

A Development and Economic Impact Study of the South Carolina National Heritage Corridor: A Roadmap for Economic Development

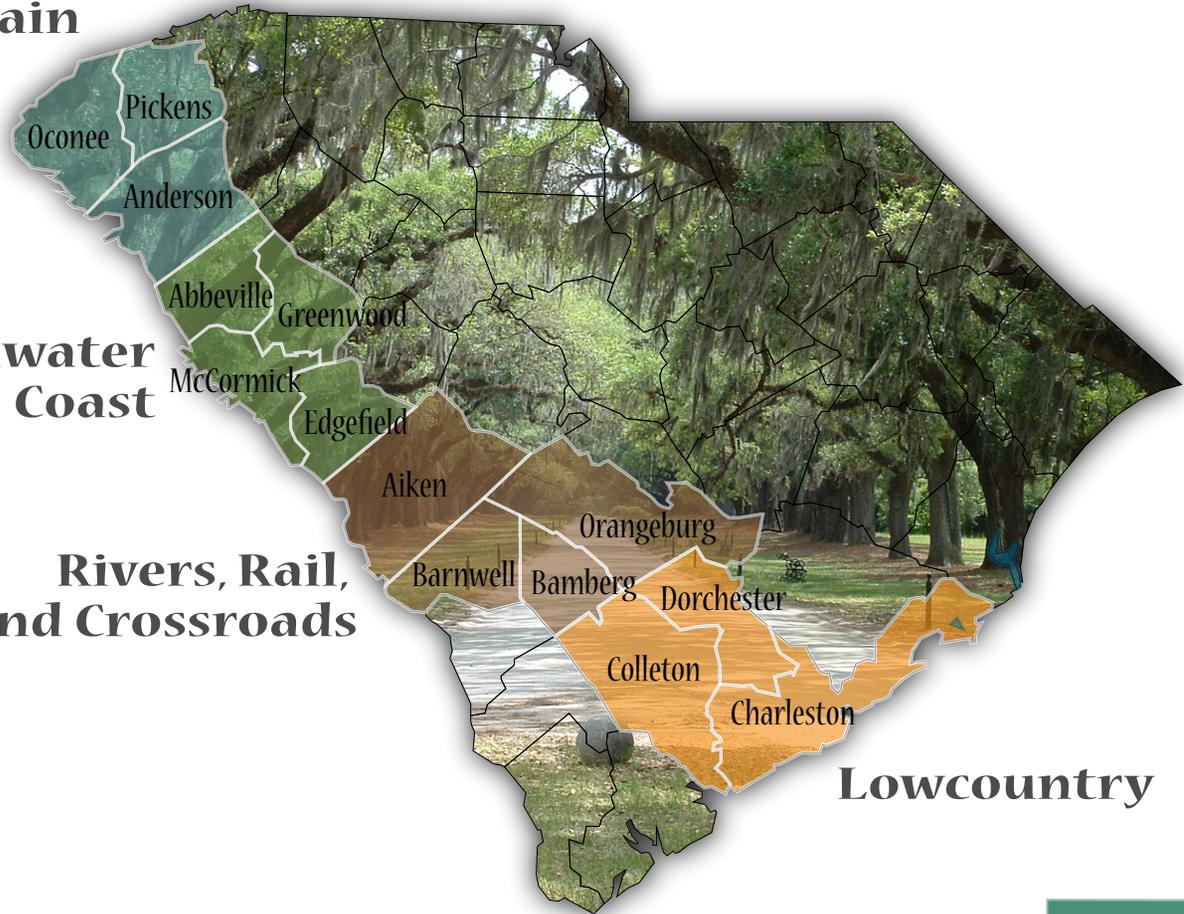


Mountain Lakes

Freshwater Coast

Rivers, Rail, and Crossroads

Lowcountry



**University of South Carolina-Clemson University
Tourism Research Partnership**

**Alfred P. Sloan Foundation
Travel & Tourism Industry Center**





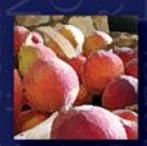
**A DEVELOPMENT AND ECONOMIC IMPACT
STUDY OF THE SOUTH CAROLINA
NATIONAL HERITAGE CORRIDOR:
*A ROADMAP FOR ECONOMIC
DEVELOPMENT***

University of South Carolina-Clemson University

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A DEVELOPMENT AND ECONOMIC IMPACT STUDY OF THE SOUTH CAROLINA NATIONAL HERITAGE CORRIDOR: *A ROADMAP FOR ECONOMIC DEVELOPMENT*

Tourism is often used as a metaphor for life—journeys that can be personal, collective, enjoyable, and even spiritual. Some journeys have no destination, but are undertaken for sheer wanderlust. However, most of our journeys, as groups or individuals, call for a map—a useful guide helping us navigate our routes, support our travels, and possibly reach our destinations, as well as assisting in meeting our expectations or goals for the journey.

This document—*A Development and Economic Impact Study of the South Carolina National Heritage Corridor*—is a kind of map. It is a strategic roadmap guiding our state’s economic journey by providing credible and reliable data upon which future planning and policy decisions can be made. Readers will find here economic impact scenarios, travelers’ needs and preferences, and recommendations for tourism product development.

This roadmap appears at a time when our state is at a crossroads—moving toward a knowledge-based economy featuring technology, health care, energy, and real estate. As an industry in which the state has long excelled, tourism becomes a vehicle for this transition toward a new model for economic development, using the arts, culture, events, and entertainment to attract creative and entrepreneurial individuals and companies from all over the world.

This new model is attainable with the Corridor leading the way. Like many National Heritage Areas (NHAs) (see Appendix A),

the return on investment for the South Carolina National Heritage Corridor (SCNHC) is impressive.

- Visitors to the 14-county region annually generate \$624 million in direct economic impact.
- In addition, 9,389,120 tourists visited these counties in 2009. These visitors spent an average of \$45.83 per day and stayed in the corridor an average of 1.45 days.
- The Corridor’s economic impact is even more remarkable: \$1.0 billion in total output impact; \$375 million earnings impact; \$91.4 million indirect tax impact; and 17,867 jobs.

These figures are a testament to the power of partnership—working across geographical, social, and political boundaries. For example, this document represents a historic partnership between the South Carolina National Heritage Corridor, the University of South Carolina, and Clemson University. They may be fierce foes on the football field, but these universities are proving that they can be partners in the boardroom as they work together to promote economic development in South Carolina.

The SCNHC has taken a leading role in positioning tourism as a catalyst for economic development by investing in sound, measurable research by which it can be held fiscally accountable by residents and community leaders. In this way, the Heritage Corridor provides leadership and vision for balanced economic growth across South Carolina and beyond.

For a similar study for your community, state, region, national park, or heritage area, please contact:

Dr. Rich Harrill, Director

Alfred P. Sloan Foundation Travel & Tourism Industry Center
College of Hospitality, Retail, & Sport Management

South Carolina National Heritage Corridor



University of South Carolina

(803) 777-7682

rharrill@hrsm.sc.edu

About the Alfred P. Sloan Travel & Tourism Industry Center

The Alfred P. Sloan Industry Studies Program was established to enhance U.S. industrial competitiveness through university research in close partnership with industry. The first Sloan Industry Center, the International Motor Vehicle Program at MIT, was established in 1990, and the Sloan Foundation's program eventually grew to include a total of 26 Centers at 19 universities across the United States. Each center consists of multidisciplinary groups of students and faculty with versatile backgrounds including economics and other business and technical disciplines.

In 2003, funding through the Industry Centers Program made possible an industry center focusing on travel and tourism at the University of South Carolina.

The Alfred P. Sloan Foundation Travel & Tourism Industry Center is quickly becoming recognized as a leader in the travel and tourism industry, providing useful, practical, and unbiased analyses and cross-industry linkages. Sloan Travel & Tourism Center clients have included the U.S. Department of Commerce, Office of Travel & Tourism Industries (OTTI), the United State Travel Association (USTA), National Tour Association (NTA), as well as numerous convention and visitors bureaus (CVBs) and destination marketing organizations (DMOs).

Dr. Rich Harrill, a native of Gaffney, South Carolina, has directed the Sloan Travel & Tourism Industry Center since 2005.



PROJECT TEAM

Dr. Rich Harrill	Project Director Director, Alfred P. Sloan Foundation Travel & Tourism Foundation Industry Center, University of South Carolina
Dr. Chi-ok Oh	Project Co-Director, Assistant Professor, Michigan State University
Dr. Matt Brown	Associate Professor, Department of Sport and Entertainment Management, University of South Carolina
Dr. Jason Draper	Assistant Professor, University of Houston
Dr. Peter W. Cardon	International Tourism Research Institute, University of South Carolina
Dr. Mark S. Nagel	Associate Professor, University of South Carolina
Dr. Xiang (Robert) Li	Associate Director, Alfred P. Sloan Foundation Travel & Tourism Industry Center
Dr. William Norman	Associate Professor, Clemson University
Ms. Danielle Earle	Research Consultant, University of South Carolina

SOUTH CAROLINA NATIONAL HERITAGE CORRIDOR STAFF

Michelle McCollum	President and CEO
Scott Enter	Director of Interpretation and Training
Elizabeth Harm	Director of Development
Devon Harris	Director of Public and Visitor Relations
Whitney Ellis	Group Tour Manager
Anna Friar Joyner	Graphics Design Manager
Grace Jameson	Tourism Supervisor Region 3 Discovery Center
Tara Roberts	Tourism Coordinator
Terri Doniphan	Tourism Coordinator

South Carolina National Heritage Corridor



CONTRIBUTORS

Bob Alexander	SCNHC Board—Secretary
Ray Anderson	SCNHC Board—City of North Charleston
Michael Allen	National Park Service Gullah / Geechee Cultural Heritage Corridor Coordinator
Randy Akers	The Humanities Council of South Carolina
Glenn Brill	Anderson Convention & Visitors Bureau
Tom Brooks	Planning Director, Saluda County
Bess Ciupak	Blue Ridge Arts Center
Andy Callaham	Callaham Orchard
Lynn Cox	Barnwell County Tourism and Community Development
Carla Cloud	Aiken Downtown Development Association
Bob Daffin	Keowee Town Management
Ken Durham	Mayor of Edgefield
George Estes	Director of Operations, South Carolina Parks, Recreation, and Tourism
Rhoda Green	Region 4 Board
Harriet Householder	Saluda County Chamber of Commerce
Sara Juengst	Willington On the Way
Donna Livingston	SCNHC Board—Director, Edgefield County Chamber of Commerce
Dana Paterra	Caw Caw Interpretative Center
Kelly McWhorter	Director, Greenwood Regional Convention & Visitors Bureau
Pamela Moore	Art Azure Studio
Georgia McDaniel	Ashley River Historic District at Drayton Hall
Glenn Parker	City of Aiken, Department of Parks and Recreation
Myrtle Quattlebaum	Region 3 Board

South Carolina National Heritage Corridor



Bettis Rainsford

Anne Rice

Anne Sheriff

Ken Sloan

Phil Shirley

John D. Singh

Cheri Standridge

Buster Smith

Charlie Sweat

Charlie Thornton

Lynn Thompson

Neal Workman

Kathryn Zahn

SCNHC Board—Chair

USC Salkehatchie Leadership Institute

Central History Museum

Oconee County Convention & Visitors Bureau

Oconee Parks, Recreation and Tourism

SCNHC Board—Assistant City Administrator, City of Orangeburg

Abbeville County Chamber of Commerce

Edisto Memorial Gardens

SCNHC Board Chair

SCNHC Board—Treasurer

Living History Park

SCNHC Board—Past Chair

Emerald Farm



SPECIAL THANKS

- Alliance of National Heritage Areas
- Alfred P. Sloan Foundation
- South Carolina Department of Archives and History
- South Carolina Department of Parks, Recreation, & Tourism
- South Carolina USDA Rural Development
- United States Travel Association
- U.S. Department of Commerce, Office of Travel & Tourism Industries
- U.S. National Park Service
- USC Salkehatchie Leadership Institute
- Western Carolina Commission on Higher Education

SPECIAL THANKS

- Dr. Michael Amiridis, Vice President of Academic Affairs and Provost, University of South Carolina
- Dr. Brian Mihalik, Dean, College of Hospitality, Retail, & Sport Management, University of South Carolina
- Dr. Larry Allen, Dean, College of Health, Education, and Human Development, Clemson University
- Dr. Brett Wright, Department Chair, Parks, Recreation, & Tourism Management, Clemson University
- Rick Duke, Director, Trent Lott National Center for Excellence in Economic Development and Entrepreneurship, University of Southern Mississippi
- George Estes, Director of Operations, Heritage Tourism, South Carolina Department of Parks, Recreation, & Tourism
- Dudley Jackson, Research Director, South Carolina Department of Parks Recreation, & Tourism

South Carolina National Heritage Corridor



EXECUTIVE SUMMARY

The South Carolina National Heritage Corridor is a 14-county region that runs from Oconee County in the mountains of South Carolina, down the Savannah River, and across to Charleston County. The Heritage Corridor is divided into four regions. The Mountain Lakes Region (Region 1) consists of Oconee, Pickens, and Anderson counties. The Freshwater Coast Region (Region 2) contains Abbeville, Greenwood, McCormick, and Edgefield counties, while the Rivers, Rail, and Crossroads Region (Region 3) includes Aiken, Barnwell, Bamberg, and Orangeburg counties. The Lowcountry Region (Region 4) comprises Charleston, Colleton, and Dorchester counties. The United States Census Bureau estimated that the 2009 population of these counties was 1.3 million people. This region’s diverse resources are available to the tourism industry, such as cultural and historical sites, natural resources, special events, unique Southern culinary opportunities, and various forms of recreation.

Since the inception of this study, Congress has added three additional counties to the South Carolina National Heritage Corridor that are not included in this study.

PURPOSE

The purpose of this study is to provide credible and reliable data to guide planning, policy, and management in the Heritage Corridor (HC) through comprehensive examination of stakeholder opinions, economic impact scenarios, travelers’ needs and preferences, and tourism product development.

OVERALL FINDINGS

- The return on investment for the South Carolina National Heritage Corridor (HC) is impressive. Visitors to the 14-county region annually generate \$624 million in direct

economic impact. In addition, 9,389,120 tourists visited these counties in 2009. These visitors spent an average of \$45.83 per day and stayed in the corridor an average of 1.45 days. The Corridor’s economic impact is even more remarkable: \$1.0 billion in total output impact; \$375 million earnings impact; \$91.4 million indirect tax impact; and 17,867 jobs.

- An average visitor to the HC is willing to pay a sizable amount (\$11.7) per day within a range of \$0 to \$15 to experience the Corridor. Multiplied by the net willingness to pay of \$11.7, total annual visitors of 9,389,120 would produce \$109,852,704 in additional economic benefit.
- Some tourism market segments have substantial economic impact on the HC, including outdoor recreation, heritage tourism, special-event tourism, nature-based tourism, and culinary tourism. Outdoor recreation had the greatest number of visitors (751,000) and the highest total economic output (\$47.1 million). Heritage tourism had the second lowest number of tourists among these market segments (235,000), but the second highest total economic output (\$35.9 million). Heritage tourists spend \$114 per day while in the corridor, almost three times what was spent by outdoor recreation visitors. These numbers suggest that outdoor recreation and heritage tourism in the Heritage Corridor are distinct, yet complementary markets.
- Respondents were slightly more than satisfied (4.06/5) when asked to indicate their overall satisfaction with their most recent trip to the Corridor. Most respondents (85.5%) were very or extremely satisfied with their most recent visit.
- Overall, 90% of survey respondents were very or extremely satisfied with the knowledge of the Discovery Center(s) staff (4.39/5).

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- On average, respondents were at least very satisfied (4.00/5) with all six items related to satisfaction with the Discovery Centers, including staff knowledge, guided tours, exhibits, information, gift items, and variety of local artisans work.
- Of the 169 respondents who indicated at least one way the Discovery Center influenced their visit to the Heritage Corridor, 43.2% said they found a new site to visit on the Corridor.
- In addition, 39.1% indicated the Discovery Center(s) influenced them to plan another trip to the HC, and 39.7% decided to take a guided tour of the Discovery Center(s).
- The recent economic recession calls for greater fiscal accountability and restraint with taxpayer dollars. For example, this study found that visitation to the Freshwater Coast Discovery Center in Edgefield (29.2%) was significantly higher than visitation to the Rivers, Rails, and Crossroads Discovery Center at Blackville (19.5%). Although very important to the local community and the Corridor in general, the Blackville Discovery Center might be more effectively operated by a local partnership.
- Given its substantial economic impacts, the HC has the opportunity to benefit the entire state through statewide heritage area designation. For example, the Edgefield Discovery Center could be home to the South Carolina Rural Economic Development Center (SCREDC), similar to the Georgia Rural Economic Development Center (www.gredc.org) and focus on tourism-led economic development in rural areas—particularly retail, food and beverage, and lodging development in rural downtowns.
- The economic impact of the HC can be enhanced to better serve the state’s residents and communities. Secure

operational funding from the state will allow the leveraging of federal and private monies directly into communities in the form of real dollars. This model is consistent with the funding that the Corridor has already provided to communities since its inception (see Appendix B for a complete list of grants to communities).

- The economic impact of the HC demonstrates its value in partnering with Economic Development Corporations throughout the state to provide technical assistance on quality of life initiatives and business recruitment.

RECOMMENDATIONS

Strengths

- The HC has a strong organizational and operational model.
- It enjoys broad support from residents and public officials.
- The Corridor provides a family experience and is frequently enjoyed by groups, families, and friends. It is frequently described as “wholesome.”
- The Corridor’s staff has been described by stakeholders as professional, responsive, and dedicated.
- The Corridor receives limited federal government funding, but it must be maintained for the HC to continue to create economic development for South Carolina.
- Of those individuals who have visited the HC, they were highly satisfied with their overall experience (85.8%).
- The Corridor effectively delivers sponsored grants, workshops, and training for residents and community leaders.
- The HC has demonstrated innovation, such as the “Carolina-Barbados Connection”—a traveling art and history exhibit

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jointly sponsored by the HC and the Barbados Ministry of Tourism. This program was the first time a NHA pushed beyond its boundaries to partner with another country. International tourism will be increasingly important to NHAs as the Federal government explores more effective methods of attracting international tourists.

- As a regional entity, the HC can provide benefit to many counties and communities.
- The Corridor has ample assets and attractions enabling it to execute its main mission—promoting history and heritage in South Carolina.
- The HC can access the support of numerous tourism and heritage experts locally, nationally, and internationally.
- Stakeholders believe that the Corridor provides effective marketing materials.
- Survey respondents were extremely satisfied with the information provided on the Corridor website (4.16/5) and ease of navigation (4.11/5).
- Tours and visits to the HC are perceived by tourists as a good financial value.

Weaknesses

- To execute its mission adequately, the HC requires statewide support from public, private, and nonprofit organizations, in addition to federal support.
- Some stakeholders mentioned that grant paperwork should be streamlined as much as possible within state and federal guidelines.
- To carry out its mission effectively, the Corridor requires a relatively high degree of autonomy and self-determination.

- The Corridor needs better support from state coordinating agencies to implement new initiatives in the region, such as signage and interpretation.
- Signs in the Corridor need a more attractive and informative design, especially with regard to entrances and exits.
- The Corridor—like many tourism organizations and agencies—needs an ongoing research program, especially related to market segmentation, targeting, and advertising.
- The HC needs a strong, overarching brand that tells a cohesive story, yet is flexible enough to accommodate local brands. This “brand narrative” must be compelling enough to attract tourists, but at the same time accommodate local sites and stories.
- The Corridor’s four regions need better integration, especially with regard to the Lowcountry region, which already has a strong tourism industry featuring coastal attractions.
- The Corridor needs proper state and local infrastructure investments for visitors to access its assets and attractions.
- The Corridor’s marketing efforts should have a stronger sales component—however, this challenge will remain dependent on infrastructure and tourism product development.
- The Corridor should have coordinated communications with constituents, clients, and customers.
- The Corridor needs better cross-promotion with the regional hotels, welcome centers, and convention and visitors bureaus (CVBs).
- It must develop internal marketing with partner agencies.

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Opportunities

- The Corridor has the geographical scope and grassroots networks to expand tourism interpretation across the state using new technologies such as GPS and hand-held applications.
- The HC has an opportunity to advance integrated social media for heritage areas through adoption of virtual communities, travel reviews, blogs, social networking, and media sharing.
- The Corridor’s flexible organizational model enables it to address several economic concerns while remaining true to its core mission.
- It has the organizational capacity to introduce new products.
- No shopping, no tourists: the HC must provide more opportunities for shopping. A majority of survey respondents thought that the opportunity to buy Corridor-related products was important to their experience.
- Survey respondents preferred to have more opportunity to experience local communities and cultures, meaning the Corridor’s cities, towns, and communities.
- Survey respondents indicated that education and interpretation are important to the Corridor experience.
- Given their high direct economic impact, more outdoor recreation opportunities should be featured in Corridor marketing and development.
- Special-events and festivals are cost-effective alternatives to costly tourism facilities.

- Although tangential to the core mission of heritage and history, the Corridor has numerous nature-based assets and attractions that should receive more attention, including waterways and parks.
- Culinary or “foodie” tourism should become a featured part of the HC experience, encompassing diverse facets of heritage and culture.
- The Corridor should focus on attracting group tours and buses.
- It should develop stronger ties with the local real estate industry.
- It should explore the impact of in-migration patterns to South Carolina on the region.
- The Corridor should utilize its location along I-85 to increase both day trips and overnight visits.
- The Corridor will experience the greatest improvement to economic impact with the extension of visitor stays.

Threats

- Potential financial cutbacks from the federal government could dramatically hurt the Corridor unless other funding sources are identified and cultivated.
- Without adequate funding, many historic and heritage assets and attractions may be lost due to lack of preservation.
- Similarly, without adequate funding, many natural assets and attractions may be lost due to lack of conservation.

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- The Corridor has widespread support, but occasionally encounters political turf wars at the state level that hurt its mission.
- Tourism development in the Corridor is undermined by those who confuse tourism with community pride and boosterism.
- Eyesores, including environmental degradation and dilapidated houses, contribute to visual blight in the HC.

KEY FINDINGS FROM STAKEHOLDER INTERVIEWS

- This study included interviews with key political and community leaders across the South Carolina National Heritage Corridor (HC) area. These interviews were intended to gain additional insight into the extent to which the Corridor has effectively offered services to stakeholders, promoted tourism development in relevant communities, fostered collaboration in heritage tourism efforts, and preserved historical and natural resources in the defined area.
- The 40 respondents interviewed were chosen based on their extensive experience observing the development and management of the Corridor over the past 10 to 15 years. These respondents included local county and city officials with significant tourism duties, heritage site managers, and other related leaders. Interviews typically lasted between one and two hours and were conducted at the offices of respondents. Once the interviews were completed, the analysis involved reviewing the interview transcripts carefully and identifying main themes.

A summary of these themes is provided below, starting with areas in which the Corridor has excelled.

- Respondents were nearly unanimous in voicing the utmost confidence in HC leadership and its delivery of grants, training and workshops, conferences, marketing, and special events.
- Respondents mentioned that the Corridor office acts with class, professionalism, responsiveness, and dedication.
- Respondents viewed the Corridor’s grant program as an excellent source of seed money.
- Respondents described the Corridor not just as an administrator of grants, but as an active partner.
- Respondents considered training and workshops to be extremely helpful and innovative.
- Respondents valued the Corridor’s role in marketing and advertising.
- Respondents mentioned the importance of the Discovery Centers in Edgefield and Blackville.
- Respondents frequently mentioned the HC’s role in reinvigorating rural communities and providing the know-how to identify, develop, and market historical assets.
- The Corridor is also reportedly effective at assisting in local events that promote rural communities, which in turn promote conservation and preservation.
- The Corridor was viewed by respondents as a champion of saving and promoting the arts, creating a culture whereby local artists can flourish.
- Respondents were frequently impressed by the HC’s ability to convene various stakeholders by defining common areas of interest.

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- Respondents consider the Corridor a strong force for preservation of historical and cultural resources.
- Respondents noted that the quantitative economic impact on local communities is unclear, although noting many positive economic benefits for communities. This study is the first comprehensive attempt to quantify the HC’s economic impact.
- According to respondents, the Corridor has evolved into a highly effective model of tourism development for rural communities in South Carolina.
- The HC creates a culture of best practices for rural economic development through tourism, according to respondents.
- Respondents felt that it spurs communities to action to mobilize their heritage assets and enable new ways of thinking about these assets.
- Participants wanted to see a strong and long-lasting Heritage Corridor effort, viewing the HC as instrumental in training and servicing rural communities.

Room for Improvement

- Respondents thought that grant paperwork was excessively cumbersome, although acknowledging restrictions posed by state and federal guidelines.
- Many respondents identified branding as a significant hurdle for the Corridor.
- A few respondents felt the issue with the Corridor brand is that it has too many distinctions and needs a simple, overarching theme. Such a theme is in keeping with the efforts of other national heritage areas that have emphasized an overarching story or narrative about people, heritage, and history.

- A few respondents observed the Corridor brand and the local brands sometimes clashed.
- Some respondents thought there was insufficient signage on freeways and highways to get people off the beaten path and into the heritage areas. The signage should be directional as well as informational. Changes in this area will require considerable coordination and support from the South Carolina Department of Transportation.
- Some respondents felt that the Corridor could improve in the area of target marketing.
- Some respondents thought working under the South Carolina Department of Parks, Recreation, and Tourism inhibits the HC from acting most effectively, but some recognized the value of working under PRT.
- Some respondents thought that the Corridor could do more to coordinate with existing and potential partners. Nearly each respondent who mentioned this, however, also recognized that the Corridor has limited personnel to cover such extensive territory.
- Respondents felt that the primary marketing and branding issue for the HC is visibility.
- Many respondents recommended better cross-promotion with local hotels and websites (including CVBs) and networking more with hotels and welcome-center staff.
- The Corridor needs to keep better lines of communication open—especially as it cuts or reassigns staff.
- It also needs to continue to market internally to various government agencies so they understand the importance of tourism to South Carolina’s economy.

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ECONOMIC IMPACT SCENARIOS

Economic impact estimates were made for the South Carolina National Heritage Corridor (HC) and economic impact scenarios were generated for tourism market segments within the Corridor. Specifically, the overall output of tourism activities as well as the impact on earnings, indirect business taxes, and employment was measured across the entire HC, within the four regions of the Corridor, and by five tourism markets within each HC region. These tourism markets included outdoor recreation, heritage tourism, special-event tourism, nature-based tourism, and culinary tourism.

The size of the HC makes collecting primary data of visitor spending behavior challenging. For many counties within the Corridor, there are simply not enough visitors to make common intercept methods feasible. As a result, secondary methods were used to estimate the economic impacts. *Due to the use of secondary data, estimated impacts should be considered approximate values.*

Visitors to the HC were calculated based upon county accommodations tax data. The total number of visitors to the HC was 9.4 million. Tourism markets were identified through the analysis of travelers' needs and preferences within the Corridor. Of the visitors, 2.3 million were outdoor recreation tourists, heritage tourists, special-event tourists, nature-based tourists, and culinary tourists.

Economic Impact of the South Carolina National Heritage Corridor

- Visitors to the 14-county region annually generate \$624 million in direct economic impact. In addition, 9,389,120 tourists visited these counties in 2009. These visitors spent an average of \$45.83 per day and stayed in the corridor an average of 1.45 days. The Corridor's economic impact is

\$1.0 billion in total output impact; \$375 million earnings impact; \$91.4 million indirect tax impact; and 17,867 jobs.

Economic Impact within Regions of the South Carolina National Heritage Corridor

- The Mountain Lakes Region (Oconee, Pickens, and Anderson counties) had 990,000 visitors and a direct impact of \$66.4 million in 2009. From this initial spending, \$106.8 million of output, \$40.0 million of earnings, \$9.7 million in indirect business taxes, and 1,901 jobs were created. Within the Freshwater Coast Region (Abbeville, Greenwood, McCormick, and Edgefield counties) the direct impact was \$17.7 million, less than one-third of the direct impact generated in the Mountain Lakes Region. Visitors to this region were 266,000. As direct spending was less, economic impacts generated in the Freshwater Coast Region were less as well. Total output was \$28.4 million, earnings were \$10.6 million, indirect business tax was \$2.6 million, and jobs employment was 506. The Rivers, Rail, and Crossroads Region (Aiken, Barnwell, Bamberg, and Orangeburg counties) was similar to the Mountain Lakes Region. Direct spending by 1.2 million visitors within these counties was \$82.9 million while total output was \$133.3 million. In addition, earnings were \$49.8 million, indirect business tax was \$12.1 million, and employment was 2,373.
- The greatest impact was in the Lowcountry Region (Charleston, Colleton, and Dorchester counties) where 6.9 million tourists visited. Because of the number of tourists visiting Charleston and the coast of South Carolina as compared to the number of tourists visiting the rest of the regions, the direct impact of visitors was higher than the combined total of the Mountain Lakes, Freshwater Coast, and Rivers, Rail, and Crossroads regions. Direct impact in the Lowcountry region was \$457.2 million with a total

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output of \$735.0 million. The direct impact generated \$274.8 million in earnings, 13,086 jobs, and \$66.9 million in indirect business taxes. It should be noted that visitors to Charleston County accounted for 84.5% of the region’s visitors. The impacts on Colleton and Dorchester counties are statistically skewed as a result.

Economic Impact of Selected Market Segments within South Carolina National Heritage Corridor

- An estimate of the economic impacts of outdoor recreation, heritage tourism, special-event tourism, nature-based tourism, and culinary tourism on the HC were calculated. Also within each region, economic impacts were calculated based on total tourism and the aforementioned tourism market segments. For the overall corridor, outdoor recreation had the greatest number of visitors (751,000) and the largest total output (\$47.1 million). Heritage tourism had the second lowest number of tourists (235,000), but the second greatest total output (\$35.9 million). Heritage tourists spend \$114 per day while in the corridor—almost three times what was spent by outdoor recreation visitors.

TRAVELERS’ NEEDS AND PREFERENCES

Visitation and use of tourism resources such as the South Carolina National Heritage Corridor (HC) provides substantial social and economic benefits for local communities. Despite the Corridor’s importance as a context for policy assessment, there have not been any studies of tourism’s economic benefits of the HC. To fill the void in economic benefit information in the HC, managers must be provided comprehensive information about economic benefits. Thus, the primary purpose of this report is to provide important management information for decision-makers and officials.

Specific objectives are to: (1) provide an overview of current and potential travelers’ attitudes, preferences, and sociodemographic information; (2) understand the economic value of the Corridor that visitors obtain as benefits; and (3) examine travelers’ preferences for developing or adjusting new and/or existing heritage and cultural tourism products.

Three sampling frames were used to collect data for this study. Two of the sampling frames were purchased from Survey Sampling International, and the other was provided by the HC. Data for this study were collected using a modified Dillman (2007) procedure that included up to three contacts per respondent. The overall effective response rate for the combined sampling frames was 25.7% with a total of 388 returned questionnaires.

Survey Results:

Demographics

- The average age of respondents was almost 58 (57.9) years of age. Close to 50% (47.5%) of respondents were 60 years of age or older. Gender of respondents was evenly split with 49.7% female and 50.3% male. Over one-fourth (28.7%) reported a household income of \$100,000 or greater.

Discovery Centers

- Overall, almost 30% (29.2%) of respondents visited the Freshwater Coast Discovery Center in Edgefield and almost 20% (19.5%) the Rivers, Rail, and Crossroads Discovery Center in Blackville. Close to 5% (4.9%) of the respondents visited both and almost half (46.5%) did not visit either Discovery Center.
- When asked how they learned about the Discovery Center(s), over one-fourth (29.9%) of respondents had

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visited before and 28.8% heard about a Discovery Center(s) from a friend.

- Over 90% (91.6%) of respondents were very or extremely satisfied with the knowledge of the Discovery Center(s) staff (4.39 out of 5). On average, respondents were at least very satisfied with all of the items related to satisfaction with the Discovery Center(s) with the lowest satisfaction being the variety of local artisan works represented by a mean of 3.99.
- Of the 169 respondents who indicated at least one way the Discovery Center influenced their visit to the Corridor, 43.2% said they found a new attraction or site to visit in the Corridor. In addition, 39.1% indicated the Discovery Center(s) influenced them to plan another trip to the HC, and 36.7% decided to take a guided tour of the Discovery Center.

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- The average number of times respondents visited the HC in the past 12 months was just over five, and only 7.3% of respondents did not visit in the past 12 months. The average number of visits to the Corridor in the past five years was almost 18 (17.69). The number of respondents who had not visited in the past five years dropped to 2.6% from the 7.3% in the past 12 months.
- The most common purpose of visiting the HC for survey respondents was heritage tourism (44.8%), followed by attending a special-event (27.2%), and nature-based tourism (15.5%).
- Just over half (50.4%) of respondents indicated their most recent visit to the HC was with family. Over one-fourth (28.4%) of HC visitors' most recent trip was with a group tour and 21.6% with friends.

- Although over one-third (37.8%) of travel parties did not have any children, the average number of children per party was 4.39, which may be influenced by group trips such as school field trips as at least one respondent chaperoned such a trip to the Corridor. The average number of adults in travel parties for visiting the HC was 8.65, which again was influenced by group tours such as the Corridor's Ambassador Tours. Given that the sampling frame included Ambassador Tour participants who reported the total number in their tour group, the median of 2.00 may be a more accurate measure.
- Most (85.5%) of the trips to the Corridor were day-trips.
- The most frequently attended group tour of the HC was the Peaches, Politics and Pottery—Historic Edgefield taken by 45.7% of respondents. The second most popular tour was Native Americans, Mill Villages and Nuclear Energy (27.7%), followed by A Taste of South Carolina Lowcountry (20.2%) and History, Heritage, and the Gullah Culture (17.0%).
- Respondents agreed to strongly agreed that they visited the Corridor because of its historic background (4.14/5) and to learn about the Corridor (4.07/5). All of the reasons for visiting had a mean of 3.00 (3 = Neutral) or above except it being on the way to another tourism site/destination (2.89/5).
- Respondents said they would recommend that their friends visit the HC (4.36/5) and they will revisit in the future (4.26/5). However, respondents were slightly below agreed when asked if they would recommend friends visit even if they had to pay an entrance fee (3.97/5) and if they would revisit even if they had to pay an entrance fee (3.79/5).

Heritage Tourism

- Respondents were neutral to agreed when asked if visiting heritage sites is important to them (3.71/5) and if it is one of

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the most enjoyable things they do (3.56/5). When asked to indicate their level of satisfaction with various attributes of the Corridor during their visit, respondents were most satisfied with the natural beauty of the area (4.32/5), parking (4.17/5), and historical attractions (4.17/5). In addition, when asked about overall satisfaction, most (85.8%) were very or extremely satisfied with their most recent visit.

- Just over two-thirds (67.0%) of respondents classified themselves as a casual heritage tourist, defined as people whose heritage tourism activities are enjoyable, but infrequent.
- The top three characteristics that respondents said described the Corridor were friendly (4.04/5), family oriented (4.03/5), and wholesome (3.98/5) when ranked by the mean for each variable.

Culinary Tourism

- The most important food-related activities while traveling were related to the destination or locale. For example, the top three activities when ranked by means were sampling local foods (3.58/5), dining at places where food is prepared with respect to local tradition (3.57/5), and dining in restaurants serving regional specialties (3.51/5).

Economic Valuation of Heritage Tourism

- Providing policy-makers with information regarding the economic benefits generated from the use of HC services and facilities as well as the economic value placed on future use will assist in the decision of the most efficient allocation of public agency resources. The purpose of estimating these values is to provide agency leaders with essential information to evaluate process of policy and planning decisions. A contingent valuation method (CVM) was used

to provide estimates of the non-market value visitors and residents place on the HC.

- Closed-ended CVM questions were utilized to discover the amount visitors were willing to pay per day in excess of their actual trip costs associated with their Corridor experience using nine bid values ranging from \$0.50 to \$15.
- Visitors were less willing to pay (i.e., to respond “YES”) as the proposed bid amount increased.
- Visitors who were older and were more knowledgeable about heritage sites in the HC were more likely to respond “YES” to the contingent valuation question.
- Average visitors are willing to pay \$11.7 (i.e., benefit gain worth \$11.7). Using total number of visitors estimated above, total net willingness to pay at the population level was calculated. Multiplied by net willingness to pay of \$11.7, total visitors of 9,389,120 gained the economic benefits of \$109,852,704.

Travelers’ Preferences Assessment

- Respondents were interested in having additional education and interpretation materials and sessions as well as additional opportunities to experience local communities and cultures. However, respondents were less interested in heritage tour programs and the benefits of Corridor Cruiser membership, entitling participants to discounts and special offers within the HC.
- Two segmented groups were identified based on their prior trip experience to the Corridor: those who had visited the Corridor (HC User) and those who had not visited the Corridor (Non-User) in the past 5 years.
- The results generally corresponded with the researchers’ prior expectations as Corridor Users were more interested

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in taking heritage and cultural trips to the Corridor than Non-Users under the presented conditions.

- Further, Corridor Users seemed to be more interested in various programs proposed such as additional opportunities to buy local products, to have education and interpretation materials and sessions, and to experience local communities and cultures than Non-Users.
- Overall, management programs and services with more opportunities to buy local products, procure education and interpretation materials, and offer opportunities to experience local cultures are likely to appeal to both groups but to be more attractive to those with previous Corridor experience.