INCREASING AFRICAN-AMERICAN TOURISM IN SOUTH CAROLINA

A study by the SmartState Center of Economic Excellence in Tourism and Economic Development

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1. EXECUTIVE SUMMARY

African-American tourism has a cultural, historic and economic importance to South Carolina. Yet, very little is known about this market and South Carolina has yet to capitalize on the wealth of attractions and experiences that document the state's African-American heritage. The objectives of this study included the following key elements: to assess the current tourism resources and products that could attract visitors interested in African-American tourism experiences; to measure the demand for African-American tourism in South Carolina by surveying current, past, and potential visitors to identify their awareness, interest, and constraints to visiting the state; to quantify the economic impact of African-American travelers on the state of South Carolina; and to use this research to identify essential best practices and next steps in growing African-American tourism in the state. This study defined African-American tourism as visits by any race to African-American historic sites, themed events/festivals, tours, buildings such as churches, monuments, museums/theaters and even restaurants serving traditional Gullah cuisine. A key demographic within this market are African-American tourists, one of the fast-growing segments of the travel sector that spends more than $48 billion annually on travel. But research is needed to help determine how to attract and plan for this important market segment.

To address the research objectives, a mixed method approach was employed that included a comprehensive literature review, an inventory of African-American attractions in South Carolina, in-depth interviews and focus groups with key stakeholders, and surveys of current visitors, latent visitors and potential visitors. In the inventory, 522 tourism sites and attractions were identified, with over 470 classified as cultural and/or historic, which was by far the largest category. Most sites were not well maintained and promoted, and our site visits often found them closed, or with limited opening hours. There was little or no interpretation. Many of the sites were in need of repair and lacked updated infrastructure and technology. The focus group and interview participants acknowledged a need for investment in product development, followed by improved marketing, and recommended a more accurate portrayal of history at these sites. Stakeholders also suggested that racial issues are still prevalent in South Carolina which inhibit the growth and success of African-American tourism. There was a perceived lack of support, funding, and promotion at the state and local level, and the need was recognized for collaboration between organizations working on African-American tourism.

The surveys revealed significant differences between African-American respondents and others. For example, more African-American visitors traveled to the state for family reunions and for visiting friends and relatives than non-African-American visitors, and not surprisingly African-American visitors were significantly more interested in African-American cultural locations and attractions than non-African-American visitors. The removal of the Confederate flag had a positive influence on the decision to travel to South Carolina for all groups, but particularly for African-American travelers. However, fears of racial discrimination persist. Half of the African-Americans who had not been to the state fear racial discrimination if they were to visit (compared to 40% who have already visited). Overall, less than half of the respondents surveyed were familiar with South Carolina's African-American cultural attractions.

The economic impact analysis revealed that African-American tourists are responsible for $2.4 billion in economic impact for South Carolina, an impact that is associated with approximately 26,302 jobs and $789.5 million in labor income. Just a 5% increase in visitation from African-Americans will result in an economic impact of $118.6 million in annual output, and an additional 1,315 jobs and $39.5 million in labor income for South Carolinians. But the surveys showed that awareness is still low, with 55% of African-American visitors unfamiliar with African-American cultural attractions in South Carolina. Similarly, there is relatively little interest in the Gullah culture and Gullah Geechee Corridor, probably due to a lack of awareness.

The state therefore needs to invest in promoting African-American culture. Marketers in South Carolina may want to look to Australia, and their success in leveraging the Aboriginal culture. Marketers should simultaneously target the growing African-American tourist market. Domestic person-trips for African-Americans are expected to grow to 215 million by 2020, and with proper planning South Carolina could receive a larger percentage of African-Americans than most other states. This is likely to grow with targeted marketing, given the high interest shown in this study, but tourism advertisers in the state should consider including a higher representation of African-Americans in tourism advertising, in addition to promoting African-American cultural attractions. Marketers in South Carolina should also consider capitalizing on the African-American interest in genealogy. Similarly, reunions represent a tremendous opportunity to capture more of the African-American group tourism market. This was highlighted in the focus groups, as well as in the surveys, where two thirds of African-Americans said they already have friends or relatives in the state, 40% have been to South Carolina for a family reunion, and 50% plan to do so in the future.

But marketing alone will not be sufficient to capitalize on the potential for growing African-American tourism in the state. The surveys showed that most respondents who had visited South Carolina were somewhat unfamiliar with the African-American attractions in the state, and those who had visited African-American sites in South Carolina were not satisfied with their experiences. Investment is therefore needed in infrastructure and employee training. The study also showed that there are significant differences between African-Americans and other tourists with the cultural experiences they would like to explore, so attractions will need to segment and target relevant markets. African-Americans, for example, have little interest in visiting plantations, whereas plantations are high on the list for other groups of travelers. All respondents are interested in African-American museums, so the proposed African-American Museum in Charleston, due to open in 2019, should draw tourists from all backgrounds. There is also a common desire to taste African-American cuisine, although our inventory found very few businesses catering to this demand. Similarly, there is demand for African-American themed festivals and events, so South Carolina could emulate Dallas Tourism who specifically targeted African-Americans by hosting more events that would be attended by a large African-American audience.

The fear of racial discrimination is clearly a key barrier preventing tourists from visiting and needs to be addressed. This threatens South Carolina's competitiveness not just to attract more travelers, but to draw large-scale events, and even new businesses. Eradicating racial discrimination in tourism and the fear of racism in African-American traveler is a formidable task, but not unsurmountable, and South Carolina could become a role model in establishing a program to do so. Finally, the need for African-American community collaboration and involvement was highlighted in the focus groups. Respondents referred to the many organizations working on African-American tourism in the state, but said there is no clear indication that they communicate well with each other and that they have a clear goal and message. There is a need therefore for increased cooperation between all groups in South Carolina catering to African-American tourists, or providing African-American cultural experiences.

2. BACKGROUND

2.1 African-American Tourism

There are a number of ways one could define African-American tourism but for the purpose of this study we define it as visits by any race to African-American historic sites, themed events/festivals, tours, buildings such as churches, monuments, museums/theaters and even restaurants serving traditional African-American and Gullah cuisine. The African-American story lies at the very heart of South Carolina's heritage, and it is believed that half of today's African-American population in the US has ties to South Carolina (SCAAHC, 2015). A wealth of historic buildings documents the state's African-American heritage from slavery to freedom and from segregation and political and economic disenfranchisement to the struggle for equal rights.

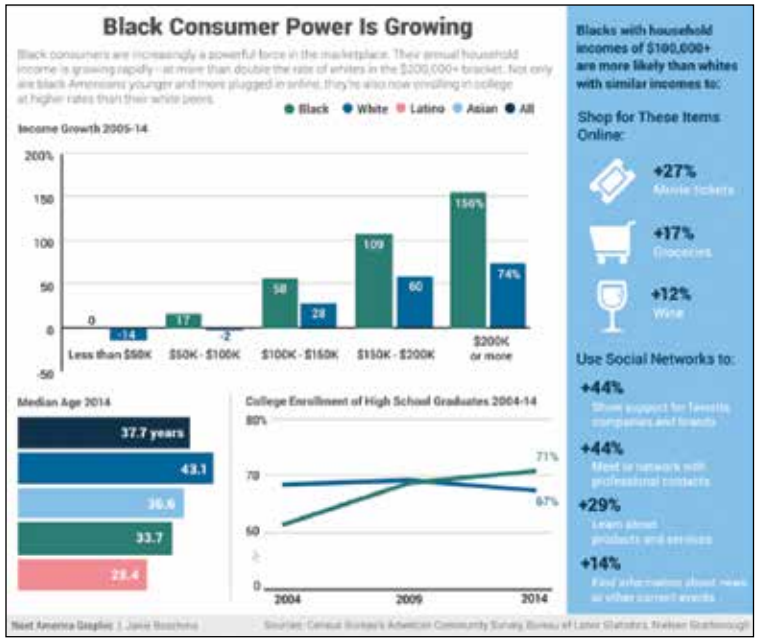
African-American tourism in the South is heavily influenced by the Gullah culture. The Gullah people of today are descendants of enslaved Africans from various ethnic groups of west and central Africa who were forced to work on the plantations of coastal South Carolina. The Gullah people are survivors - unique groups of African-Americans who lived near the coast and on barrier islands that were separated from the mainland by creeks, rivers, and marshes. Because of their geographic protection from outsiders and strong sense of family and community, Gullah people maintained a separate creole language and developed distinct cultural patterns. When the Civil War ended, many slaves fled the region. However, with their location in the low country and on the Sea Islands, the Gullahs were largely isolated and left alone in rural areas to continue to practice their traditional culture with little influence from outside. The Gullah have become an important source of cultural pride for African-Americans, making the South Carolina low country an increasingly popular pilgrimage for African-Americans all over the country. In addition, Gullah people now organize annual cultural events to celebrate their heritage, including the annual 'Gullah Festival' in Beaufort in May. In 2006, the US Congress passed the 'Gullah/Geechee Cultural Heritage Corridor Act', which provided $10 million over 10 years for the preservation of historic sites of relevance to Gullah culture. The corridor stretches from southern North Carolina to southern Florida and has been administered by the National Park Service.

Despite the fact that the Gullah culture represents a unique attribute in South Carolina, coastal development, changing job markets, and population shifts have forced many Gullah people to leave their ancestral family lands, and a number of communities have been lost to real estate development, encroachment by outsiders, and the resulting economic hardship. The traditional economy of farming, fishing, hunting, and small-scale marketing of subsistence products has been replaced by a suburban and resort service economy. These changes threaten Gullah cultural survival and their distinct identity as a people who have survived since colonial times.

2.2 The African-American Consumer

African-American consumers represent the largest consumers of color group in the US marketplace, a trend that will continue as the country becomes more diverse, driven in part by growth in immigration from the Caribbean and Africa. According to a Nielsen report on the 'untold story' of African-American consumers, as their population grows, so will their economic influence and buying power (Nielsen, 2015). The buying power of African-American consumers is predicted to be $1.4 trillion by 2019, accounting for 8.8% of the nation's total buying power (Humphreys, 2013; Nielsen, 2015). Despite the continued disparity between white and African-American workers' incomes, Nielsen suggest that African-American people earning more than $75,000 a year are growing faster in size and influence than whites, attributed to a number of factors including youthfulness, immigration, advanced educational attainment and increased digital acumen. Figure 1 below shows how African-American consumer power is growing, with annual household incomes rising rapidly, at more than double the rate of whites in the $200,000+ bracket.

Figure 1: The power of the African-American consumer



Other results of Nielsen's report include evidence of strong African-American growth among income earners above $100,00 in metro areas of the south, including areas of South Carolina. The report also highlights the opportunity to reach these affluent consumers online. They are more plugged in and more receptive to mobile advertising than other groups, and they are more likely than their white peers to shop online and interact with brands on social media. Findings showed that gatherings, festivals, reunions and other social events are popular among African-Americans. They are brand-loyal consumers and their purchasing behaviors are more likely to be influenced by a celebrity endorsement compared to non-Hispanic White groups, especially those at an income level from $50,000 to $75,000. Finally, African-American buying trends show an emphasis on family and cooking ingredients tied to cultural traditions, and an expectation that the brands they buy will support social causes.

African-Americans continue to live regionally and in the top major metropolitan areas. Collectively, 12 major US cities have an African-American population over 17 million. However, the reverse migration from northern and eastern urban cities to large southern cities continues as 55% of African-Americans live in the south. Young, college-educated, and forward-thinking African-American professionals are deciding to call the south home, with one in four newcomers having a four-year college degree, compared to one in six of African-American adults who already live in the south. According to Nielsen (2015), a strategic focus on African-Americans in key southern markets may provide companies with opportunities for market share growth. Ten such markets – Atlanta, Washington D.C., Houston, Dallas, Miami/Ft. Lauderdale, Raleigh, Baltimore, Memphis, Jackson, Mississippi and Columbia, South Carolina – have a minimum African-American population of 400,000. Collectively, these 10 southern cities have an African-American population of more than 10 million.

2.3 The African-American tourist

In terms of travel it has been suggested that the African-American travel market is the third fastest growing segment in the travel sector (Black Meetings & Tourism, 2012), with African-Americans spending more than $48 billion annually on travel (Lee, 2013). About 37% of these vacation trips are in the Southeast, and seven of the top ten markets are located on the East Coast with Atlanta ranked as number one (Travel and Tourism Market Research Handbook, 2011).

Appendix 1 summarizes the findings of a study of African-American travel conducted by Mandala Research in 2011 (Lundberg, 2013). According to the study, 13% of African-American leisure travelers take more than six trips per year (the average is 2.3), and they spend on average $886 as compared to the total leisure travel population total of $909. African-American's travel most frequently for leisure purposes (79%), especially to visit friends and relatives, a finding substantiated by the US Travel Association (2014). As suggested above, they travel most frequently in the Southern states, with South Carolina ranking in sixth place as top visited states in the South, behind Florida, Georgia, North Carolina, Texas, and Virginia. Interestingly, 81% of African-American travelers desire pampering as part of their travel experience, compared to 66% of the total leisure population. Other research has confirmed the importance of service for this segment. Black Meetings & Tourism (2012) found that the quality of service and quality of accommodation are the top two priorities when African-Americans choose their travel destinations. Group travel is twice as popular among African-Americans than whites, according to Charlie Presley, the founder of the African-American Travel Conference, perhaps pointing to a sense of security in numbers as well as the proliferation of African-American interest clubs and professional groups (Chideya, 2014).

Related to this last point, reunions are an important component of African-American travel. The Travel Industry Association of America found that 25% of hotel rooms are booked by people attending one of the 200,000 family reunions that take place each year. Family reunions have particular cultural importance for African-American families, and over 43% of African-American travelers have attended family reunions (Reunion Magazine, 2007). Compared to other ethnic and racial groups in American society, African-Americans tend to generally be more collectivist in nature (Samovar et al., 2007), their behavior often demonstrating the importance of family and the 'group' over individual needs and concerns (Vargus, 2002). One explanation for this collectivism is cohesion in times of hardship. African-Americans have faced considerable hardship in the US, from slavery to Jim Crow laws in the south; from the difficult times of the Civil Rights movement to more present institutional racism. As a response, many families and social groups took the path of community and support to overcome hardship. The Great Migration phenomenon, in which large populations of African-Americans migrated from their southern sharecropping homes to locales in the northern US to reap the benefits of the Industrial Revolution, caused African-Americans to be disbursed across the country and develop an even stronger history of reuniting to celebrate their heritage and family pride (Douglas, 2006).

Further, family structure in America changed dramatically due to this movement from rural to urban centers and the effects of government programs on African-American families, and as a result, African-Americans lost connection with extended family members. Family reunions have provided an opportunity for these families who have spread out around the US to come together once a year and reconnect with each other and redevelop their family identity. Historically, African-American family reunions have served as a resource tool to strengthen the extended family, leverage prosperity and invest in the future (Vargas, 2006). It should be noted that from the African and African-American viewpoint, 'family' does not need to be those related by blood but rather people such as godmothers and fathers and close familial friends that members may refer to as "aunt" or "uncle".

In terms of destination selection, African-American tourists rarely visit state/national parks as an outdoor recreation activity, but they are more likely than other groups to visit historical places and museums (Mandala Research, 2011). Their travel decisions are closely related with their feelings of welcome and racial acceptance, and for centuries, racism ideology has restricted African-American's mobility and accessibility to many tourism destinations. In fact, a recent study by Lee and Scott (2016), found that African-Americans continue to experience discrimination when they travel in the US. Their in-depth interviews revealed that African-American travelers frequently experience racial mistreatments from both service providers and other patrons of tourism-related

businesses. They tended to avoid unfamiliar places and view remote rural areas and wildlands as "off limits". They carefully planned their trips to avoid such locations, traveled with large groups, used established accommodations, and visited places where family and friends lived. Other research on this topic has found that many African-Americans perceive 'white' places as anxiety-inducing spaces and not as spaces of leisure (Carter, 2008). Europe, for example, has never been a popular African-American destination due to this perception (MacMaster, 2001).

Studies have shown that African-American travelers are more likely than other groups to rely on friends for travel information, and may ignore advertising that is not culturally appealing (Williams, 2006). In fact, it has been suggested that major hospitality companies and tour operators often steer clear of targeting African-Americans. This is surprising given that three quarters of trips taken by African-Americans include a hotel stay. As Chideya (2014) suggests, it is complicated. "Hoteliers are promoting women-only floors, but that idea would be anathema to African-American travelers, who are concerned about getting equal and respectful treatment from staff members. Similarly, tour operators pushing gay-friendly getaways would not be wise to advertise trips as 'black-friendly'."

3. OBJECTIVES

What is clear from past research is that there is strong demand from African-Americans to spend tourism dollars on culturally relevant sites and experiences. But research is needed to help determine how to attract this important market segment. Similarly, South Carolina has yet to capitalize on the wealth of attractions and experiences that document the state's African-American heritage. This study therefore had the following research objectives:

1) To assess the current tourism resources and products that could attract visitors interested in African-American tourism experiences by developing an updated statewide inventory of sites and experiences.

2) To identify the gaps and needs in developing sustainable tourism products and experiences related to the state's African-American culture and history.

3) To measure the demand for African-American tourism in South Carolina by surveying current and potential visitors to identify their awareness, interest, and constraints to visiting the state, as well as other factors that influence travel decisions.

4) To specifically quantify the economic impact of African-American travelers on the state of South Carolina and to better understand the role of African-Americans as part of South Carolina's tourism industry. Towards these ends, the study: (1) estimated the total economic impact of tourism on the state of South Carolina; (2) estimated the total economic impact of African-American tourism on the state of South Carolina; and (3) estimated the degree to which the economic impact of African-American tourism on South Carolina would increase as a result of various increases in the number of African-American visitors to the state.

5) To use this research to identify essential best practices and next steps in growing African-American tourism in the state.

4. METHODOLOGY

Objective 1): The research team conducted an inventory of African-American sites and available cultural experiences. Supply data was collected using mixed-methods to include a comprehensive scientific literature review and visits to collect primary and secondary data from organizations within South Carolina whose primary mission is to promote and/or preserve the state's culture and heritage. In addition, the team conducted 17 in-depth interviews with key stakeholders including tourism practitioners, business owners, visitors, government official and other key leaders who are African-American or have worked with African-American tourists.

Objective 2): A total of 5 focus groups were held in Greenville, Columbia, Myrtle Beach, Charleston, and Hilton Head. Representatives from private sector tourism businesses, convention and visitors' bureaus, hotels and resorts, and organizations that promote and protect cultural resources such as the Penn Center in Beaufort, were included. Focus groups secured information and opinions about the gaps, needs, and barriers to developing the best African-American tourism products/experiences.

Objective 3): Consumer data was collected in two phases. The first phase consisted of surveying current visitors to South Carolina on their perceptions of the state as a vacation destination for African-American tourism with a specific focus on spending patterns while visiting. To reduce the potential for selection bias resulting from data collection channels, about two thirds of the surveys were completed in person, many of them at African-American tourist sites, and the remainder were completed online post-vacation. In total, 367 surveys were completed.

In the second phase, an online panel survey of tourists from states other than South Carolina identified traveler awareness and interest in the state, particularly in relation to African-American tourism, along with constraints to visiting here. In order to enhance the representativeness of the sample and the generalizability of the results, we sampled 263 potential visitors (people who had never been to South Carolina), and 260 people who had been to the state before, but not in the last 12 months (latent travelers).

Objective 4): In order to calculate the indirect and induced effects, economic multipliers were used. To estimate the economic impact of visitor spending in South Carolina, a customized structural model (also known as an input-output model) of the South Carolina economy was used by the research team. This model contains specific linkages between all industries in South Carolina and can thus accurately capture all economic multiplier effects. The input-output modeling software *IMPLAN* was used to calculate all reported estimates. In this study, the economic activity that is generated through visitor

spending activity was estimated via three categories of impacts: total economic output, employment, and labor income.

Objective 5): The team generated a list of recommendations to disseminate with tourism leaders and hospitality-related organizations in the state.

5. RESULTS: INVENTORY OF AFRICAN-AMERICAN SITES AND AVAILABLE CULTURAL EXPERIENCES

Five hundred and twenty-two tourism sites and attractions were identified (a list can be provided upon request). Over 470 of those were classified as cultural and/or historic, which was by far the largest category. A large portion of this category included churches/religious sites and historic homes. The next largest category was services (i.e. tour operators and destination marketing organizations) with over 19 different entries. The third largest category was festivals and events with 15 different entries. Seven resources were classified as natural, and three as food and beverage. The highest number of sites are in The Capital City & Lake Murray Country areas (n=101). The next two regions with the most entries are Historic Charleston and Lowcountry and Resort Islands (n=76).

Most sites were not well maintained and promoted. Site visits often found them closed, or with limited opening hours. There was little or no interpretation. Many of the sites were in need of repair and lacked updated infrastructure and technology. Most of the individuals working and/or volunteering at these sites were enthusiastic about sharing their stories, cultural relevance and historic importance. Yet, they often lacked critical entrepreneur and hospitality skills (such as customer service, upselling, knowledge of the tourism industry, knowledge of the community, marketing). However, since many of the sites and attractions are located in economically depressed regions, if they were properly funded, managed, and promoted, they could be used as catalysts to transform their economies.

6. RESULTS: INTERVIEWS AND FOCUS GROUPS

A database of over 100 key stakeholders were identified with the assistance of key agencies within the tourism industry and those engaged in African-American related issues. Seventeen semi-structured interviews were conducted in March, April and May of 2016. Interviews lasted between 40 to 70 minutes and used an interview guide consisting of 9 primary questions. Following these in-depth interviews five focus groups were conducted in Columbia, Greenville, Hilton Head, Florence, and Charleston. Groups ranged from 7-14 in number. Focus groups were semi-structured following the same 6-question guideline. Interviews and focus groups were recorded, and then data was analyzed by four separate tourism researchers to established key themes. The data was then confirmed and synthesized.

Respondents were asked to discuss their opinions of South Carolina as a tourism destination in general. The state was described as a 'hidden jewel', popular with families, and having diverse tourism products. One said: "South Carolina is a great tourism destination, from the coast to the foothills up in the upper part of the state. And I actually think South Carolina is a hidden jewel that we really need to provide much more exposure for." Another agreed, saying: "We have diverse assets and a multitude of destinations and places that support family travel." Respondents suggested that the key strengths of South Carolina as a tourism destination were the richness in history and culture, geographic and natural diversity, southern hospitality, affordability, and diverse activities and attractions. "We have geographic diversity. We have the beaches, we have the lakes, rivers, creeks, mountains", said one.

Weaknesses of the state as a tourism destination could be summarized as a lack of infrastructure, low funding, underdeveloped tourism product, weak marketing, and unequal distribution of tourism benefits. "We do not have a gateway international airport within our state," said one. Another said: "Most people just know South Carolina for the beaches... we do a very poor job of looking at historical attractions that allow people to connect to their past ancestral lines." Another commented: "The benefits gained as a result of developing tourism are not equally distributed across community members... the black community gets the least amount of money."

Asked specifically about South Carolina's strengths as an African-American tourism destination, respondents commented on the rich history, African-American culture, family reunions, Charleston, and potential for growth. "There is a skeleton in the state that could really be built upon" said one. Another commented: "African-Americans have their whole culture, for instance, on the coast - the Gullah Culture. This is something that is deeply rooted in African-American history, their traditions, the food, the music." Another talked about reunions saying: "South Carolina is attractive to the African-Americans in the family reunion area specifically."

South Carolina's weaknesses as an African-American tourism destination were perceived as racial tensions, marketing, image, lack of support and lack of product development. "South Carolina has a negative connotation as far as sometimes being perceived as being more racist or bigoted", said one. Commenting on marketing one said: "The advertising campaigns aren't targeted. There's no targeting towards highlighting the African-American presence, African-American history, African-American culture." Another agreed saying: "There's not really a large emphasis on drawing African-Americans to South Carolina. And I think that we have to do a better job of marketing our state."

Responding to a question about the state's image, respondents tended to agree that South Carolina has a poor image, damaged because of racial issues. "This state being so steeped in racial divisions, it has given a national impression that the state is far behind in diversity". Others thought that the state's relationship to slavery has had a negative impact on image: "Enslavement of people. That's a negative image. People are like, "No, we don't want to come into a place that was a part of one of the major ports of enslavement of our ancestors and to deal with that right there. That's the negative image that a lot of people would have." But some suggested that this might have a positive

impact on tourism: “There are a lot of people in this country whose roots are through the state of South Carolina.” Asked what could be done to improve the image, respondents proposed African-American community collaboration and involvement, expansion and enhancement of marketing effort, benefit sharing, and promoting safety in the state. “If the state is not advertising in publications where it will most likely reach African-Americans with these things, there’s a likelihood there will be a disconnect.”

Perceived barriers to growing African-American tourism in the state were similar to the weaknesses mentioned above, such as a lack of investment, lack of education, the current system not benefiting African-Americans, racism, and a lack of support. “I think that the racism and the bigotry is probably the major barrier” said one. Others discussed funding: “There needs to be investment in some of the poor - predominantly African-American communities”. Another agreed: “Even the economic dollars that come from African-American tourism may not necessarily benefit African-Americans, or benefit African-American neighborhoods, or African-American entrepreneurs.” Respondents referred to the many organizations working on African-American tourism, but most are underfunded and there is no clear indication that they communicate well with each other and that they have a clear goal and message.

Respondents were asked to comment on the key attractors in the state for African-American tourism. Some talked about the history: “A key factor for attracting tourism for African-Americans in the state of South Carolina is the history... in the low country we have the Palmetto Trust, the South Carolina African-American Heritage Commission.” Others referred to churches: “The churches are key because we’re very spiritual,” while some mentioned the festivals: “The MOJA festival at Charleston, the Gullah festival at Beaufort, the Penn Center heritage festival in Charleston.” But a few referred to the beaches as a key attractor: “But it is the coast, and that has been a draw, I mean it’s the beaches of the state that I think many African-Americans find themselves.” But generally, respondents felt that more could be done to increase African-American tourism in terms of attracting tourists to themed museums and festivals, Historically Black Colleges and Universities, culinary sites, and historic churches.

Respondents were asked about marketing strategies they would recommend. They suggested the main target markets should be African-Americans, tourists interested in history and culture, international tourists, middle class professionals, and family reunions and funerals. The focus geographically should be (in order of importance) on the Southeast, the drive market, Northeast, East of the Mississippi, cities that have direct flights to South Carolina, and Africa. In terms of promotional strategies, many suggested focusing on ‘coming home’, given that many African-American roots are traced back to South Carolina. Similarly, others talked about promoting the ‘heritage and culture’ of the state. Many respondents suggested ‘telling a story’ and specifically telling the true story of African-Americans in South Carolina. Finally, ‘highlighting the uniqueness’ was a common theme, given that South Carolina’s place in history and culture is unique.

7. RESULTS: SURVEYS

7.1 Overall characteristics of previous, current and potential visitors

7.1.1 Demographic profiles

Previous visitors

Of the 260 previous visitors, most were female (79.2%), with the age range evenly distributed, in that 34.8% were under 35, 32.4% were between the age from 36 to 55, and 33.8% were above 56. Just over half (51.5%) of the previous visitors were Caucasian, 44.6% were African-American, with the rest being Hispanic, Asian, Native American, Multi-racial, or other races. Nearly half of the sample were married (48.1%). 63.5% of the previous visitors have attended some college or associate degree, or held a bachelor’s degree. Furthermore, 51.2% of the previous visitors had annual household income from $20,000 to $60,000 in 2015, and 20.7% of them earned $60,001 to $100,000. Finally, 45.8% of the previous visitors were employed full-time or part-time, and 22.3% were retired.

Current visitors

In total, 367 completed surveys were collected from current visitors in South Carolina. 41.6% were male and almost half of them (48.3%) were at the age of 35 and below. The rest of them were either between the age from 36 to 55 (34.9%) or above 56 (16.8%). 43.8% of the current visitors were Caucasian, 43.5% were African-American, whereas the rest of them were Hispanic, Asian, Native American, Multi-racial, or other races. 46.1% of the current visitors were single whereas 42.1% of them were married. 60.5% of them have attended some college or associate degree, or held a bachelor’s degree. Additionally, 36.2% of the current visitors had annual household income from $20,000 to $60,000 in 2015, followed by 26.5% of them earning $60,001 to $100,000. Most of the current visitors were employed full-time or part-time (74%).

Potential visitors

In total, we collected 263 completed surveys from potential visitors to South Carolina. 75.3% were female, 50.4% of them were under 35, 33.9% were between the ages from 36 to 55, and 15.7% of them were above 56. Meanwhile, 46.4% of the potential visitors were Caucasian, 45.2% were African-American, whereas the rest of them were Hispanic, Asian, Native American, Multi-racial, or other races. In terms of the marital status, 48.7% of the potential visitors were married and 40.7% were single. 71.1% of the potential visitors have attended some college or associate degree, or held a bachelor’s degree. Additionally, 42.6% of respondents had annual household income from $20,000 to $60,000 in 2015 while 27.3% of them earned $60,001 to $100,000. Lastly, most of the potential visitors were employed full-time or part-time (66.9%).

7.1.2 General travel behavior

Previous visitors

The top three reasons for previous visitors coming to the state were “vacation” (41.5%), “visiting friends and relatives” (32.7%), and “business” (5.0%). Visiting cultural or heritage

sites only received 1.2% among the reasons selected by previous visitors. In terms of the information search behavior, previous visitors collected travel information mostly from "friends and family" (63.8%), "general travel websites" (20.4%) and "South Carolina Visitor Center" (14.2%). Furthermore, on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral, "doing something with family or friends" (Mean = 5.9) was the strongest motivation to visit South Carolina among previous visitors, followed by "rest and relax" (Mean = 5.8), "get away from daily routine" (Mean = 5.7), "visit places related to my personal interests" (Mean = 5.2), and "be together as a family" (Mean = 5.2). Previous visitors were somewhat likely to revisit South Carolina in the future (Mean = 5.6), somewhat likely to recommend the state to their friends and relatives (Mean = 5.5) and to spread positive things about South Carolina as a tourism destination (Mean = 5.6).

18.1% of previous visitors traveled to South Carolina for a family reunion on average more than 2 times (Mean = 2.7). 18.1% of them planned to travel to the state for a family reunion in future. The top three reasons that they chose South Carolina as the destination for their family reunions were "I have friends and relatives living in South Carolina" (12.3%), "The attractions, accommodation and activities in South Carolina are appropriate for a family reunion" (6.5%), and "South Carolina is close to all my family members" (6.5%). The top three reasons that previous visitors did not choose South Carolina as the destination for their family reunions were "I am not planning a family reunion" (33.8%), "There are no friends and relatives living in South Carolina" (31.2%), and "South Carolina is far away from several (or all) of my family members" (24.2%).

Current visitors

On average, current visitors stayed for 4 nights when visiting South Carolina. The top three reasons for current visitors to visit the state were "vacation" (53.5%), "visit friends and relatives" (29.4%), and "family reunion" (5.8%). The top travel information source used by current visitors were "friends and family" (70.8%), "social media" (27.8%), and "general travel website" (27.5%). In addition, on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral, current visitors were mostly motivated by "doing something with family/friends" (Mean = 6.4), followed by "visiting places related to personal interests" (Mean = 6.1), "being together as a family" (Mean = 6.0), "eating local cuisine" (Mean = 5.7), and "visiting friends and relatives" (Mean = 5.4). On a scale from 1 = very unlikely to 7 = very likely with 4 = neutral, current visitors were likely to revisit South Carolina in future (Mean = 6.3), likely to recommend South Carolina to their friends and relatives (Mean = 6.2), and to spread positive things about South Carolina as a tourism destination (Mean = 6.2).

Furthermore, 26.4% of current visitors had traveled to South Carolina for a family reunion 5 times on average. 31.4% of them planned to travel to the state for a family reunion in future. The top three reasons that they chose South Carolina as the destination for their family reunions are "I have friends and relatives living in South Carolina" (18.8%), "The attractions, accommodation and activities in South Carolina are appropriate for a family reunion" (16.9%), and "South Carolina is close to all my family members" (13.1%). The top three reasons that they did not choose South Carolina as the destination for their family reunions are "South Carolina is far away from several (or all) of my family members" (15.5%), "we usually choose the place where my family comes from" (13.6%), and "There are no friends and relatives living in South Carolina" (12.8%). For the travel group size, most current visitors had about 4 to 5 adults and 1 to 2 children in their travel group. They spent 3 to 4 days doing their primary recreational activities such as relaxing on beaches, eating at local restaurants, and other activities such as visiting historical sites, shopping and walking tours in the downtown areas. Most of the current visitors stayed at hotels or motels, some of them chose rental accommodations such as Airbnb. The rest of them stayed at families' or friends' houses. On their recent trips to South Carolina, each current visitor spent on average more than $600 on lodging, about $350 on restaurants, $170 on transportation, $150 on retail, $100 on both entertainment and groceries, $40 on access fees, $30 on a guide or outfitter, and $18 on other things.

Potential visitors

All of the potential visitors (100%) stated that they took 4 or more leisure trips per year. On a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral, potential visitors rated their agreement on motivations to visit South Carolina in future. The top 5 motivations would be to "experience something different" (Mean = 6.2), "rest and relax" (Mean = 6.2), "get away from a daily routine" (Mean = 6.1), "learn new things and/or increase knowledge" (Mean = 6.0), and "visit interesting town/village" (Mean = 6.0). Potential visitors were somewhat likely to visit South Carolina (Mean = 5.3), and 22.8% of them planned to travel to South Carolina for a family reunion in the future. The top three reasons that they would not choose South Carolina as the destination for their family reunions are "There are no friends and relatives living in South Carolina" (43.3%), "South Carolina is far away from several (or all) of my family members" (24.7%), and "we usually choose the place where my family comes from" (19.4%).

7.1.3 African-American travel behavior

Previous African-American visitors

Previous visitor's overall impression of South Carolina as a destination to explore African-American culture was somewhat positive (Mean = 5.1), on a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral. 19.6% of the previous visitors had visited an African-American attraction, but were not generally satisfied (Mean = 1.2, on a scale from 1 = not satisfied at all to 7 = very satisfied with 4 = neutral). In terms of their familiarity with South Carolina's African-American cultural attractions such historical sites, museums, music, and food, previous visitors were somewhat unfamiliar with those attractions (Mean = 3.2, on a scale from 1 = not at all familiar to 7 = vary familiar with 4 = neural). Among the African-American culture related locations or attractions in those attractions, previous African-American visitors were mostly interested in visiting beaches (Mean = 5.6, on a scale from 1 = no at all interested to 7 = very interested with 4 = neutral), African-American cuisine (Mean = 5.2), African-American historical sites (Mean = 4.8), African-American music and dance (Mean = 4.8), and African-American themed museums (Mean = 4.7). In terms of to what extent that previous visitors considered South Carolina has promoted and marketed its African-

American cultural attractions, the average perception was below neutral (Mean = 3.9, on a scale from 1 = not well to 7 = extremely well with 4 = neutral). Furthermore, on a scale from 1 = not influential at all to 7 = extremely influential with 4 = neutral, previous visitors did not think South Carolina's African-American heritage, attractions and tourism sites had impacted their decision to visit South Carolina (Mean = 3.2).

Current visitors

On a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral, current African-American visitors' overall impression of South Carolina as a destination to explore African-American culture was somewhat positive (Mean = 5.3). 39.9% of the current visitors visited an African-American attraction. Unlike previous visitors, current visitors were generally satisfied with their trips to the African-American attractions (Mean = 6.0, on a scale from 1 = not at all satisfied at all to 7 = very satisfied with 4 = neutral). Moreover, on a scale from 1 = not at all familiar to 7 = very familiar with 4 = neural, current visitors were neither familiar nor unfamiliar with South Carolina's African-American cultural attractions such historical sites, museums, music, and food (Mean = 4.0). Among the African-American culture-related locations or attractions in South Carolina, current visitors were mostly interested in visiting beaches (Mean = 5.2, on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral), plantations (Mean = 5.2), African-American historical sites (Mean = 5.1), African-American cuisine (Mean = 5.1), African-American music and dance (Mean = 5.0), and African-American themed museums (Mean = 5.0). In terms of to what extent that current visitors thought the state had promoted and marketed its African-American cultural attractions, the average perception was above neutral (Mean = 4.5), on a scale from 1 = not well to 7 = extremely well with 4 = neutral. On a scale from 1 = not at all influential at all to 7 = extremely influential with 4 = neutral, the average perception about the extent to which South Carolina's African-American heritage, attractions and tourism sites has impacted current visitors' decisions to visit the state was above neutral as well (Mean = 4.5).

Potential visitors

On a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral, potential African-American visitors' overall impression of South Carolina as a destination to explore African-American culture were about somewhat positive (Mean = 5.0). On a scale from 1 = not at all familiar to 7 = very familiar with 4 = neutral, potential visitor's familiarization with South Carolina's African-American cultural attractions were below neural (Mean = 3.5). In terms of the locations/attractions in South Carolina related to African-American culture, potential visitors were most interested in beaches (Mean = 5.8), followed by African-American Cuisine (Mean = 5.7), African-American historical sites (Mean = 5.6), African-American themed museums (Mean = 5.5), and African-American music and dance (Mean = 5.4). In addition, potential visitors were somewhat neutral about the way South Carolina has promoted and marketed African-American cultural attractions (Mean = 4.1, on a scale from 1 = not well to 7 = extremely well with 4 = neutral). With the extent to which South Carolina's African-American heritage, attractions and tourism sites would influence potential visitors' decisions to visit South Carolina, respondents rated this somewhat influential (Mean = 5.1). Finally, the main perceived constraints for African-American travel were "lack of information or knowledge" (Mean = 3.8), "inconvenient accessibility" (Mean = 3.5), "lack of family programming" (Mean = 3.3), "lack of money or time" (Mean = 3.3), "lack of interest" (Mean = 2.9), and "safety" (Mean = 2.4).

7.1.4. Racial discrimination perceptions

Previous visitors

When asked whether the removal of the Confederate flag from the state capitol grounds last year influenced previous visitors' decisions to visit South Carolina, 75.8% of them indicated there was no influence. 15.4% of them indicated the removal made them want to visit the state more, whereas 8.8% stated the removal made them want to visit the state less. Likewise, the majority (82.7%) suggested that the shootings in Charleston in 2015 did not influence their decisions to visit. When asked to what degree they feared racial discrimination in South Carolina, the average rate was 3.2 on a scale from 1 = not fearful at all to 7= extremely fearful with 4 = neutral, indicating they were not fearful about possible racial discrimination when visiting South Carolina.

Current visitors

For current visitors, 69.9% of them indicated that the removal of the Confederate flag in 2015 had no influence on their decision to visit South Carolina. 25.9% of them said the removal made them want to visit the state more, whereas only 4.3% of them stated the removal made them want to visit the state less. Likewise, the majority suggested that the shootings in Charleston in 2015 did not influence their decision to visit. Surprisingly, 9.1% of them reported the shootings made them want to visit the state more. 8.2% of them stated the shootings made them want to visit the state less. In terms of the degree to which current visitors feared racial discrimination during their visit to South Carolina, the average rate was 2.9 on a scale from 1 = not fearful at all to 7 = extremely fearful with 4 = neutral, indicating that visitors in general were not fearful about possible racial discrimination.

Potential visitors

Generally, potential visitors were also not fearful about racial discrimination if they visited South Carolina. They did not view racial discrimination as a travel constraint for visiting African-American attractions or sites (Mean = 2.4). 39.5% of them indicated that they would visit South Carolina regardless of the Confederate flag coming down. 36.9% of them indicated the removal made them want to visit the state more, whereas only 4.6% of them stated the removal made them want to visit the state less. The rest of the potential visitors did not intend to visit the state anyway (19.0%). 52.1% of the potential visitors indicated they would visit the state regardless of the shootings, 20.9% of them stated the shootings made them want to visit the state less, whereas 8.7% of them reported the shootings made them want to visit the state more.

7.2 Comparison between African-American visitors and non-African-American visitors

7.2.1. Comparison of previous visitors

Comparison of general travel behavior

First of all, previous African-American and non-African-American visitors differed significantly in their primary reasons for visiting South Carolina ($\chi 2 = 16.3$, $p \leq 0.05$). More African-American visitors traveled to the state for family reunions and for visiting friends and relatives than non-African-American visitors. Reversely, more non-African-American visitors traveled to the state with the purpose of vacation, visiting natural resources and cultural/heritage sites, attending festivals and events, and doing business. The top motivations for traveling to South Carolina were similar for previous African-American and non-African-American visitors; the two groups being mostly motivated by family-orientated reasons and the desire to escape (see Tables 1 and 2).

Table 1: Motivations for traveling to South Carolina: previous African-American visitors

Rank	Motivation	Mean
1	Do something with my family/friends	6.16
2	Rest and relax	5.72
3	Get away from a daily routine	5.67
4	Be together as a family	5.55
5	Eat local cuisine	5.23
6	Visit places related to my personal interests	5.21
7	Visit outstanding scenery	5.15
8	Experience something different	5.14
9	Feel the special atmosphere of South Carolina	5.03
10	Learn new things and/or increase my knowledge	4.93

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

Table 2: Motivations for traveling to South Carolina: previous non-African-Americans visitors

Rank	Motivation	Mean
1	Rest and relax	5.78
2	Do something with my family/friends	5.76
3	Get away from a daily routine	5.64
4	Feel the special atmosphere of South Carolina	5.28
5	Visit places related to my personal interests	5.26
6	Visit outstanding scenery	5.23
7	Experience something different	5.21
8	Eat local cuisine	5.03
9	Be together as a family	4.97
10	Learn new things and/or increase my knowledge	4.94

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

In terms of their future travel behavior, previous African-American visitors (Mean = 5.9, on a scale from 1 = very unlikely to 7 = very likely with 4 = neutral) were significantly more likely to revisit South Carolina in the future compared to previous non-African-American visitors (Mean = 5.3, $t = 2.9$, $p \leq 0.05$). The differences were apparent in terms of African-American family reunion travel behavior. Twenty-five percent of African-Americans had previously traveled to the state for a family reunion and 27.6% of them planned to come for a family reunion in future. On the other hand, only 12.5% of previous non-African-American visitors have traveled to South Carolina for a family reunion before and only 10.4% of them planned to do so in future. The top reasons that previous African-American visitors traveled to South Carolina for a family reunion include "I have friends and relatives living in South Carolina" (18.1%), "South Carolina is close to all my family members" (10.3%), and "the attractions, accommodation and activities in South Carolina are appropriate for a family reunion" (10.3%). The top reasons that non-African-American visitors did not choose South Carolina as the destination for their family reunion include "I am not planning a family reunion (40.1%)", "there are no friends and relatives living in South Carolina" (36.1%), and "South Carolina is far away from several (or all) of my family members" (25%).

Comparison of travel behavior related to African-American culture

On a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral, the overall impression of South Carolina as a destination to explore African-American culture was significantly different between previous African-American visitors and non-African-American visitors ($t = 2.9$, $p \leq 0.01$). Previous African-American visitors had a stronger impression of the state as an African-American destination (Mean = 5.4) than did non-

African-American visitors (Mean = 4.9). Further, 26.7% of previous African-American visitors have visited an African-American attraction or tourism site during their trip to South Carolina, whereas only 13.9% of previous non-African-American visitors have done so. Among those who have visited an African-American attraction or tourism site, the satisfaction with their trips to the sites also differed significantly between previous African-American visitors and non-African-American visitors ($t = 3.0$, $p \leq 0.01$). Though overall both groups were not satisfied with their trips to the African-American attractions, previous African-American visitors were more satisfied (Mean = 1.74, on a scale from 1 = not at all satisfied 7 = very satisfied with 4 = neutral) than their non-African-American counterparts (Mean = 0.81) with the mean difference at 0.8. Not surprisingly, on a scale from 1 = not at all familiar to 7 = very familiar with 4 = neutral, previous African-American visitors (Mean = 3.6) were less unfamiliar with South Carolina's African-American cultural attractions than non-African-American visitors (Mean = 2.8, $t = 3.5$, $p \leq 0.01$).

Overall, African-American visitors were significantly more interested in various African-American cultural locations or attractions compared to non-African-American visitors (almost all of the t values were significant). On the scale from 1 = not at all interested to 7 = very interested with 4 = neutral, African-American visitors were significantly more interested in Historically Black Colleges and Universities (HBCU) (mean diff. = 201), African-American festivals (Mean diff. = 2.1), African-American themed museums (Mean diff. = 2.0), African-American historical sites (Mean diff. = 1.7), African-American cuisine (Mean diff. = 1.7), and African-American churches (Mean diff. = 1.5). In addition, the interest in family reunions as a destination activity differed strongly between the two groups with mean difference at 1.9. Table 3 and Table 4 demonstrate the details.

Table 3: Interest in locations/attractions: previous African-American visitors

Rank	Locations/Attractions	Mean
1	Beaches	6.19
2	African-American Cuisine	6.05
3	African-American Festival	5.78
4	African-American themed museums	5.77
5	African-American historical sites	5.74
6	African-American Music and Dance	5.62
7	Family reunions	5.4
8	Historically Black Colleges and Universities (HBCU)	5.28
9	African-American churches	5.05
10	Gullah culture	4.9

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Table 4: Interest in locations/attractions: previous non-African-American visitors

Rank	Locations/Attractions	Mean
1	Beaches	5.17
2	Plantations	4.58
3	African-American Cuisine	4.42
4	Slave dwellings	4.12
5	African-American Music and Dance	4.1
6	African-American historical sites	4
7	African-American themed museums	3.81
8	Gullah culture	3.72
9	African-American Festival	3.72
10	Gullah Geechee Corridor	3.71

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Furthermore, on a scale from 1 = not well to 7 = extremely well with 4 = neutral, there was no significant difference between previous African-American and non-African-American visitors in terms of to what extent they thought the state has promoted and marketed its African-American cultural attractions. Regarding how South Carolina's African-American heritage, attractions and tourism sites impacted previous visitors' decisions to visit, African-American visitors (Mean = 4.0 on a scale from 1 = not influential at all to 7 = extremely influential with 4 = neutral) were significantly more impacted than their non-African-American counterparts (Mean = 3.1, $t = 3.8$, $p \leq 0.01$).

Comparison of racial discrimination perceptions

First, in terms of the perceptions toward whether the removal of the Confederate flag influenced previous visitors' decisions to visit South Carolina, significant differences were found between African-American visitors and non-African-American visitors ($\chi 2 = 15.9$, $p \leq 0.01$). Comparatively, more African-American visitors considered the flag removal made them want to visit South Carolina more. However, more African-American visitors also thought the removal did not have an influence on their decisions to visit South Carolina (Table 5).

Table 5: Comparison of perceptions toward the removal of the Confederate flag

		African-American	Non-African-American
Did the removal of the Confederate flag from the state capitol grounds last year influence your decision to visit South Carolina?	No influence	77.6%	73.4%
	Yes, it made me want to visit the state more	20.7%	11.1%
	Yes, it made me want to visit the state less	1.7%	14.6%

Second, in terms of the perceptions toward whether the shootings in Charleston in 2015 influenced previous visitors' decisions to visit South Carolina, significant differences were revealed between African-American visitors and non-African-American visitors ($\chi 2 = 13.0$, $p \leq 0.01$). Comparatively, more African-American visitors considered the shootings made them want to visit South Carolina less. More non-African-Americans thought the shootings did not have an influence on their decisions to visit the state (Table 6). African-American visitors and non-African-American visitors differ significantly in terms of their fears of racial discrimination ($t = 4.4$, $p \leq 0.01$). African-American visitors (Mean = 3.8) were more fearful of racial discrimination than non-African-American visitors (Mean = 2.8). Specifically, African-American visitors were significantly more fearful of racial discrimination in rural parts of the state, in restaurants, from service providers, in hotels, from local residents, at local attractions, by other tourists, and in urban parts of the state (all p values were less than 0.01, mean differences in order).

Table 6: Comparison of perceptions toward the shootings in Charleston in 2015

		African-American	Non-African-American
Did the shooting in Charleston in 2015 influence your decision to visit South Carolina?	No influence	73.3%	90.3%
	Yes, it made me want to visit the state more	1.7%	0.7%
	Yes, it made me want to visit the state less	25.0%	9.0%

7.2.2 Comparison of current visitors

Comparison of general travel behavior

With regard to motivations to travel to South Carolina, the top three motivations for African-American visitors were "do something with my family/friends", "visit places related to my personal interests", and "be together as a family" (Table 7). For non-African-American visitors, the top one motivation was the same, but followed by "get away from a daily routine" and "eat local cuisine" (Table 8). Overall, African-American visitors were motivated by family and personal reasons whereas non-African-American visitors were motivated by the desire to escape, relax and experience different cultures.

Table 7: Motivations for traveling to South Carolina: current African-American visitors

Rank	Motivation	Mean
1	Do something with my family/friends	6.60
2	Visit places related to my personal interests	6.51
3	Be together as a family	6.44
4	Visit friends and relatives	6.32
5	Eat local cuisine	5.27
6	Rest and relax	4.56
7	Experience high quality restaurants	4.43
8	Visit sites that have received positive national press	3.72
9	Get away from a daily routine	3.25
10	Visit quality beaches	3.23

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

Table 8: Motivations for traveling to South Carolina: current non-African-American visitors

Rank	Motivation	Mean
1	Do something with my family/friends	6.22
2	Get away from a daily routine	6.02
3	Eat local cuisine	6.01
4	Rest and relax	5.94
5	Escape my work pressure	5.82
6	Visit interesting town and village	5.71
7	Visit places related to my personal interests	5.66
8	Experience high quality restaurants	5.64
9	Be together as a family	5.64
10	Feel the special atmosphere of South Carolina	5.58

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

In terms of their future travel behavior, African-American visitors (Mean = 6.0 on a scale from 1 = very unlikely to 7 = very likely with 4 = neutral) were less likely to spread positive word of mouth about South Carolina as a tourism destination compared to non-African-American visitors (Mean = 6.3, t = -2.6, $p \leq 0.05$). Current African-American visitors traveled in a larger group sized compared to non-African-American visitors. The number of adults (Mean = 4.1 compared to Mean = 3.7 in a non-African-American travel group, $p \leq 0.01$) and children (Mean = 4.2 compared to Mean = 3.7 in a non-African-American travel group, $p \leq 0.01$) in an African-American visitor's travel group is significantly larger." In terms of travel expenditures, African-American visitors spent significantly more on access fees, guide/outfitter, and entertainment (i.e., all p values were less than 0.01).

Comparison of African-American travel behavior

On a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral, the overall impression of South Carolina as a destination to explore African-American culture was significantly different between current African-American visitors and non-African-American visitors (t = 4.82, $p \leq 0.01$). Current African-American visitors had stronger impressions of the state as an African-American destination (Mean = 5.7) than non-African-American visitors (Mean = 5.0). Additionally, 45.3% of current African-American visitors have visited an African-American attraction or tourism site during their trips to South Carolina, whereas only 35.6% of non-African-American visitors have done so. Among those who have visited an African-American attraction or tourism site, the satisfaction with their trips to the sites differ significantly between current African-American visitors and non-African-American visitors (t = 4.0, $p \leq 0.01$). On a scale from 1 = not satisfied at all to 7 = very satisfied with 4 = neutral, current African-American visitors were more satisfied (Mean = 6.4) than their non-African-American counterparts (Mean = 5.6) with the mean difference at 0.8. Furthermore, on a scale from 1 = not at all familiar to 7 = very familiar with 4 = neutral, current African-American visitors (Mean = 4.5) were more familiar with South Carolina's African-American cultural attractions than non-African-American visitors (Mean = 3.6, t = 4.4, $p \leq 0.01$).

Overall, current African-American visitors were much more interested in various African-American cultural locations or attractions in South Carolina compared to non-African-American visitors (i.e., all t values were significant). On the scale from 1 = not at all interested to 7 = very interested with 4 = neutral, African-American visitors were significantly more interested in African-American themed museums (Mean diff. = 1.4), Historically Black Colleges and Universities (Mean diff. = 1.4), African-American music and dance (Mean diff. = 1.3), and African-American historical sites (Mean diff. = 1.3). In addition, the interest in family reunions as a destination activity differed significantly between the two groups with a mean difference of 1.9. Table 9 and Table 10 illustrate the details. With the extent to which South Carolina has promoted and marketed its African-American cultural attractions, a significantly better job was perceived by current African-American visitors (Mean = 4.9 on a scale from 1 = not well to 7 = extremely well with 4 = neutral) than that was perceived by non-African-American visitors (Mean = 4.3, t = 3.1, $p \leq 0.05$). With the degree to which South Carolina's African-American heritage, attractions and tourism sites impacted current visitors' decisions to visit the state, African-American visitors (Mean = 4.9 on a scale from 1 = not influential at all to 7 = extremely influential with 4 = neutral) were significantly more impacted than their non-African-American counterparts (Mean = 3.7, t = 5.7, $p \leq 0.01$).

Table 9: Interest in locations/attractions: African-American visitors

Rank	Motivation	Mean
1	African-American historical sites	5.84
2	Beaches	5.78
3	African-American music and dance	5.77
4	African-American themed museums	5.76
5	Other	5.74
6	family reunions	5.71
7	Plantations	5.67
8	African-American cuisine	5.61
9	Slave dwellings	5.21
10	African-American churches	5.19

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Table 10: Interest in locations/attractions: non-African-American visitors

Rank	Locations/Attractions	Mean
1	Beaches	5.03
2	Plantations	4.83
3	African-American cuisine	4.71
4	African-American historical sites	4.58
5	Gullah culture	4.51
6	Slave dwellings	4.48
7	African-American music and dance	4.45
8	African-American themed museums	4.35
9	African-American churches	4.22
10	Gullah Geechee Corridor	4.16

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Comparison of racial discrimination perceptions

In terms of the perceptions toward whether the removal of the Confederate flag would influence current visitors' decisions to visit South Carolina, a significant difference was found between current African-American visitors and non-African-American visitors ($\chi 2 = 32.9$, $p \leq 0.01$). Comparatively, more African-American visitors considered the removal made them want to visit more. More non-African-American visitors thought the removal did not have an influence on their decisions to visit (see Table 11).

Table 11: Comparison of perceptions toward the removal of the Confederate flag

		African-American	Non-African-American
Did the removal of the Confederate flag from the state capitol grounds last year influence your decision to visit South Carolina?	No influence	58.0%	79.4%
	Yes, it made me want to visit the state more	40.7%	14.4%
	Yes, it made me want to visit the state less	1.3%	6.2%

Regarding the perceptions toward whether the shootings in Charleston in 2015 influenced current visitors' decisions to visit South Carolina, significant differences were revealed between African-American visitors and non-African-American visitors ($^2 = 15.6$, $p \leq 0.01$). Comparatively, more African-American visitors considered the shootings made them want to visit South Carolina less. More non-African-Americans thought the shootings did not have an influence on their decisions to visit South Carolina (see Table 12).

Table 12: Comparison of perceptions toward the shootings in Charleston in 2015

		African-American	Non-African-American
Did the shootings in Charleston in 2015 influence your decision to visit South Carolina?	No influence	73.3%	89.2%
	Yes, it made me want to visit the state more	15.3%	4.6%
	Yes, it made me want to visit the state less	11.3%	6.2%

African-Americans and non-African-Americans differed significantly in terms of their fears for racial discrimination ($t = 5.8$, $p \leq 0.01$). African-American visitors (Mean = 2.4) were more fearful of racial discrimination during their visit to South Carolina than non-African-American visitors (M = 2.4). Specifically, African-American visitors were significantly more fearful of racial discrimination at local attractions, in restaurants, hotels, rural and urban parts of the state, and from service providers and local residents (i.e., all p values were less than 0.01).

7.2.3 Comparison of Potential Visitors

Comparison of general travel behavior

With regard to motivations to travel to South Carolina, the top three motivations of potential African-American visitors were "experience something different", "learn new things and/or increase my knowledge", and "rest and relax" (Table 13). For potential non-African-American visitors, the top three motivations were "rest and relax", "experience something different" and "get away from daily routine" (Table 14). Overall, the two groups' motivations to visit South Carolina were similar.

Table 13: Motivations to travel to South Carolina: potential African-Americans

Rank	Motivation	Mean
1	Experience something different	6.34
2	Learn new things and/or increase my knowledge	6.29
3	Rest and relax	6.25
4	Get away from a daily routine	6.24
5	Eat local cuisine	6.20
6	Visit interesting town/village	6.19
7	Visit places related to my personal interests	6.18
8	Do something with my family/friends	6.16
9	Visit outstanding scenery	6.14
10	Visit historic sites	6.14

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

Table 14: Motivations to travel to South Carolina: potential Non-African-Americans

Rank	Motivation	Mean
1	Rest and relax	6.07
2	Experience something different	6.05
3	Get away from a daily routine	5.90
4	Visit interesting town/village	5.85
5	Visit outstanding scenery	5.84
6	Do something with my family/friends	5.81
7	Eat local cuisine	5.81
8	Learn new things and/or increase my knowledge	5.8
9	Visit historic sites	5.74
10	Visit quality beaches	5.67

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

The overall interest in visiting South Carolina was significantly different between potential African-American visitors and non-African-American visitors ($t = 3.0$, $p \leq 0.01$). Potential African-American visitors had stronger interests in visiting South Carolina (Mean = 5.8) than non-African-American visitors (Mean = 5.3). Additionally, on a scale from 1 = very unlikely to 7 = very likely with 4 = neutral, African-American visitors were significantly more likely to visit the state in future (Mean = 5.62, $t = 3.1$, $p \leq 0.01$), compared to non-African-American visitors (Mean = 5.0).

The difference is apparent in terms of African-American family reunion travel behavior. Thirty-six percent of potential African-American visitors plan to travel to South Carolina for a family reunion in future, whereas only 11.8% of non-African-American visitors are planning a family reunion in the state. Furthermore, significant differences were also found between potential African-American visitors and non-African-American visitors in terms of African American travel constraints. Potential African-American visitors were less constrained by a lack of interest ($t = -4.7$, $p \leq 0.01$), lack of information or knowledge ($t = -2.9$, $p \leq 0.01$), lack of money or time ($t = -3.1$, $p \leq 0.01$), and inconvenient accessibility ($t = -2.6$, $p \leq 0.05$). No differences were found between the two groups in terms of safety/racial discrimination related constraints. The biggest difference lies in their lack of interest about African American tourism, in that African-American visitors are more interested and less constrained.

Comparison of African-American travel behavior

On a scale from 1 = extremely negative to 7 = extremely positive with 4 = neutral, the overall impression of South Carolina as a destination to explore African-American culture was significantly different between potential African-American visitors and non-African-American visitors ($t = 2.0$, $p \leq 0.05$). African-American visitors had stronger impression of South Carolina as an African-American destination (Mean = 5.3) than non-African-American visitors (Mean = 4.9). Additionally, on a scale from 1 = not at all familiar to 7 = very familiar with 4 = neutral, African-American visitors were significantly more familiar with South Carolina's African-American cultural attractions (Mean = 4.1, $t = 4.9$, $p \leq 0.01$) than non-African-American visitors (Mean = 2.9).

Overall, potential African-American visitors were much more interested in various African-American culture locations/attractions in South Carolina compared to non-African-American visitors (most of the t values are significant). On the scale from 1 = not at all interested to 7 = very interested with 4 = neutral, potential African-American visitors were most significantly more interested in Historical Black Colleges and Universities (Mean diff. = 2.2), African-American churches (Mean diff. = 1.5), African-American festivals (Mean diff. = 1.4), and African-American themed museums (Mean diff. = 1.3). In addition, the interest in family reunions as a destination activity differed strongly between the two groups with mean difference at 1.9. Tables 15 and 16 show the details.

Table 15: Interest in locations/attractions: potential African-American visitors

Rank	Locations/Attractions	Mean
1	African-American historical sites	6.21
2	African-American themed museums	6.18
3	African-American Cuisine	6.13
4	Beaches	6.07
5	Historically Black Colleges and Universities (HBCU)	6.07
6	African-American Music and Dance	6.01
7	African-American Festival	6.00
8	African-American churches	5.59
9	Family reunions	5.34
10	Slave dwellings	5.30

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Table 16: Interest in locations/attractions: potential non-African-American visitors

Rank	Locations/Attractions	Mean
1	Beaches	5.63
2	Plantations	5.32
3	African-American Cuisine	5.31
4	African-American historical sites	5.03
5	African-American themed museums	4.89
6	Slave dwellings	4.84
7	African-American Music and Dance	4.81
8	African-American Festival	4.58
9	Gullah culture	4.53
10	Gullah Geechee Corridor	4.31

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

With the extent to which South Carolina has promoted and marketed its African-American cultural attractions, a better job was perceived by potential African-American visitors (Mean = 4.6 on a scale from 1 = not well to 7 = extremely well with 4 = neutral) than perceived by non-African-American visitors (Mean = 3.6, t = 3.9, $p \leq 0.05$). Regarding the degree to which South Carolina's African-American heritage, attractions and tourism sites influenced current visitors' decisions to visit the state, potential African-American visitors (Mean = 5.7 on a scale from 1 = not influential at all to 7 = extremely influential with 4 = neutral) were more impacted than their non- African-American counterparts (Mean = 4.5, t = 5.7, $p \leq 0.01$).

Comparison of racial discrimination perceptions

In terms of the perceptions toward whether the removal of the Confederate flag would influence potential visitors' decisions to visit the state, significant differences were found between potential African-American visitors and non-African-American visitors ($\chi 2 = 9.2$, $p \leq 0.05$). Comparatively, more African-American visitors considered the removal of the flag made them want to visit South Carolina more. Non-African-American visitors were less likely to be influenced by the removal of the flag (see Table 17).

Table 17: Comparison of perceptions toward the removal of the Confederate flag

		African-American	Non-African-American
Has the removal of the Confederate flag from the state capitol grounds influenced your decision to visit South Carolina?	No, I do not intent to visit South Carolina anyway	16.0%	21.5%
	No, I would visit South Carolina regardless of the flag coming down	35.3%	43.1%
	Yes, it makes me want to visit the state more	46.2%	36.9%
	Yes, it makes me want to visit the state less	2.5%	6.3%

There were significant differences between African-American potential visitors and non-African-American potential visitors ($\chi 2 = 13.7$, $p \leq 0.01$) and their perceptions toward whether the shootings in Charleston in 2015. African-American potential visitors said the shootings made them want to visit the state less. More non-African-Americans were less influenced by the shootings (see Table 18).

Table 18: Comparison of perceptions toward the shootings in Charleston in 2015

		African-American	Non-African-American
Did the shootings in Charleston in 2015 influence your desire to visit South Carolina?	No, I do not intent to visit anyway	13.4%	22.2%
	No, I would visit South Carolina regardless of the shootings	46.2%	56.9%
	Yes, it made me want to visit the state more	10.1%	7.6%
	Yes, it made me want to visit the state less	30.3%	13.2%

Though as a whole potential visitors were not fearful of racial discrimination when traveling to South Carolina in the future, potential African-American visitors and non-African-American visitors differed significantly in terms of their level of fear for racial discrimination ($t = 3.6$, $p \leq 0.01$). African-American visitors (Mean = 4.13) were more fearful of racial discrimination than were non-African-American visitors (Mean = 3.2). Specifically, African-American visitors were significantly more fearful of racial discrimination from service providers, in hotels, restaurants, rural parts of the state, at local attractions, from local residents, by other tourists, and in urban parts of the state (i.e., all p values were significant and the level of fear was in order across those locations).

7.2.4 Comparison between previous, current and potential visitors

Comparison of general travel behavior

On average, potential visitors' motivations (Mean = 5.4) were significantly higher than previous (Mean = 4.5) and current visitors (Mean = 4.3). Specifically, the strongest significant differences among the three groups lied between potential and current visitors. Potential visitors had significantly stronger motivations than current visitors to visit mountainous areas (Mean diff. = 2.4*, * indicates significant difference), to be free to act the way they feel (Mean diff. = 2.2*), to experience something different (Mean diff. = 2.0*), to visit historical sites (Mean diff. = 1.9*), to learn new things and/or increase their knowledge (Mean diff. = 1.8*), to learn about different cultures (Mean diff. = 1.7*), to gain a sense of accomplishments (Mean diff. = 1.7*), to understand themselves (Mean diff. = 1.7*), to visit places friends have not been (Mean diff. =1.7*), and to develop their skills and abilities (Mean diff. = 1.6*). Previous visitors were least motivated by various factors. Details are presented in Tables 19, 20 & 21.

Table 19: Top 10 biggest motivational differences between potential and current visitors

Rank	Motivation	Mean
1	Visit mountainous areas	2.40
2	Be free to act the way I feel	2.17
3	Experience something different	2.02
4	Visit historic sites	1.91
5	Learn new things and/or increase my knowledge	1.83
6	Learn about different cultures	1.69
7	Gain a sense of accomplishments	1.68
8	Understand more about myself	1.66
9	Visit places friends have not been	1.66
10	Develop my skills and abilities	1.61

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

Table 20: Top 10 biggest motivational differences between potential and previous visitors

Rank	Motivation	Mean
1	Visit mountainous areas	1.60
2	Visit sites that have received positive national press	1.53
3	Visit historic sites	1.41
4	Learn about different cultures	1.37
5	Visit interesting town and village	1.35
6	Experience the region's night life and entertainment	1.33
7	Experience high quality restaurants	1.22
8	Visit quality beaches	1.13
9	Develop my skills and abilities	1.11
10	Meet interesting and friendly local people	1.08

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

Table 21: Top 10 biggest motivational differences between current and previous visitors

Rank	Motivation	Mean
1	Be free to act the way I feel	-1.53
2	Visit friends and relatives	1.11
3	Experience something different	-1.02
4	Feel the special atmosphere of SC	-0.99
5	Get away from a daily routine	-0.94
6	Visit places related to my personal interests	0.83
7	Visit outstanding scenery	-0.82
8	Visit mountainous areas	-0.81
9	Be together as a family	0.79
10	Learn new things and/or increase my knowledge	-0.74

**Note: on a scale from 1 = strongly disagree to 7 = strongly agree with 4 = neutral*

The three groups also differed significantly on their future intentions to visit South Carolina ($F = 41.2$, $p \leq 0.01$). The current visitors (Mean = 6.3) showed a much stronger intention of visiting in future, compared to previous visitors (Mean = 5.6) and potential visitors (Mean = 5.3).

Comparison of African-American travel behavior

The three groups differed significantly in terms of their overall impressions of South Carolina as a destination to explore African-American culture ($F = 3.3$, $p \leq 0.05$). Potential visitors (M = 5.0) are less enthusiastic about exploring African-American culture in the state than current visitors (M = 5.3). Meanwhile, the three groups also differed significantly in their familiarization with South Carolina's African-American cultural attractions ($F = 14.5$, $p \leq 0.01$). Current visitors (Mean = 4.0) were more familiar with South Carolina's African-American cultural attractions than both previous (Mean = 3.2) and potential visitors (Mean = 3.5).

Furthermore, potential visitors held the highest average interest for visiting various African-American locations/attractions in South Carolina (Mean = 5.0), followed by current visitors (Mean = 5.3) and previous visitors (Mean = 4.5). Specifically, the strongest significant differences lied in the comparison of potential and current visitors in their interest in African-American festivals (Mean diff. = 1.94), and of current and previous visitors in their interests in African-American festivals (Mean diff. = -1.35). Tables 22 to 24 illustrate the details.

Table 22: Top 10 biggest differences in interest for visiting African-American locations/ attractions between current and previous visitors

Rank	Interested African-American Locations/Attractions	Mean differ
1	Other	2.13
2	African-American festival	-1.35
3	Plantations	0.60
4	Gullah culture	0.47
5	African-American churches	0.44
6	Slave dwellings	0.43
7	Beaches	-0.41
8	African-American historical sites	0.35
9	Gullah Geechee Corridor	0.31
10	Family reunions	0.31

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Table 23: Top 10 biggest differences in interest for visiting African-American locations/ attractions between potential and current visitors

Rank	Interested African-American Locations/Attractions	Mean differ
1	Other	-1.98
2	African-American festival	1.94
3	Beaches	0.62
4	Historical Black Colleges and Universities (HBCU)	0.60
5	African-American cuisine	0.57
6	African-American themed museums	0.51
7	American historical sites	0.44
8	Family reunions	-0.37
9	African-American music and dance	0.32
10	Slave dwellings	0.28

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Table 24: Top 10 biggest differences in interest for visiting African-American locations/ attractions between potential and previous visitors

Rank	Interested African-American Locations/Attractions	Mean differ
1	African-American themed museums	0.79
2	African-American historical sites	0.79
3	Slave dwellings	0.71
4	Plantations	0.70
5	Historical Black Colleges and Universities (HBCU)	0.70
6	African-American festival	0.59
7	African-American music and dance	0.57
8	African-American cuisine	0.53
9	African-American churches	0.52
10	Gullah culture	0.50

**Note: on a scale from 1 = not at all interested to 7 = very interested with 4 = neutral*

Furthermore, there was a significant difference among the three groups in terms of the promotion and marketing of African-American cultural attractions ($F = 9.4$, $p \leq 0.01$). Compared to both potential (Mean = 4.1) and potential visitors (Mean = 4.0), current visitors (Mean = 4.5) rated significantly higher on South Carolina's marketing effort in African-American cultural attractions. Finally, the three groups differed significantly in their perception about the extent to which South Carolina's African-American heritage, attractions and tourism sites have influenced their decisions to visit ($F = 42.0$, $p \leq 0.01$), in that potential visitors considered the state's African-American cultural attractions to be much more influential on their future travel decisions (Mean = 5.1), compared to current (Mean = 4.2) and previous visitors (Mean = 3.5).

Comparison of racial discrimination perceptions

With regard to the extent to which the removal of the Confederate flag from the state capitol grounds last year influenced their decisions to visit South Carolina ($\chi 2 = 178.5$, $p \leq 0.01$), potential visitors (36.9%) wanted to visit the state more because of the removal, followed by current (25.9%) and previous visitors (15.4%). More previous visitors (75.8%) were not influenced by the flag's removal, compared to current (69.9%) and potential visitors (39.5%) (Table 25).

Table 25: Comparison of perceptions toward the removal of the Confederate flag among previous, current and potential visitors

		Previous	Current	Potential
Has the removal of the Confederate flag influenced your decision to visit South Carolina?	No influence	75.8%	69.9%	39.5%
	Yes, it made me want to visit the state more	15.4%	25.9%	36.9%
	Yes, it made me want to visit the state less	8.8%	4.3%	4.6%

In their perceptions towards the extent to which the 2015 shootings in Charleston in influenced their decisions to visit South Carolina ($\chi^2 = 170.5$, $p \leq 0.01$), more potential visitors (20.9%) wanted to visit the state less because of the shootings, followed by previous (16.2%) and current visitors (8.2%). More previous visitors (82.7%) and current visitors (82.7%) thought there was no influence on their travel decisions, compared to potential visitors (51.7%).

Table 26: Comparison of perceptions toward the shootings in Charleston in 2015 among previous, current and potential visitors

		Previous	Current	Potential
Did the shootings in Charleston in 2015 influence your decision to visit South Carolina?	No influence	82.7%	82.7%	51.7%
	Yes, it made me want to visit the state more	1.2%	9.1%	9.1%
	Yes, it made me want to visit the state less	16.2%	8.2%	20.9%

The three groups differed significantly in their level of fear for racial discrimination during their visit to South Carolina ($F = 11.1$, $p \leq 0.01$). Potential visitors (Mean = 2.9) were significantly much more fearful about racial discrimination when traveling to South Carolina than current visitors (Mean = 2.9).

8. RESULTS: ECONOMIC IMPACT OF AFRICAN-AMERICAN TOURISTS IN SOUTH CAROLINA

8.1 Methodology

The tourism industry is one of the largest drivers of economic activity in South Carolina. According to the South Carolina Department of Parks, Recreation, and Tourism (SCPRT), nearly 30 million people visit South Carolina every year, consisting of over 14 million trips and 110 million visitor days. Tourists come to South Carolina for many reasons and generate demand for goods and services in a variety of industries, including everything from hotels and restaurants to historical sites to the many entertainment outlets located throughout the state. The purpose of this part of the study is to specifically quantify the economic impact of African-American travelers on the state of South Carolina and to better understand the role of African-Americans as part of South Carolina's tourism industry. Towards these ends, this study will (1) estimate the total economic impact of tourism on the state of South Carolina; (2) estimate the total economic impact of African-American tourism on the state of South Carolina; and (3) estimate the degree to which the economic impact of African-American tourism on South Carolina would increase as a result of various increases in the number of African-American visitors to the state.

The primary impact that arises from visitors to South Carolina comes in the form of new local spending activity that occurs by these visitors and increases demand for a variety of goods and services over what it would have been otherwise. One of the important components of economic growth in any region is the ability to attract spending from outside of that region. This is why national and international firms, tourism, and export-oriented manufacturing are important to South Carolina's economic growth; they bring new spending to the state, which then translates into new jobs and additional income.

There are three specific types of economic impacts that can be measured from an initial increase in demand resulting from visitor spending activity: *direct, indirect,* and *induced*. The direct impact simply refers to the initial change in economic activity. For example, if tourists who visit South Carolina frequent the local restaurants while they are here, this would create new demand for these restaurants that did not previously exist.

This direct impact would then lead to a series of indirect effects, which refer to the additional rounds of spending activity that occur due to inter-industry linkages between other local firms within South Carolina. For example, if the restaurants cited above experienced an increase in demand, this would lead them to purchase additional supplies such as the many ingredients they use to prepare their entrees. The food wholesalers they purchase from, in turn, would then experience an increase in demand and be required to purchase additional inputs from their own suppliers, and so on. If the increase in demand is high enough, these suppliers may also have to hire new workers in addition to buying more supplies. These indirect effects spread across many industries in South Carolina. The total indirect effect is a function of the size of the in-state supplier network.

The induced effect refers to the additional economic impact that results from increases in household spending activity. For example, when the restaurants cited above experience an increase in demand and hire additional employees to facilitate this demand, these employees will spend part of their income in the local economy. This spending activity then sets off yet more rounds of additional local spending that generates further economic activity.

These successive rounds of indirect and induced spending activity do not go on forever, which is why each of these impacts can be quantified. In each round of spending, money is "leaked out" of the local economy for a variety of reasons. For example, firms may buy inputs from out-of-state vendors or workers may choose to save a portion of their incomes.

In order to calculate the indirect and induced effects, economic multipliers are used. To estimate the economic impact of visitor spending in South Carolina, a customized structural model (also known as an input-output model) of the South Carolina economy was used by the research team. This model contains specific linkages between all industries in South Carolina and can thus accurately capture all economic multiplier effects. The input-output modeling software *IMPLAN* was used to calculate all reported estimates. In this study, the economic activity that is generated through visitor spending activity is estimated via three categories of impacts: total economic output, employment, and labor income. Each of these is summarized in Table 27 below.

Table 27: Categories of economic impacts

Impact Type	Definition
Total Economic Output	The dollar value representing the total contribution to economic activity
Employment	The total number of full-time equivalent jobs necessary to produce and deliver the goods and services as measured by total economic output
Labor Income	The dollar value representing all wages, salaries, and benefits associated with total employment

8.2 Estimating direct spending activity among South Carolina visitors

According to SCPRT (2016), approximately 29.2 million people visit the state of South Carolina every year. In order to assess the spending patterns of these individuals, this study analyzed 367 responses collected from a survey distributed to South Carolina visitors that requested information on each visitor's group size, length of stay, and spending patterns. Table 28 summarizes these results[1] for all survey respondents, African-American survey respondents, and then compares these responses to February 2016 estimates reported by SCPRT.

Table 28: Average spending activity of visitors to South Carolina

	All Survey Respondents	African-American Survey Respondents	Results from Feb. 2016 SCPRT Analysis
Avg. Group Size	3.7 adults	3.4 adults	2.0 adults
Avg. Length of Stay	2.3 nights	2.2 nights	2.8 nights
Total Dollars Spent on Visit	$408/person	$402/person	$352/person
Sample Size	367	141	N/A

Survey responses indicate that the average group to visit South Carolina consists of 3.7 adults who stay 2.3 nights. The average expenditure per person is $408. Similarly, African-American visitors to South Carolina have an average group size of 3.4 adults who stay 2.2 nights and spend $402 per person. Thus, the total expenditures among African-American tourists to South Carolina do not appear to significantly differ from the population as a whole based on data from our survey. Nevertheless, the survey results show that per person visitor spending is approximately 15.9% higher than reported by SCPRT and that the average group size of travelers is nearly twice as high.

8.3 Estimating the economic impact of visitor spending on South Carolina

According to the most recent five-year average of the TNS National Travel Survey from TravelsAmerica, African-American travel parties accounted for approximately 12% of annual visitation to South Carolina (TNS, 2016). This includes all business, VFR (visiting friends and relatives), and leisure travel. Table 29, therefore, combines this assumption with the survey results highlighted in Table 28 to document both the estimated total travel expenditures made in South Carolina as well as those made by African-Americans alone.

Table 29: Total estimated visitor spending in South Carolina

	Total (all races)	African-Americans
Total Dollars Spent on Visits to S.C.	$408/person	$402/person
Total Annual Visitors to S.C.	29.2 million	3.5 million
Total Travel Expenditures	$11.9 billion	$1.4 billion

Total annual visitor spending in South Carolina is estimated to be approximately $11.9

[1] *Note that observations in which survey respondents reported hotel/motel lodgings and no accompanying lodging expenditures were excluded from this analysis to avoid biasing the aggregate total expenditure estimates.*

billion, with African-Americans comprising about $1.4 billion (or 12%) of this total. These direct travel expenditures can be used to determine the total economic impact of visitor spending on the state of South Carolina, which will include this direct activity as well as all economic multiplier effects. These results are highlighted in Table 30.

Table 30: Annual economic impact of visitor spending in South Carolina

All Visitors			
	Employment	Labor Income	Economic Output
Direct Effect	160,809	$4,244,500,354	$11,963,198,725
Indirect Effect	28,103	$1,177,727,721	$3,882,471,465
Induced Effect	30,275	$1,157,140,524	$3,920,648,435
Total Effect	219,187	$6,579,368,600	$19,766,318,625
African-American Visitors			
	Employment	Labor Income	Economic Output
Direct Effect	19,297	$509,340,043	$1,435,583,847
Indirect Effect	3,372	$141,327,327	$465,896,576
Induced Effect	3,633	$138,856,863	$470,477,812
Total Effect	26,302	$789,524,232	$2,371,958,235

As of 2016, the total annual economic impact of all visitor spending in South Carolina is estimated to be approximately $19.8 billion. This is associated with 219,187 jobs and over $6.5 billion in labor income for South Carolinians that would not exist otherwise. The $11.9 billion in direct spending activity that is injected into the state's economy through the 29.2 million people that visit the state every year generates approximately 160,809 direct jobs and $4.2 billion in labor income. Businesses experiencing an increase in demand from this direct visitor spending, in turn, purchase additional supplies from their vendors (the indirect effect) and hire additional workers who then spend part of their incomes in the local economy (the induced effect). Together, these subsequent rounds of spending activity – known as the economic multiplier effect – generate an additional 58,373 jobs and $7.8 billion in economic activity.

African-Americans visitors to South Carolina are estimated to generate a total annual economic impact of $2.4 billion, or 12% of the total impact resulting from all South Carolina visitor spending. This impact is associated with approximately 26,302 jobs and $789.5 million in labor income.

8.4 Estimating the economic impact of increases in African-American tourism in South Carolina.

Under the assumption that the spending patterns of the average African-American group that visits South Carolina continues to fit the distribution captured in our survey results, then Tables 31-33 document the expected annual economic impact that would arise from 5-, 15-, and 25-% increases in the current rate of African-American visitation to South Carolina.

Table 31: Additional annual economic impact resulting from a 5% increase in African-American visitation to South Carolina

	Employment	Labor Income	Economic Output
Direct Effect	965	$25,467,002	$71,779,192
Indirect Effect	169	$7,066,366	$23,294,829
Induced Effect	182	$6,942,843	$23,523,891
Total Effect	1,315	$39,476,212	$118,597,912

Table 32: Additional annual economic impact resulting from a 15% increase in African-American visitation to South Carolina

	Employment	Labor Income	Economic Output
Direct Effect	2,895	$76,401,006	$215,337,577
Indirect Effect	506	$21,199,099	$69,884,486
Induced Effect	545	$20,828,529	$70,571,672
Total Effect	3,945	$118,428,635	$355,793,735

Table 33: Additional annual economic impact resulting from a 25% increase in African-American visitation to South Carolina

	Employment	Labor Income	Economic Output
Direct Effect	4,824	$127,335,011	$358,895,962
Indirect Effect	843	$35,331,832	$116,474,144
Induced Effect	908	$34,714,216	$117,619,453
Total Effect	6,576	$197,381,058	$592,989,559

As Tables 31-33 denote, the additional annual economic impact of marginal increases in African-American visitation to South Carolina can vary significantly. Under the most conservative assumption of African-American visitation to South Carolina increasing beyond its current rate by just 5%, the economic impact would increase by approximately $118.6 million in annual output, which is associated with 1,315 additional jobs and $39.5 million in labor income for South Carolinians. If African-American visitation expanded by 25%, then the economic impact would expand by approximately $593.0 million in total output, which is associated with 6,576 new jobs and $197.4 million in labor income for South Carolinians.

9. RECOMMENDATIONS

The highlight of this study is that African-American tourists are responsible for $2.4 billion in economic impact for South Carolina, an impact that is associated with approximately 26,302 jobs and $789.5 million in labor income. There is also significant potential to grow this segment, along with high interest from travelers of *all* races outside of the state wanting to explore our African-American cultural experiences. Just a 5% increase in visitation from African-Americans will result in an economic impact of $118.6 million in annual output, and an additional 1,315 jobs and $39.5 million in labor income for South Carolinians. But awareness is still low, with 55% of African-American visitors not familiar with African-American cultural attractions. Similarly, the low interest in the Gullah culture and Gullah Geechee Corridor is probably due to a lack of awareness – those outside of South Carolina are just not familiar with the rich culture that the state has to offer.

So given the huge potential, the state needs to invest in actively promoting African-American culture. Marketers in South Carolina may want to look to Australia, and their success in leveraging the Aboriginal culture. Indigenous tourism experiences there have been identified as a key international tourism driver. Currently, 14% of international visitors to Australia participate in an Aboriginal cultural experience during their visit, worth $6.4 billion annually, with visitors from the UK, North America and Europe most likely to participate in these experiences (Tourism Australia, 2016). To increase awareness and participation in indigenous tourism experiences, Tourism Australia's 2015-16 tourism campaign puts the spotlight on the aboriginal culture. The 'Aboriginal Australia: Our Country is waiting for you' film and various cut down versions are available to download from Tourism Australia's video gallery.

In addition to promoting African-American culture in South Carolina, marketers should simultaneously target the growing African-American tourist market. Domestic person-trips for African-Americans are expected to grow to 215 million by 2020 (Benavides, 2014), and South Carolina receives a larger percentage of African-Americans than most other states. This is likely to grow with targeted marketing, given the high interest shown in this study, but tourism advertisers in the state should to consider including a higher representation of African-American people in tourism advertising, in addition to promoting African-American cultural attractions.

As discussed in the focus groups, there are very few companies in South Carolina specifically targeting the African-American traveler. One exception is the website *https:sweetgrassexpress.com*, run by the Dejo Gropu, a marketing firm in Charleston that also organizes events such as the Sister Summit, an annual networking conference for African-American women. It appears that reaching African-American consumers online like this can pay dividends. This study, and the Nielsen report referred to earlier, highlighted the opportunity to reach African-American consumers online as they are more plugged in and more receptive to social media and mobile advertising than their white peers. Affluent African-Americans are also more likely to use social networks to find out about products and services. The Nielsen report notes the wealth of data companies can mine from social media platforms like Twitter. The four TV shows for example with the most engaged African-American Twitter followers are Power, Blackish, Empire and How to Get Away with Murder. Cross-referencing tweets about those shows and users' other tweets, Nielsen have pinpointed how each show's followers are likely to shop and interact with brands. Of interest to travel marketers is the fact that Blackish fans are most likely to tweet about travel services.

Marketers in South Carolina should also consider capitalizing on the African-American interest in genealogy. Genealogy tourism (sometimes called roots tourism) is a growing segment of the tourism market consisting of tourists who have ancestral connections to their holiday destination. Northern Ireland, for example, receives up to 20,000 annual visitors from overseas who participate in genealogical activities during their trips. There are a growing number of online genealogy services that marketers in South Carolina could work with. African Ancestry, for example, is the world leader in tracing maternal and paternal lineages of African descent having helped more than 150,000 people re-connect with the roots of their family tree. Related to this point, reunions represent a tremendous opportunity to capture more of the African-American group tourism market. This was highlighted in the focus groups, as well as in the surveys, where two thirds of African-Americans said they already have friends or relatives in the state, 40% have been to South Carolina for a family reunion, and 50% plan to do so in the future.

But marketing alone will not be sufficient to capitalize on the potential for growing African-American tourism in the state. Although South Carolina has numerous African-American historic and cultural tourism sites, many are not well maintained, and interpretation at the sites is poor. The surveys showed that overall respondents who had visited African-American attractions in South Carolina were not satisfied with their experiences. Investment is therefore needed in infrastructure and employee training. The study also showed that there are significant differences between African-Americans and other tourists with the cultural experiences they would like to explore, so attractions will need to segment and target relevant markets. African-Americans, for example, have little interest in visiting plantations, whereas plantations are high on the list for other groups of travelers. All respondents are interested in African-American museums, so the proposed African-American Museum in Charleston, due to open in 2019, should draw tourists from all backgrounds. There is also a common desire to taste African-American cuisine, although our inventory found very few businesses catering to this demand. Similarly, there is demand for African-American themed festivals and events, so South Carolina could emulate Dallas Tourism who specifically targeted African-Americans by hosting more events that would be attended by a large African-American audience.

The fear of racial discrimination is clearly a key barrier preventing tourists from visiting and needs to be addressed. All the focus group participants agreed on this, and in the surveys, over 50% of potential African-American tourists said that they fear racial discrimination if they were to visit the state. This threatens South Carolina's competitiveness not just to attract more travelers, but to draw large-scale events, and even new businesses. Columbia for example (already with a 40% African-American population)

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could be huge draw for African-American tourists, given that there are over 100 African-American cultural sites and attractions in the area. Eradicating racial discrimination in tourism and the fear of racism in African-American traveler is a formidable task, but not unsurmountable, and South Carolina could become a role model in establishing a program to do so. Such a program could include small business training for African-Americans as they are considerably underrepresented in tourism-related businesses, especially in upper management positions. This was highlighted in the focus group discussions, with respondents suggesting that the benefits gained as a result of tourism development in South Carolina are not equally distributed across community members.

Training programs could be put in place that would encourage African-Americans to get involved in the development of tourism products and the entrepreneurial activities related to tourism and hospitality. Educational programming in high schools, community college and universities should be put in place to prepare future African-American entrepreneurs, programs that focus on tourism small business development and operations. Diversity training for those in the tourism and hospitality industry could also be part of this program. Tourism businesses and associations need to be encouraged to develop their knowledge of African-American customers and cultivate cultural competency in their workforce.

Another idea would be to use influential African-American residents as ambassadors. Dallas, Texas has seen success with a program called Big Influence, a celebration of big ideas and the diverse people in Dallas behind them. It features digital publications highlighting key influencers in the city, as well as a series of curated events designed to educate, engage and entertain both Dallas residents and visitors alike. The influencers serve as ambassadors, giving a voice to the city of success. For the inaugural launch, the program acknowledged some of Dallas' best and brightest African-American influencers. As Dallas' Chief Marketing Officer Noelle LeVeaux said: "The reach and authenticity of their voice is very important. Our campaign is the beginning of recognizing African-Americans in our town that help build the Dallas brand and make it the place that it is" (Wilson, 2014).

Finally, the need for African-American community collaboration and involvement was highlighted in the focus groups. Respondents referred to the many organizations working on African-American tourism in the state, but said there is no clear indication that they communicate well with each other and that they have a clear goal and message. There is a need therefore for increased cooperation between all groups in South Carolina catering to African-American tourists, or providing African-American cultural experiences. There is also the opportunity to collaborate with interested groups outside of South Carolina. Tours for example, could be developed along the major slave routes – from Western Africa, then via the notorious Middle Passage to the Caribbean where slaves were sold (and raw material purchased), and then on to South Carolina. During a State visit to Ghana in 2009, President Barack Obama made a visit with his family to Cape Coast Castle, a fortress used to confine slaves before they were shipped abroad. One of authors of this report made the same trip in 2016, and was astonished at the amount of African-American visitors from the US. Barbados is also seeing increasing interest for its Barbados Slave Route Heritage Trail and Tour. All these visitors to Ghana and the Caribbean would undoubtedly be interested in connecting the dots to visit all the key places on the old slave route – perhaps all in one signature trip.

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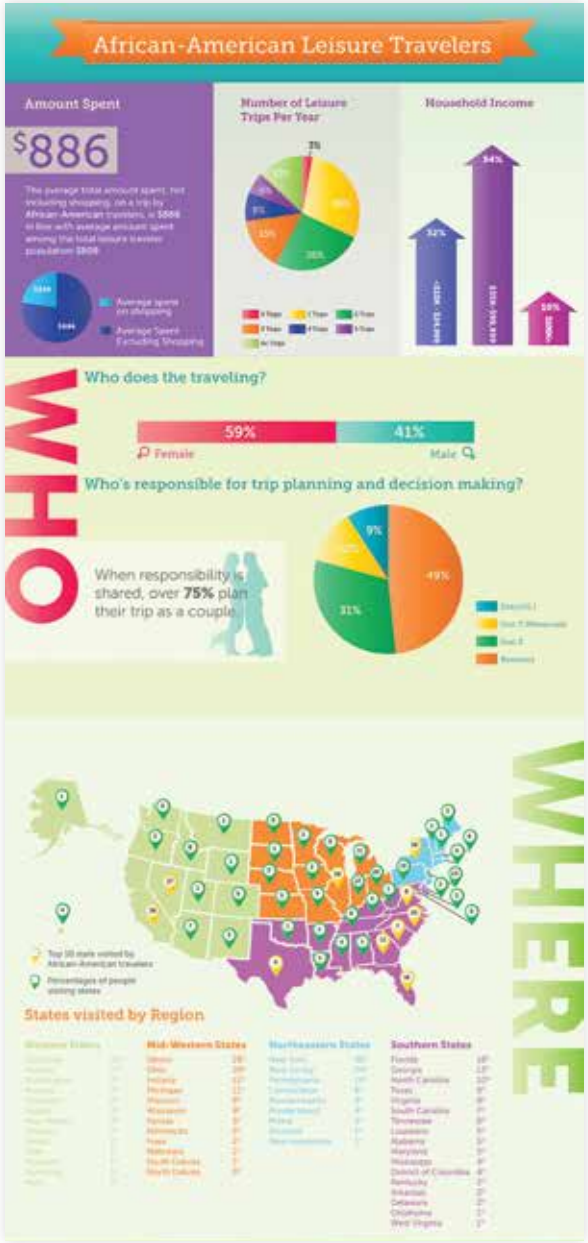
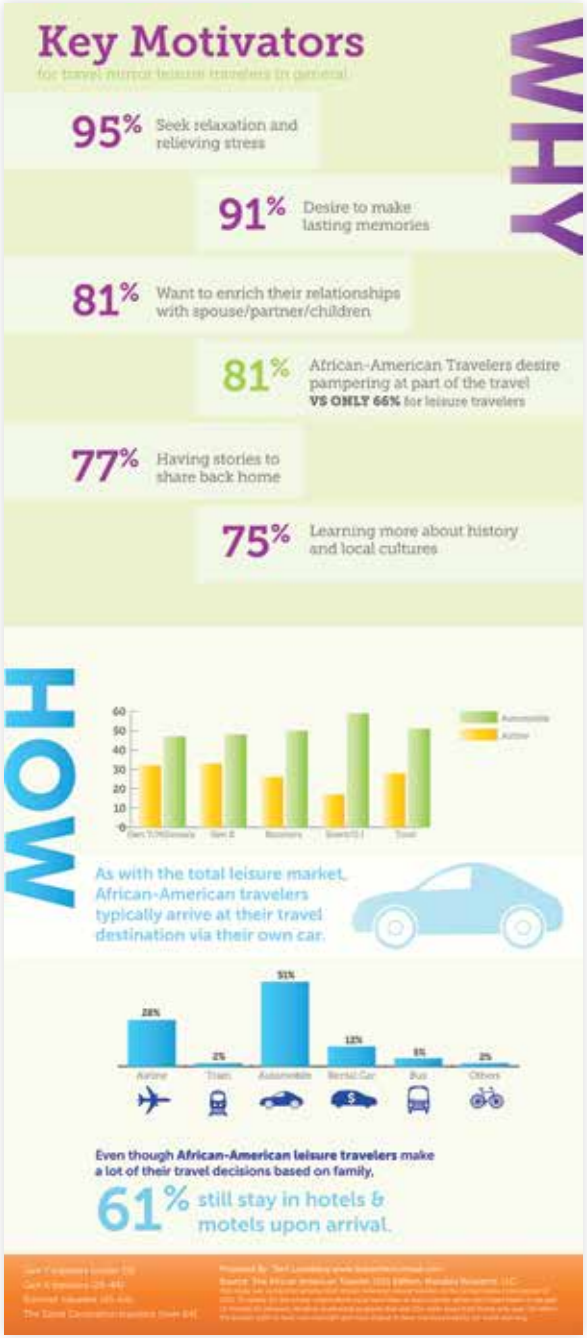
Appendix 1


African-American Leisure Travelers
Amount Spent
$886
Number of Leisure Trips Per Year
Household Income
WHO
Who does the traveling?
59%
41%
Female
Male
Who's responsible for trip planning and decision making?
When responsibility is shared, over 75% plan their trip as a couple
WHERE
States visited by Region

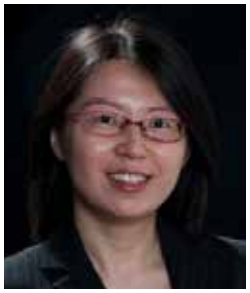
Accommodations
WHAT
African-American travelers participate more than the general leisure traveler in live performances and events, spa services, and personal enrichment.
More than 40%
Roughly one-third
Gen X travelers
take more weekend getaway trips, while only 5% take trips as part of a church organization.
Types of Trips
Taken in Last 12 Months
Top Activities


Key Motivators
WHY
95% Seek relaxation and relieving stress
91% Desire to make lasting memories
81% Want to enrich their relationships with spouse/partner/children
81% African-American Travelers desire pampering at part of the travel VS ONLY 66% for leisure travelers
77% Having stories to share back home
75% Learning more about history and local cultures
HOW
As with the total leisure market, African-American travelers typically arrive at their travel destination via their own car.
Even though African-American leisure travelers make a lot of their travel decisions based on family,
61% still stay in hotels & motels upon arrival.

Appendix 2

Project Team

SIMON HUDSON, PHD., MBA: Dr. Simon Hudson is the Director and Endowed Chair for the Center of Economic Excellence in Tourism and Economic Development at the University of South Carolina. He has held previous academic positions at the University of Calgary in Canada and the University of Brighton in England. He has also worked as a visiting professor in Austria, Switzerland, Spain, Fiji, New Zealand, and Australia. In all these countries, Dr. Hudson has worked on tourism planning and marketing exercises and numerous destinations around the world have benefited from his expertise and leadership skills. Prior to working in academia, he spent many years working in the tourism industry in Europe, so he brings practical experience to the table. Dr. Hudson has written eight books: Snow Business; Sport and Adventure Tourism; Marketing for Tourism and Hospitality: A Canadian Perspective; Tourism and Hospitality Marketing: A Global Perspective; Golf Tourism; Customer Service for Hospitality & Tourism; Winter Sport Tourism; and Marketing for Tourism, Hospitality & Events. The marketing of tourism is the focus of his research and in addition to the books he has written more than 60 peer-reviewed journal articles. Dr. Hudson is internationally known and respected as a leading expert and consultant in tourism research, and is frequently invited to tourism conferences as a keynote speaker. In fact, Dr. Hudson believes that the transfer from knowledge to industry is critical, and he places an emphasis therefore on dissemination. He produces well-written, cutting-edge reports from all of his work (see website below for more information), and he is always happy to present his findings face-to-face with industry stakeholders. For more information on Dr. Hudson's projects visit: http://www.hrsm.sc.edu/CoEETourismandED/default.shtml SC Tourism Center Blog



FANG MENG, PHD. DR. FANG MENG is a Research Associate in the SmartState Center of Economic Excellence in Tourism and Economic Development and an Associate Professor in the School of Hotel, Restaurant and Tourism Management at the University of South Carolina. Dr. Meng earned her Ph.D. degree in Hospitality and Tourism Management at Virginia Polytechnic Institute and State University. She was a faculty member at Ohio University prior to her work at the University of South Carolina. Dr. Meng's research mainly focuses on tourism destination marketing and management, tourist behavior/experience, and international tourism. She has a strong background on both quantitative and qualitative research methods and data analysis. Dr. Meng has about 80 scientific publications, including over 30 academic journal articles and book chapters. Her research work has been published in top-tier tourism, hospitality, and business journals such as the Journal of Travel Research, Tourism Management, Journal of Sustainable Tourism, and Tourism Analysis. She has received the Best Paper Award in International Council of Hospitality, Restaurant, and Institutional Education (I-CHRIE, 2007) and Travel and Tourism Research Association (TTRA, 2012). She currently serves on the editorial board of three academic journals and is a paper reviewer for over 15 academic journals. Dr. Meng has nearly 20 years of working and research experience in the tourism and hospitality industry, and has conducted extensive research in the areas of destination marketing, branding, destination competitiveness, tourism experience, quality of life, and international tourism and behavioral studies. She has completed a number of research projects through external and internal funding on both regional and international level. Dr. Meng serves in the Expert Committee of the World Tourism Cities Federation (WTCF), and is an active member in major tourism associations and a frequent speaker in national and international academic/industry conferences. Dr. Meng is bi-lingual in English and Chinese.

KEVIN KAM FUNG SO, PHD, POSTGRADDIP IN MATHSC (STAT), B.Bus (1st Hons): Dr. Kevin Kam Fung So is an Assistant Professor in the School of Hotel, Restaurant and Tourism Management and a Research Associate in the Center of Economic Excellence in Tourism and Economic Development at the University of South Carolina. He earned his PhD in Tourism and Hospitality Marketing from Griffith University, Australia, where he also obtained a Bachelor of Business in Hotel Management with First Class Honors. While completing his doctoral studies, Dr. So also pursued graduate studies in Mathematical Science and Statistics at Queensland University of Technology, Australia. His research interests focus on services marketing and management, with a special emphasis on customer engagement and service brand management in the tourism and hospitality industry. Dr. So has participated in a number of funded research projects with a total award of over $350,000. Many of these projects were funded by prestigious industry partners including the United States Department of Commerce, the South Carolina Department of Parks, Recreation & Tourism, the City of Columbia South Carolina, as well as peer institutions from the Australia, Hong Kong, and the United States.

His work has appeared in many top-tier academic journals including the Journal of Travel Research, Tourism Management, Journal of Hospitality & Tourism Research, and International Journal of Hospitality Management. Recognition of Dr. So's academic achievements includes the prestigious Griffith University Medal for his undergraduate studies; the Emerald Literati Network Awards for Excellence: Highly Commended Paper Award from the International Journal of Contemporary Hospitality Management; the Journal of Travel & Tourism Marketing Martin Oppermann Best Article of the Year Award 2013; the Journal of Hospitality & Tourism Research Article of the Year Award 2014; and three postgraduate scholarships for his doctoral studies. Dr. So's doctoral research, "An investigation of the role of customer engagement in strengthening service brand loyalty," was chosen as the winner of the 2014 Emerald/EFMD Outstanding Doctoral Research Award in the Hospitality Management category.

DAVID A. CÁRDENAS, PHD IS A RESEARCH ASSOCIATE in the SmartState Center of Economic Excellence in Tourism and Economic Development and an Assistant Professor at the University of South Carolina in the School of Hotel, Restaurant and Tourism Management. He received his Ph.D. in Recreation, Tourism and Parks Management from North Carolina State University. Prior to joining the faculty at the University of South Carolina, Dr. Cárdenas was a faculty member at the University of North Carolina Greensboro. Dr. Cárdenas has been a visiting professor in Shandong University in China and mostly recently in Curacao with the Inter-Continental University of the Caribbean. He has led a study abroad trip to Ecuador and helped facilitate educational trips to Ghana and Cuba. His research interests are in sustainable development, resident attitudes and tourism education. He has extensive experience working on community-based tourism planning projects in the United States and Ecuador, specifically working to engage and involve local residents in the sustainable tourism development process. His research has been published in the top-tier tourism and recreation journals such as the Journal of Sustainable Tourism, Tourism Analysis, Journal of Destinations Marketing, & Journal of Leisure Research, and Journal of Sport Management and presented his work at several regional, national and international conferences. In both 2008 and 2012, he received "Teacher of the Year" in his academic unit. In 2010 was inducted into Phi Beta Delta International Scholars Honor Society. Dr. Cardenas was born and raised in Quito, Ecuador and speaks English and Spanish.

OTHER SMARTSTATE CENTER CONTRIBUTORS

Madeline Broderick (Project Coordinator)
Pei Zhang (PhD Candidate)
Hengyun (Neil) Li (PhD Candidate)
Rui Qi (PhD Candidate)
Jing Li (PhD Candidate)
Bahman Ajdari (PhD Candidate)
Somang Min (PhD Candidate)
Daniel Morris (South Carolina Governor's School for Science & Mathematics)

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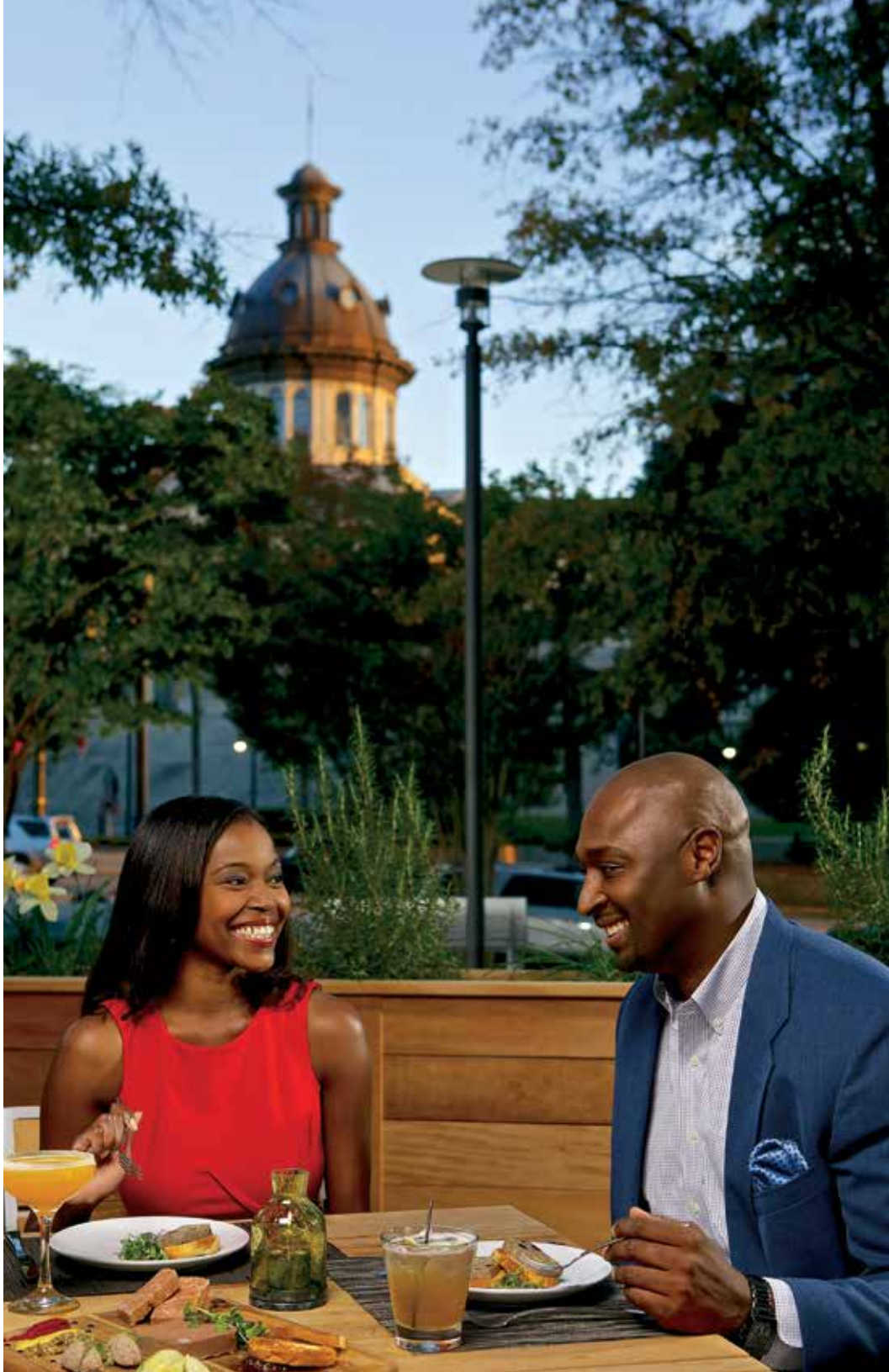
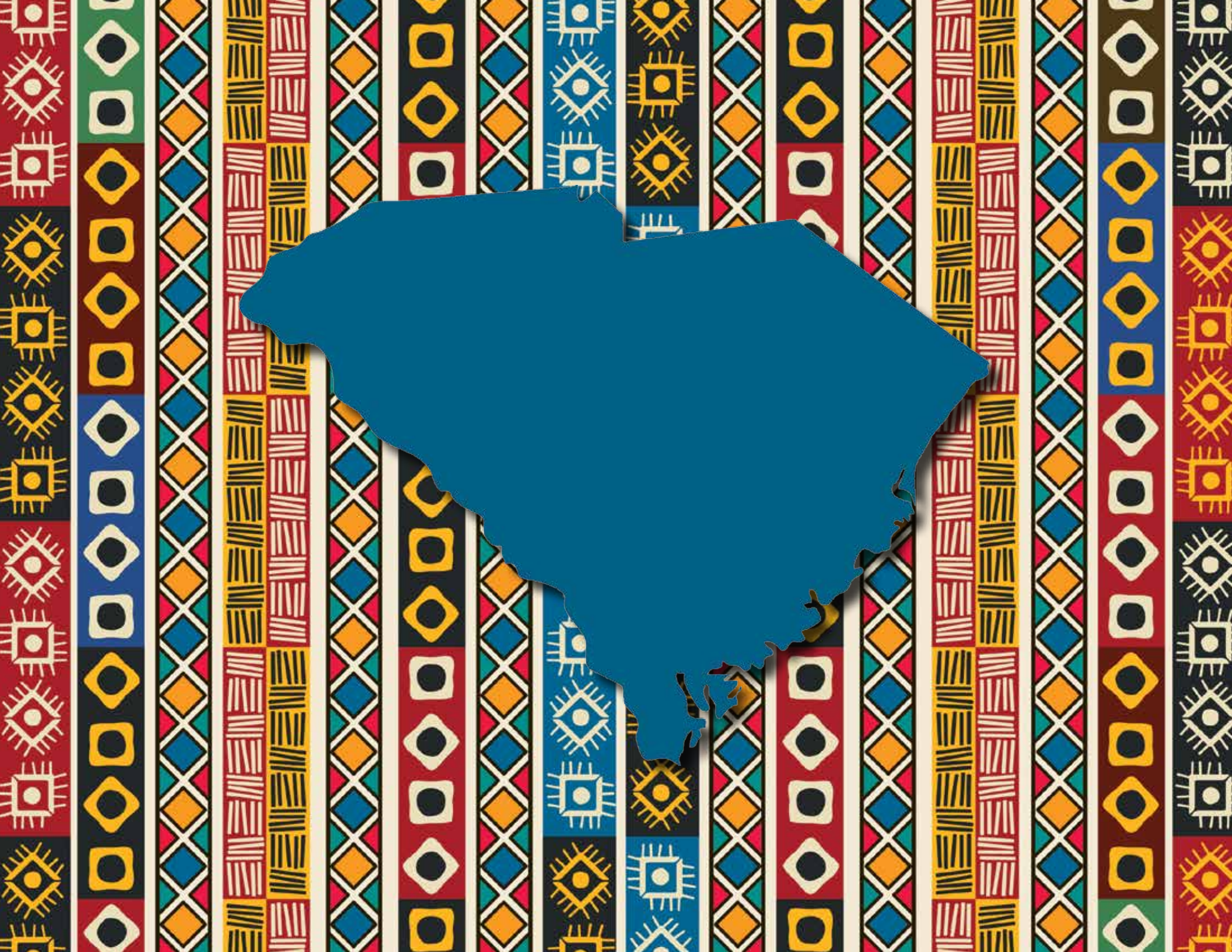
Hilton Head Island-Bluffton Chamber of Commerce
Columbia Metropolitan Convention & Visitors Bureau
Florence County Public Library
Greenville Cultural Exchange
Briana Mathews (Undergraduate Student USC)
Lauren Dzoba (Undergraduate Student USC)
Katie Dzoba (Undergraduate Student USC)





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