Action Plan is to enhance the existing product and develop a range of new products. This will be achieved through the following sub-objectives:

- ❖ to conserve, interpret and exploit the natural and cultural heritage sites and areas;
- ❖ to conserve, enhance and market the product – existing and new;
- ❖ to enhance the quality and extend the range of tourism products in developed tourism areas.
- ❖ to encourage the special spread of tourism to the underdeveloped areas;
- ❖ to encourage different types of accommodation to include high quality lodges;
- ❖ to introduce flagship developments (waterfront, equine and heritage themes) and a variety of things to see and do; and
- ❖ to promote community-based tourism development;

Forty-nine pilot/demonstration projects have been identified to begin the process of implementation of the Product Development Action Plan and include:

- ❖ natural resource development – parks, lakes and beach improvements;
- ❖ cultural heritage resource development - historic sites and interpretation;
- ❖ community development – promotion of soft culture, arts and crafts and small business enterprises;
- ❖ product promotion – discovery routes and heritage trails; and
- ❖ integrated planning – long-term waterfront, resort and recreational developments.

Projects have been identified for each Tourism Development Area.

2.2 FLAGSHIP PRIORITY PROJECTS

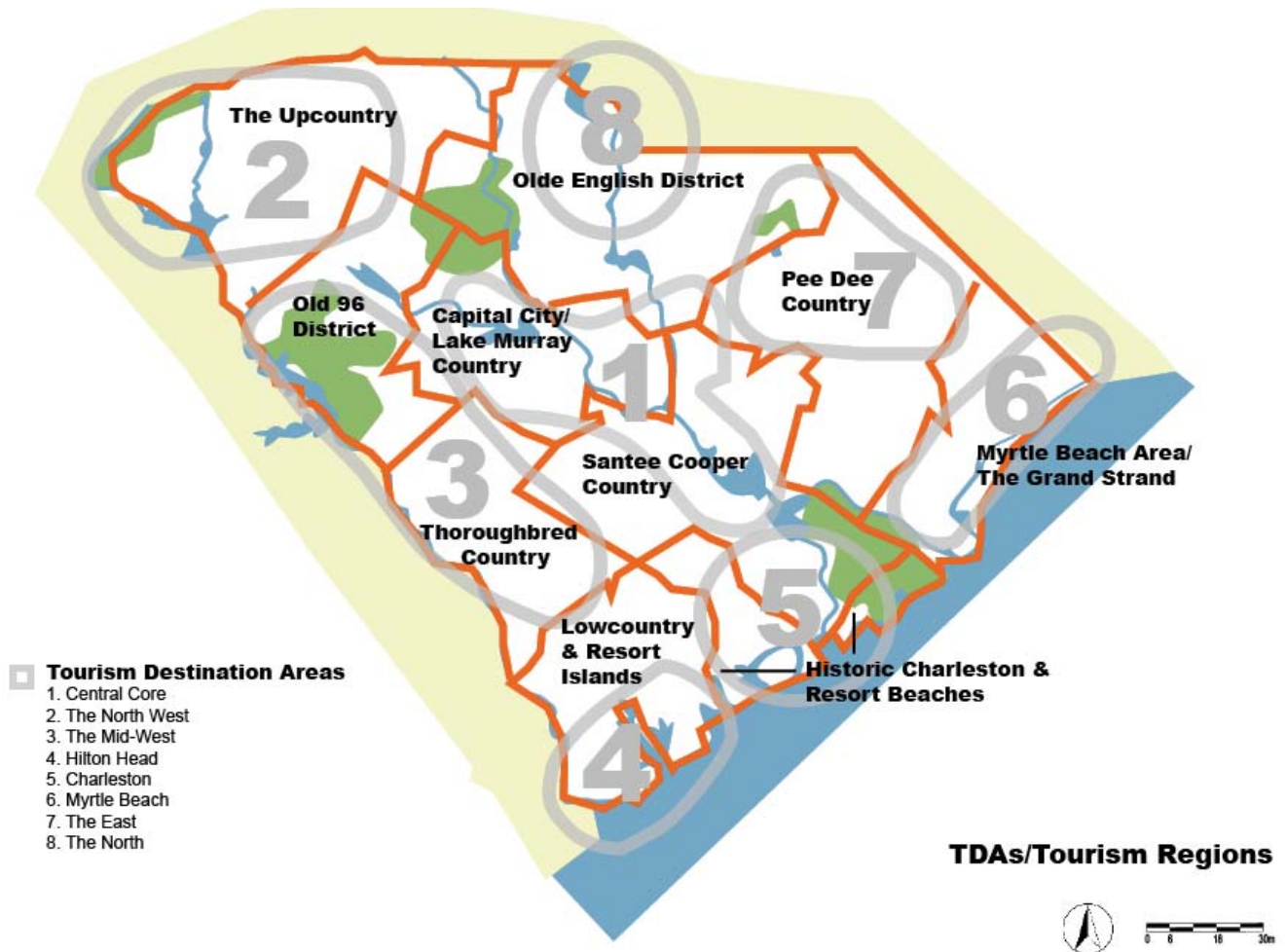
Eleven priority Flagship Projects are proposed to kick-start and give a focus to the TDAs. Their development will be dependent on state grant funding and other incentives to drive and influence private sector investment. Indicative capital costs are given where possible. These costs do not include site acquisition. Final costs will, of course, be dependent on detailed planning, size and quality of finish. These flagship projects have been proposed having regard to

- ❖ market need,
- ❖ existence of product components,
- ❖ potential to attract investment from the private sector/market,
- ❖ potential for employment and business opportunities,
- ❖ potential to create environmental benefits/awareness, and
- ❖ availability of infrastructure/ease of connection.

2.3 TOURISM DESTINATION AREAS

The eight Tourism Destination Areas span the existing Tourism Regions, with individual Regional Tourism Offices (RTOs) and Convention and Visitor Bureaus (CVBs) being responsible for more than one TDA and sharing responsibility with neighboring RTOs and CVBs. This will require the RTOs and CVBs coordinating their development and marketing activities and working closely with the state tourism organization.

The following map shows the cross over between the Tourism Regions and the Tourism Development Areas.



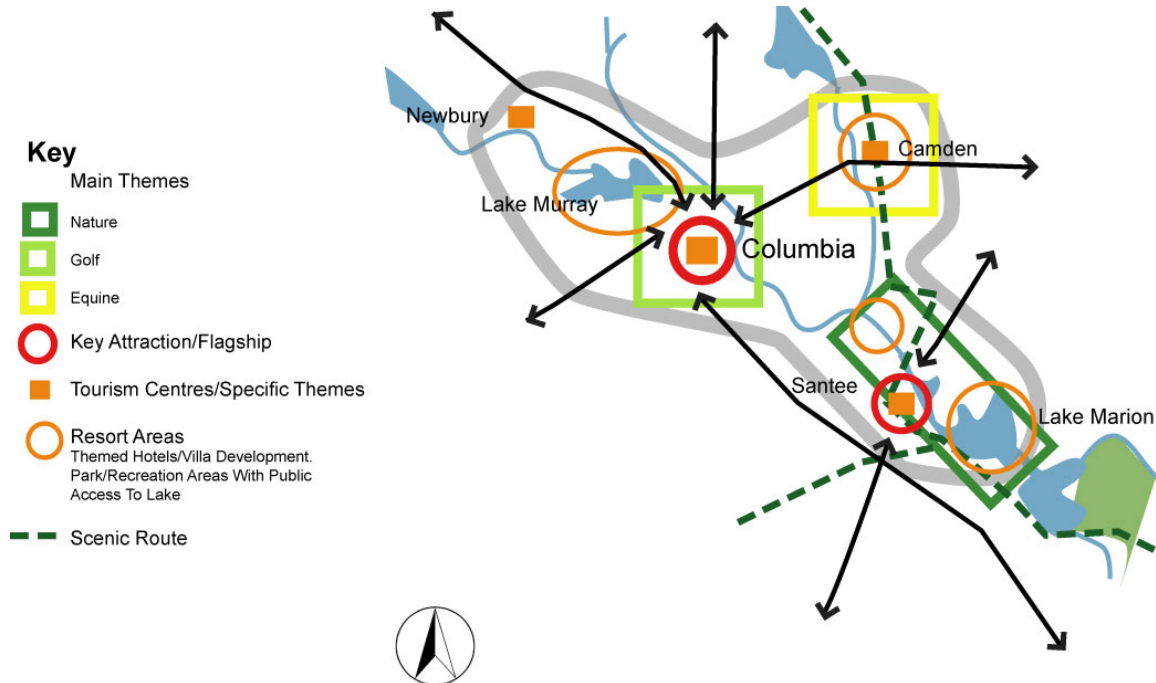
The RTOs and CVBs are situated in the following locations-

Irmo, Charleston, Point South (Yamasee) Myrtle Beach, Laurens, Florence, Pendleton, Santee, Chester, Aiken, Greenville, Columbia, Anderson, North Augusta, Georgetown, Greenwood, Hilton Head, Spartanburg, Sumter, and York

i. CENTRAL CORE

Columbia is the state's capital, university city and shopping destination. It provides a concentration of facilities and services, including a range of tourism accommodation, residential areas around large lakes and with good linkages to Newberry to the west and Camden to the east. The "River Alliance" and "Vista" areas development will give Columbia a recreation focus and make it a tourist center with the lakes, rural areas and towns providing nature and activity.

TDA 1: Central Core - Capital and Lakes District – for business and recreation



The following projects are identified for the Central Core:

- ❖ Columbia Urban Regeneration Program – Main Street, Vista, Five Points, University Area
- ❖ Newberry Town Center Improvement Program
- ❖ Camden Resort Development – identification of sites/briefs for flagship ranches
- ❖ Santee Town Center Improvement Program
- ❖ Lake Murray Development Strategy – planning controls, public access to lake
- ❖ Lake Marion Development Strategy – identification of sites/briefs for flagship resorts, planning/zoning for land and water, public access to lake, bird hides

Two Flagship Priority Projects are proposed for the Central Core:

Columbia - River Alliance

Columbia is maturing as the state capital. The **River Alliance** is developing the riverside area as a leisure area and refocusing the city towards the river which is a significant asset. This development should be accelerated to provide, among others, an integrated riverside development including a 4/5* hotel, consumer and residential developments (converting the old mills), a cruising base for canal cruising, rowing center, whitewater rafting, excavation/archaeological dig of war sites and earth works culminating in an active archaeological interpretative center.

To complement the Riverside Alliance development, the “Vista Area” and University quarter should be further expanded.

Indicative Cost \$125m.

State Interpretative Center - on I-95/I-20 Intersection Area

An opportunity exists to showcase South Carolina and its history, culture and the variety of attractions to the transit traffic passing through the state on the north-south/east-west corridors near the I-95/I-20 intersection. An Interpretative Center is proposed to tell the South Carolina Story This would include a menu of the state’s history, culture, South Carolina’s Native Americans, the slavery period, the state’s cuisine, music, dress, general lifestyles, the revolutionary and civil wars.

This would entice transit visitors to stop and visit other parts of South Carolina on their trip or to make a subsequent trip to do so.

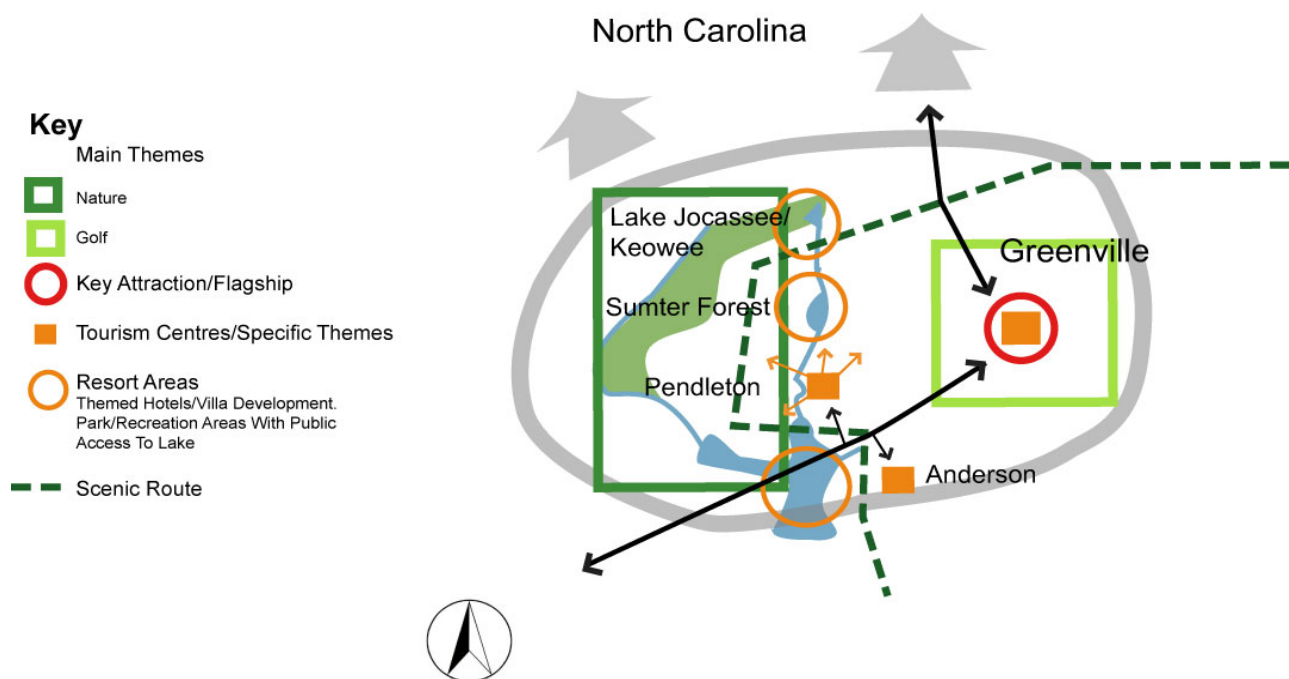
Santee is suggested as the possible location

Indicative Cost \$3m.

ii. NORTH WEST

The philosophy is to maintain a rich environmental reserve of natural and heritage features with appropriate development carefully integrated into the setting. Urban regeneration and improvement of the main towns with the focus on the Garden City (Greenville), sports, agriculture, crafts and adventure sports.

TDA 2: The North West - Foothills and Arts Country – where adventure and sophistication meet



The following projects are identified for the North West:

- ❖ Greenville Urban Regeneration Program – focus on ‘Garden City’ and ‘gateways’ to mountains
- ❖ Anderson Town Center Improvement Program – focus on sports and events
- ❖ Pendleton Town Square Improvement Program and Agricultural Trail
- ❖ Sumter Forest Adventure/Extreme Sports Center
- ❖ Lake Jocassee/Keowee Resort Development – identification of sites/briefs for hotel/villa development, bird hides
- ❖ National Park Improvement Program – site planning and repositioning of accommodation

A Mountain and Nature flagship projects is proposed for the North West:

Mountain and Nature

Organize and package Soft Adventure, Walking, Cycling, Fauna, Flora in the area and promote Greenville for shopping, crafts, local produce arts, culture.

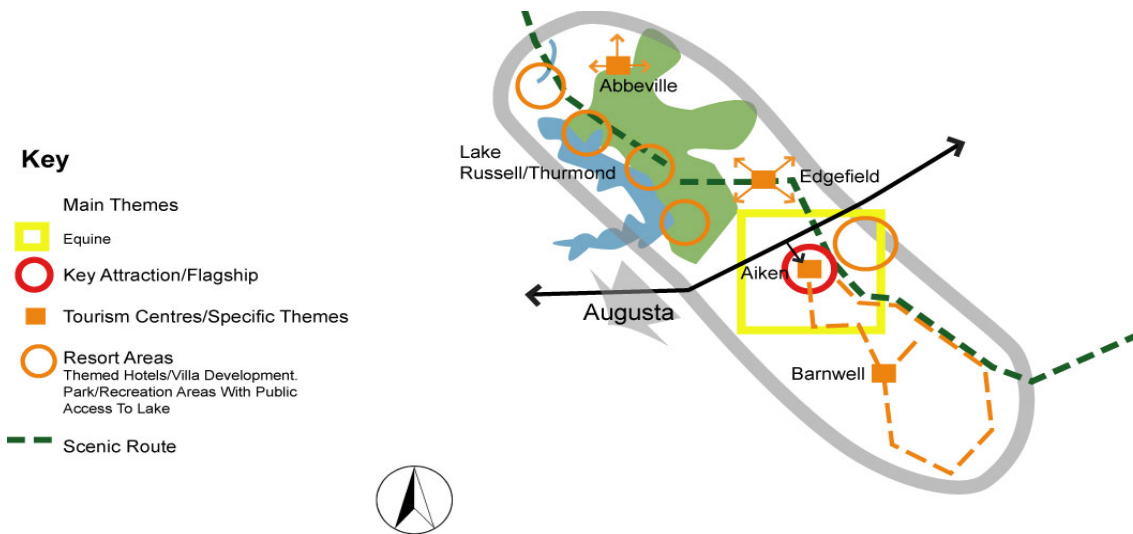
Greenville to be designated the flagship city for the North West. It could be the location for an interpretative center for the area, highlighting what the area has to offer particularly crafts, local produce, arts and culture, acting as a hub with spokes to Anderson, Pendleton, Sumter National Forest, Lake Jocassee, Keowee, with Greenville itself developing walking streets and park extensions.

Indicative Costs \$1m.

iii. MID WEST

Again the philosophy is to maintain the rich environmental reserve of natural and heritage features. This is horse country and the aim is to make it a national equine center for racing, hunting, equine academies supported by rural towns and lakeside development.

TDA 3: The Mid West - Horse and Forest Country – Explore the outdoors



The following projects are proposed for the Mid West:

- ❖ Abbeville Town Square Improvement Program and Heritage Trail
- ❖ Lake Russell/Thurmond Development Strategy - identification of sites/briefs for hotel/villa development
- ❖ Edgefield Town Square Improvement Program and Cotton Trail
- ❖ Aiken Alley Improvement Program and Heritage Trail
- ❖ Aiken Resort Development - identification of sites/briefs for flagship ranches
- ❖ Barnwell Town Square Improvement Program and Agricultural Trail

Two Priority Flagship Projects are proposed for the Mid West:

National Equestrian Area

A new equine corridor should be created with a primary focal point at Aiken. The race course should be developed so that it hosts regular race meetings with a number of major events of national – and international – status. Stud farms and training establishments should be encouraged to be open for guided visits. A Horse Activity Center should be established to include tuitions and residential equestrian experiences. The full package of equestrian-related events should be developed into a calendar of events, packaged and promoted in Aiken, with I-20 nearby links to Camden, should be the center.

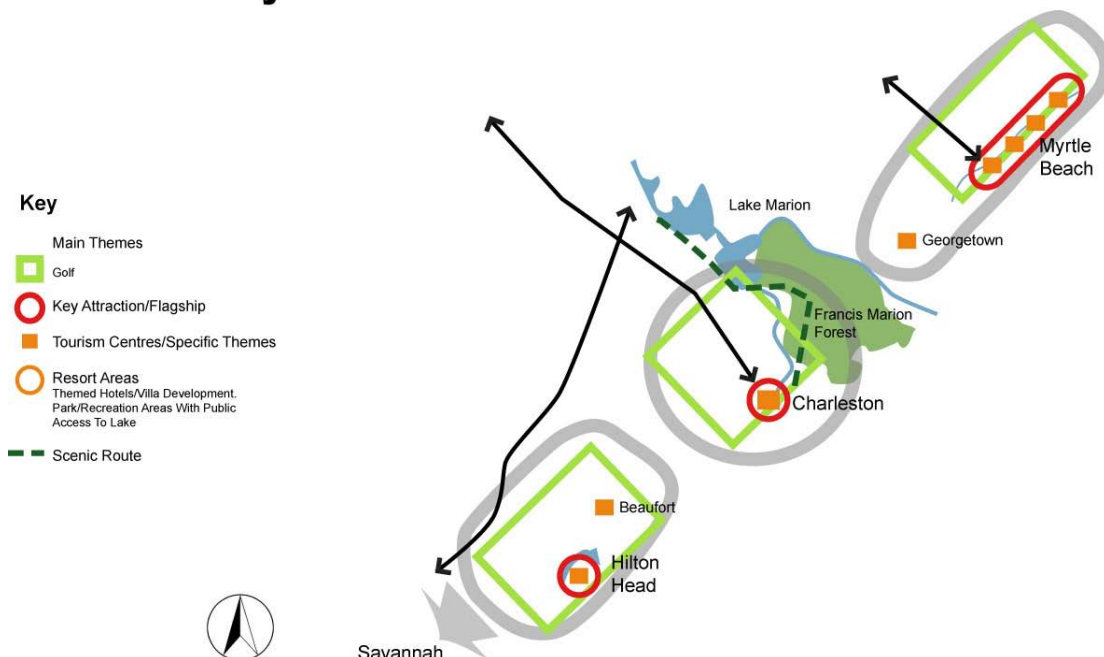
Indicative Cost \$40m.

Heritage Corridor/Towns

The approach should change from heritage sites to heritage towns, and to increase, develop and link key heritage towns with interlinked interpretation. The existing towns of Blackville and Edgefield should be complemented by new heritage-related developments in towns (some already proposed) at Pendleton, Abbeville, Aiken, Santee and Summerville.

Indicative Cost \$3m.

TDAs 4, 5, 6: Hilton Head/ Charleston/Myrtle Beach



The maps for the three coastal Tourism Development Areas are linked together as they share the necklace of coastal marinas and many other features.

2.3.4 HILTON HEAD – TREASURED COAST – INTERNATIONAL – STANDARD REFINEMENT AND EXCLUSIVITY

Along the coast are three key TDAs, (which could be taken as a single coastal destination area) – Hilton Head, Charleston and Myrtle Beach.

Hilton Head offers marine/beach recreation and golf, plus heritage (Bluffton) and new recreation development with high conservation values.

The following projects are proposed for Hilton Head:

- ❖ Access road improvements
- ❖ Bluffton Town Urban Regeneration Program
- ❖ Palmetto Bluff Resort Development
- ❖ Develop Hilton Head as part of Necklace of Coastal Marinas
- ❖ Develop Ecotourism (including sea safaris and mammal watching)

Necklace of Marinas

South Carolina is about half way between New York and Miami. Its popularity as a stopover for yachts en-route between the two areas is slowly growing. Some longer term berthing of yachts in South Carolina is also growing. Independent marinas exist or are being developed or expanded along the coast at Grand Dunes, Charleston, Hilton Head, Palmetto Bluff. These should be further developed and marketed as a Necklace of Marinas to position South Carolina as the yachting center on the East Coast. This will enhance the positioning of the state and grow another tourism revenue source. (e.g. Monte Carlo)

Indicative Top up Costs \$3m.

2.3.5 CHARLESTON – HISTORY AND SOUTHERN EXPERIENCE CENTER – ALL THE BEST OF SOUTH CAROLINA

Charleston is the jewel in the South Carolina crown with its rich heritage. Charleston's conservation, presentation and tourist flow management make it one of the most attractive and best known destination areas within the state and the United States. Indeed it could be regarded as the 'hook' for South Carolina for international visitors. Charleston is unique in having its own successful visitor management plan: this could serve as a model for other towns in the state.

The following projects are proposed for Charleston:

- ❖ Charleston Urban Regeneration Program – focus on ‘gateways’ to town
- ❖ Charleston Town Shopping/Heritage Trail (Preserve small shops in town center. Rising rents are forcing them out)
- ❖ Tourism Park and Ride Program
- ❖ Bird Watching Strategy/Interpretation Center (Francis Marion Forest and Coast)
- ❖ Develop Charleston as part of Necklace of Coastal Marinas

The development of the Gullah heritage is proposed as the Priority Flagship Project for the Charleston area.

Gullah Country

The Gullah story requires stronger presentation. Towards this end, better packaging and three interpretative centers are proposed which will gather together the Gullah story and present it in a more understanding and interactive manner. The locations proposed are Penn Center, Charles Towne Landing and Beaufort as the hub center for the Gullah.

Indicative Cost \$5m.

2.3.6 MYRTLE BEACH – VACATION AND CONVENTION CAPITAL OF SOUTH CAROLINA – DESTINATION FOR ALL TASTES

Myrtle Beach is the most popular resort area in South Carolina. Much of its tourist plant is outmoded and “tired”. It needs to be repositioned so as to attract higher spending visitors and alleviate its high seasonality factor.

Re-development of the beach front area, upgrading the accommodation bank together with the major new developments in progress or planned – i.e. sports training academy, Hard Rock theme park, major convention center - supported by the enhancement of the inland towns will better position it to have a more positive future with medium term development as a convention center.

The following projects are proposed for Myrtle Beach

- ❖ Myrtle Beach Urban Regeneration Program – focus on ‘gateways’ to town and in the future, develop as convention and sports center supported by improved airport and air access
- ❖ Atlantic Beach Resort Center – public realm improvements/facilities
- ❖ Little River Resort Center – public realm improvements/facilities
- ❖ Myrtle Beach Resort Center – public realm improvements/facilities
- ❖ Beach Protection, Re-nourishment program
- ❖ Surfside Beach Resort Center – public realm improvements/facilities
- ❖ North Myrtle Beach Resort Area – hotel/villa development

- ❖ Develop Myrtle Beach as part of Necklace of Coastal Marinas
- ❖ Golf Development Strategy – future demand/type/quality etc
- ❖ State Park Improvement Program – site planning and repositioning of accommodation including Hunting Beach State Park
- ❖ Georgetown Town Center Improvement Program and Heritage Trail

The following is proposed as the Priority flagship Project for Myrtle Beach:

Myrtle Beach Repositioning

Myrtle Beach suffers from a high level of seasonality. To generate shoulder and low season business Myrtle Beach has to be re-positioned. Towards this end a number of developments are underway or planned, such as the Cal Ripkin Sports Center (construction started), Hard Rock Theme Park (underway), closing down the Pavilion amusements, further expansion of “Broadway on the Beach”, This should help generate the rehabilitation of the Boulevard and beach front area giving greater access to the beach.

The above developments lead the way for Myrtle Beach to become a National Convention and Sports Academy destination. This requires:

- ❖ additional four and five star hotels,
- ❖ major investment to develop an international-style and –standard Convention Center,
- ❖ improved airport capacity and road access.

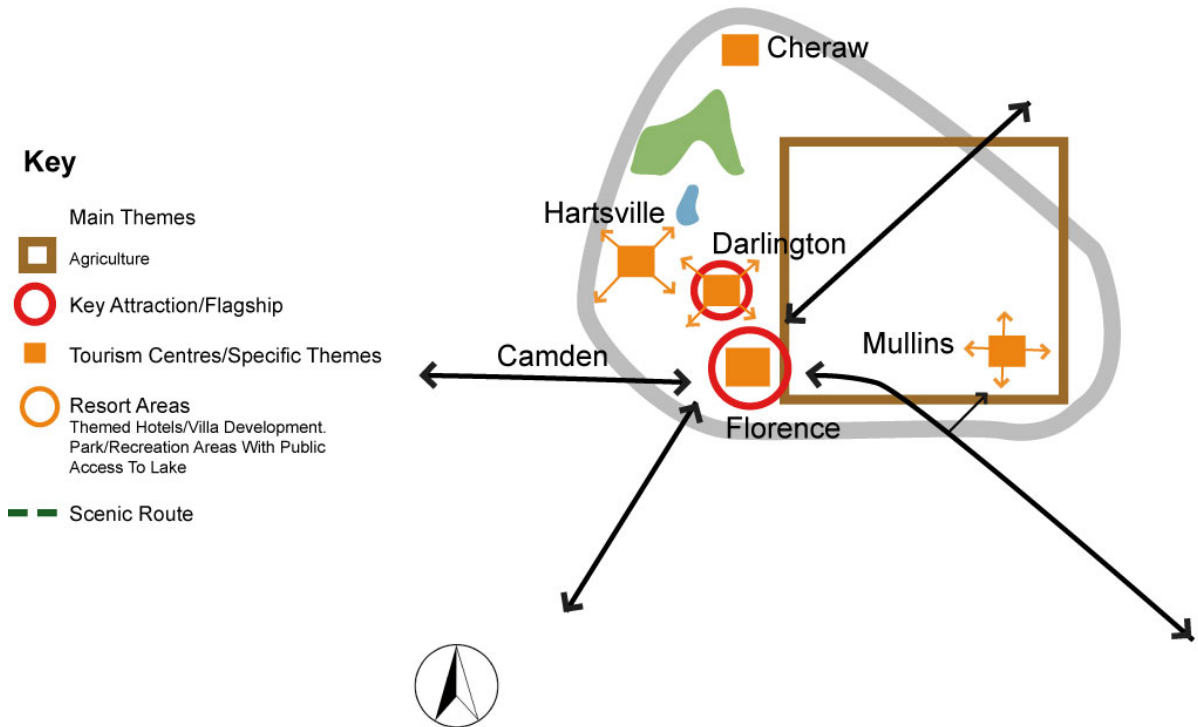
In respect of access, the construction of I-73 to Myrtle Beach must be seen as a priority though it will take some years to come to fruition. The early completion of the research work of the North Eastern Strategic Alliance (NESA) on the new regional airport and a plan of implementation are also essential.

Indicative Cost \$225m.

2.3.7 THE EAST

The East is essentially comprised of “quiet areas” showcasing country and country town life. Living, experiencing earlier rural farming and lifestyle for the enjoyment of both in state, out of state and international visitors with a continuation of the revolutionary war experience from the Rock Hill area and majoring on the “Swamp Fox” - Francis Marion.

TDA 7: The East - Swamp Fox Country – Francis Marion Land



The following projects are proposed for The East

- ❖ Florence Town Center Improvement Program – focus on sports and events
- ❖ Cheraw Town Square Improvement Program and Heritage Trail
- ❖ Hartsville Town Park Improvement Program and Cotton Trail
- ❖ Darlington Town Center Urban Regeneration Program and Agricultural Trail
- ❖ Science Center – children’s themed science park
- ❖ Mullins Town Center Improvement Program and Agricultural Trail

Two Priority Flagship Projects are proposed for The East:

Francis Marion Trail

The state legislature has already passed a resolution to create the Francis Marion Heritage and Tourism Trail honoring Francis Marion’s revolutionary campaigns. The research and archaeological work to develop the Francis Marion trail should progress. The defined sites should be developed and made accessible to visitors.

To further and present the story, a central Francis Marion Interpretative Center is proposed, to be based at the Francis Marion University near I-95 and supported by four clusters of

Francis Marion sites interpreted at subsidiary Interpretive Centers at locations selected for access and their relationships to the site clusters.

Indicative Cost \$5m.

Country Life, Food and Rural Town Circuits

The rural and rural town lifestyle of earlier times is of interest to today's visitors. Presenting it in a meaningful and attractive manner is the challenge. The country towns' architecture and street furniture of former times should be preserved, revived, rehabilitated and/or recreated.

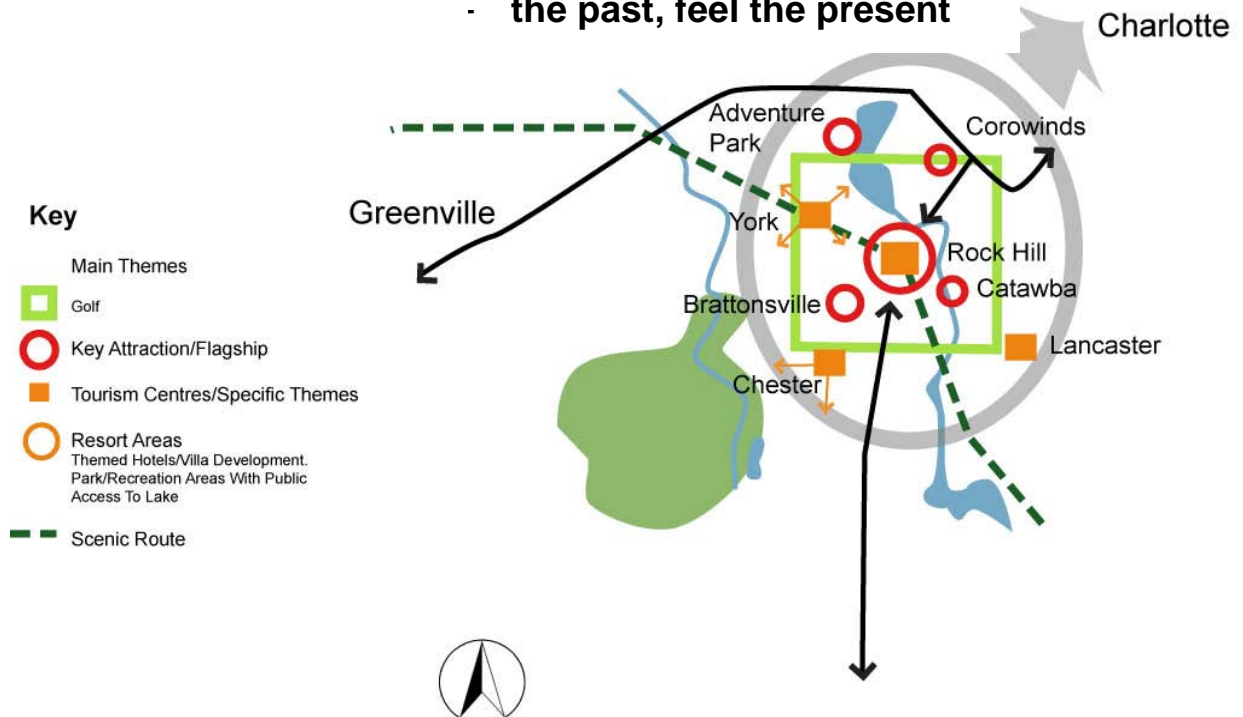
A series of Outdoor/Indoor Country Life presentations are proposed to give an interactive experience of former days farming and country living. These could include live period farms and farmyards with the relevant machinery, equipment, buildings and methods in operation. Some could include overnight accommodation again furnished, fitted and operated to reflect the former ambiance, food etc.

Indicative Cost \$3m.

2.3.8 THE NORTH

The North should have Rock Hill as a center for a major interpretation center and trail related to the wars fought in the state. This should be complemented by heritage, cultural and arts trails with attractive town centers.

TDA 8: The North - Center for all times – Taste - the past, feel the present



The following projects are proposed for The North:

- ❖ Rock Hill Town Center Improvement Program
- ❖ York Town Center Improvement Program and Heritage Trail
- ❖ Chester Town Center Improvement Program and Heritage Trail
- ❖ Lancaster Town Center Improvement Program and Arts Trail
- ❖ Historic Brattonsville Improvement Program (linkage with York Heritage Trail)
- ❖ Catawba Cultural Center Improvement Program and Cultural Trail
- ❖ State Park Improvement Program – site planning and repositioning of accommodation

The following Priority Flagship Project is proposed for The North:

Revolutionary War (Battlefields)

A major Interpretative Center is proposed in the Rock Hill Area with subsidiaries at important battle sites in the region and linking to the Francis Marion centers. These should comprise vivid presentations using audio visual and other techniques to recreate and present the battle tactics as well as the events linking them together and to other battles and campaigns in the Revolutionary and Civil Wars around the country. The aim would be to establish these as the places where people get an understanding of the wars fought in the state. Indicative Cost \$3.5m.

2.4 CONCLUSIONS AND RECOMMENDATIONS

- ❖ The overall objective of the Action Plans is to attract higher spend tourists, improve the yield and achieve a better spatial spread through enhanced existing products and new products.
- ❖ Forty-nine pilot demonstration projects have been identified to kick-start the product development action plan. These cover various types of development:
 - Parks, Lakes and Beach Improvements
 - Historic and Culture Sites
 - Arts and Crafts
 - Discovery Routes and Heritage Trails
 - Waterfront and Resort development
- ❖ Eleven Priority Flagship Projects are proposed to give a focus to the TDAs these will be dependent on state funding and incentives to influence private sector investment.
- ❖ The state parks are such a valuable asset that it is proposed that ten be selected for development as a special Flagship Project
- ❖ Eight Tourism Development Areas(TDAs) are proposed to produce themed tourism clusters and circuits.
- ❖ The development of the TDAs will require the existing RTOs and CVBs to work across their regional boundaries in cooperation with regional colleagues to drive the development and marketing.

APPENDIX 2 – COMPARITIVE PROFILES OF US AND INTERNATIONAL DESTINATIONS

(Extracts from Volume two of the Action Plan)

Table - Case Study Comparative Profile-United States Destinations

	West Virginia Tourism	Virginia Tourism	Visit Florida	Illinois Bureau of Tourism	North Carolina
	www.wvtourism.com	www.virginia.org	www.visitflorida.com	www.enjoyillinois.com	www.visitnc.com
Population (Million)	1.8	7.6	17.8	18.8	8.7
GDP per Capita (US\$)	25,219	44,021	34,127	41,056	39,389
Visitor Numbers (person trips)* (Million)	16	44	85	50	49
Visitor Expenditure (person trips)* (Billions US\$)	1.8	14.3	56.3	23.0	13.0
Structure	Tourism Division of Dept. of Commerce	Government Authority	Public/Private Company (501C6)	Division of Department of Commerce and Economic opportunity	Tourism Division of Dept. of Commerce
Annual Marketing Budget (including staff cost) (Million US\$)	18	18	89 (25 State 64 Private Sector)	50	11
Staff Levels	72	65	118 (65 HQ 40 TIOs) 13 o/s	12	80
Annual Marketing Spend (Million US\$)	15	13	82	20 (+ 25 in funding 40 CVBS)	6
Product Development Planning Department	Yes	Yes	Yes	NO	NO
Annual Product Development Grant Fund (Million US\$)	Yes 10	No	No	NO	No

*Source: T.I.A. (all the other information based on consultations with respective Tourism Organizations)
Visitor expenditures in this table and following commentary relate to 2003

Table - Comparative Profile - International destinations

	Ireland	Scotland	New Zealand	Norway
	www.tourismireland.com	www.visitscotland.com	www.newzealand.com	www.visitnorway.com
Population (Million)	4.1	5	4.1	4.6
GDP per Capita (US\$)	34,100	30,900	24,100	42,400
Visitor Numbers (out of state) (Million)	7.0	10.7	24	3
Tourism Revenue (Billions) US\$	5.2	6.2	4.2	6.2
Structure	FAILTE IRELAND -National Tourism Development Authority TOURISM IRELAND -Overseas Marketing	Visit Scotland – National Tourism Authority	Tourism New Zealand – upper care-National Tourism Authority	Innovation Norway - Tourism is one division within this government agency
Annual Marketing Budget (including staff cost) (million US\$)	81.9	85	52	20
Staff Levels	FAILTE IRELAND -HQ 230 -RTA/TIO 110 TOURISM IRELAND -HQ 50 -Overseas 100	-HQ 220 -TIO 800	100 Overseas Staff.	- HQ 20 - overseas 35
Annual Marketing Spend (Million US\$)	51.2	77.2	39	12.6
Product Development Planning Department	Yes	Yes	Yes	Yes
Annual Product Development Grant Fund (Million US\$)	13	Yes	Yes	Yes



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