SANTEE COOPER
SOUTH CAROLINA

An Assessment of Tourism Development
Along the Santee Cooper Waterways
This study, conducted by the SmartState Center of Economic Excellence in Tourism and Economic Development at the University of South Carolina, included a content analysis of studies on waterway development and management, focus group sessions with area stakeholders, an economic impact analysis, and surveys of residents and current and potential visitors. Research team members also visited several waterways in the U.S. and Europe to make observations, interview key stakeholders, and obtain the most up-to-date information regarding tourism infrastructure and facilities on and around waterways.

Previous studies of waterway development in rural areas highlighted the need to involve community members in tourism development and management, and the need to maximize economic benefits through local ownership of tourist services and businesses. Studies also emphasized the need to provide a diverse range of tourist attractions and activities in addition to water-based activities. Successful blueway trails along rivers, lakes and canals are characterized by numerous public access points where paddlers can park and unload boats, quality camping sites, readily accessible information about trails and their facilities, and trail systems that are maintained and promoted by a designated local entity.

Site visit locations included the Erie Canalways National Heritage Corridor, Kennet & Avon Canal, England, the Grand Union Canal, England, canals around Nieuwpoort and Bruges in Belgium, and Saratoga Lake, New York State. Key take-homes from these visits include the fact that most of these waterway developments took many years to blossom, and have relied on public/private partnerships and a large amount of volunteerism. Many of these developments are breathing life into run-down and deprived communities, and seem to generate numerous social benefits for the local community. Trails alongside waterways are critical to attracting visitors, with activities on the water being paralleled by activities on shore – people are particularly attracted to cycling and walking paths alongside canals/ rivers, and eating and drinking in waterside cafes and bars.

Finally, the promotion of waterways to potential visitors is essential; events and festivals along waterways in particular, are important in attracting tourists and involving residents.

EXECUTIVE SUMMARY

Photo and cover photo by Jim Huff/Santee Cooper
An economic impact study was also conducted which took into account potential impacts for the Santee Cooper region. IMPLAN v3, an input-output economic model, was used to forecast the economic impact of water-based tourism. Five different scenarios were conducted to examine how increased water-based tourism would affect the region economically. At one end of the spectrum, if 1,000 additional water-based tourists visited the region it would create 19 new jobs, have a direct effect of $1,013,414, an indirect effect of $223,820, an induced effect of $207,430, with a total effect of $1,444,665 on the region. On the other hand, an increase of 20,000 visitors would create 380 new jobs, have a direct effect of $20,268,287, an indirect effect of $4,467,406, an induced effect of $4,148,610, with a total effect of $28,893,304 on the region.

The research team made a number of recommendations. Attracting investment for new infrastructure and product development will be paramount, and new tourism-related activities on the water should be developed alongside activities on land; people are particularly attracted to cycling and walking paths alongside waterways. Santee and Moncks Corner are well-positioned for new infrastructure, but any development should go hand-in-hand with careful consideration and planning with respect to protecting and preserving the natural resources of the waterways and the ecosystem of the surrounding region. Systems and programs should also be created to encourage, educate and empower community members in the development and the researchers recommend the establishment of a grassroots organization composed of local residents with diverse backgrounds and interests in water-based tourism development. Santee Cooper has a relatively weak brand, so a comprehensive branding exercise is recommended, followed by consistency in communicating the new brand identity to potential visitors, residents, and key stakeholders within the region. Finally, there is clearly a need for a comprehensive tourism/hospitality and customer service training program tailored to the Santee Cooper region. This would help frontline service providers, key leaders, and business owners in the area, and provide consistent representation and cohesive promotion of outdoor recreational tourism products.

Surveys, targeted at both current and potential tourists, as well as Santee Cooper residents, measured the interest and demand for tourism along the waterway and examined the attitudes for future tourism development among the key stakeholders in the region. Results indicate that current visitors have a more positive impression of the Santee Cooper region than potential visitors, but both groups are interested in water-based activities such as fishing, canoeing/paddle boating, motor boating, tubing and kayaking, as well as non-water-based activities including hiking/training trails, bicycling and camping in Santee Cooper. Residents reported similar interests in those activities. Potential visitors also reported an interest in restaurants and bars, local events, historic downtown areas, and national/state parks in Santee Cooper. When asked about river and lake cruises specifically, current Santee Cooper Public Service Authority residents are mostly interested in a river cruise from Charleston to Columbia, river/lake cruises of 2-3 hours, and a Cooper River cruise between Charleston and Lake Monticello. Possible barriers that may prohibit visitors’ participation in water-based activities are the water quality, weather conditions, navigational ability, and safety on the water. Potential visitors were more concerned than current visitors about issues related to non-water-based activities such as the safety and conditions of hiking trails, and quality and signage information of attractions.

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The four focus groups, conducted with a variety of stakeholders in Charleston, Moncks Corner, Santee and Columbia, highlighted an overwhelming sense of pride and appreciation for the natural beauty of the area, as well as a strong commitment to protect the natural resource base. Participants recognized the need for more tourism-related infrastructure and facilities in order to appeal to a broader spectrum of tourists, as well as the need to shore up support from key community stakeholders and residents alike. The need to educate residents and frontline employees about the critical importance of tourism was evident, and participants would like to see the Santee Cooper Public Service Authority embrace tourism development as a strategic objective. At the moment the organization is not perceived as tourism oriented or proactive in terms of tourism planning and development. Finally, participants stressed the need for a comprehensive marketing strategy to promote greater awareness of what the area has to offer.

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INTRODUCTION

In addition to a rich cultural heritage, South Carolina prides itself on an abundance of natural resources and nowhere is this more evident than in the Santee Cooper region of the state. Formally designated as a tourism district known as Santee Cooper Country, this region comprises the counties of Berkeley, Calhoun, Clarendon, Orangeburg and Sumter. Extending across these five counties and interlinked by the Diversion Canal are the man-made lakes: Marion and Moultrie. These lakes are seminal regional attractions and central features of the area’s natural and socio-economic landscape. Lake Moultrie, formed by damming the Cooper River, is in Berkeley County. Lake Marion is oriented northwest of Lake Moultrie and extends from Berkeley County along the border of Orangeburg, Calhoun, Sumter, and Clarendon counties. Lake Marion, formed by damming the Santee River, is the larger and more developed of the two lakes. In the rural counties that make up Santee Cooper Country, the hospitality and tourism industry lags well behind the more established coastal destinations within the state. In fiscal year 2013-14, fourth quarter accommodation taxes for the five Santee Cooper counties combined amounted to barely 1/8th of those generated in counties that include the popular tourist destinations of Charleston and Myrtle Beach.

“...identified Lakes Marion and Moultrie and adjacent rivers and canals as having significant tourism and recreational potential.”
While tourism is prominent in coastal areas, the potential for tourism development in this region between the Midlands and the coast of South Carolina is significant. Besides its renowned scenic beauty, Santee Cooper Country is well-situated along two major interstates. A popular route for drive tourists, Interstate 95 runs directly between the two lakes, funneling out-of-state motorists through the area in a north-south direction. Interstate 26 flanks the southern perimeter of the two lakes, running in an east-west direction and linking North Carolina via the state capital, Columbia, with Charleston at the coast.

Three key reports published in 2009, all of which the current study builds upon, have also consistently pointed to the potential for tourism development. A preliminary feasibility study was conducted by Environmental Resources Management (ERM) and provided a comprehensive assessment of property management strategies around the two lakes. In this report, ERM proposed redevelopment of landings at strategic points to encourage tourism and increase recreation in the area. Also released in 2009, a study by the US Department of Commerce highlighted cultural and heritage tourism opportunities as well as nature-based activities such as fishing, hunting, hiking, and golf that are already well-established in the area. Irish research firm Tourism Development International (TDI) similarly identified Lake Marion and Moultrie and adjacent rivers and canals as having significant tourism and recreational potential. At its most ambitious, TDI’s tourism proposal suggested infrastructure should be developed along navigable waterways to link Columbia in the north-west with Charleston at the coast, and tourism should be encouraged via blueways and boat tours as well as activities and attractions along the banks of the lakes and rivers. TDI also proposed off-water tourism be encouraged via hiking and biking trails, camping, and rural and heritage tourism such as seasonal festivals.
As mentioned, previous studies have identified significant potential for tourism development on the Santee Cooper Waterway that could deliver meaningful economic benefits to rural South Carolina. TDI in particular, recommended feasibility studies be conducted to measure the potential for such development. This study therefore builds on these recommendations by:
- Analyzing current and potential tourism attractions along the lower Santee Cooper Waterway
- Identifying products and services that have attracted tourists to similar waterways around the world
- Identifying the potential interest and demand for tourism along the Waterway

The project involved a multi-stage, mixed-methods approach to evaluate tourism development in the Santee Cooper region. These research methods included:
- Site visits, both nationally and internationally, of tourism operations along waterways
- A content analysis of research on rural tourism, waterways and waterway development and management
- An economic impact analysis.
- Focus group discussions with area stakeholders
- Surveys targeting area residents, current and potential visitors
Research team members visited several waterways in the U.S. and Europe in order to make observations, interview key stakeholders, and obtain the most up-to-date information regarding tourism infrastructure and facilities on and around waterways. Site visit locations included the following:
ERIE CANALWAYS NATIONAL HERITAGE CORRIDOR

The Erie Canal covers 524 miles, running from Albany, New York, to Buffalo, New York, and though the canal was once a significant option for transporting cargo, today it is used primarily for recreation. In 2000, the U.S. Congress designated the canal as the Erie Canalway National Heritage Corridor, and according to the New York State Canal Corporation, the canal system now generates $380 million a year in direct tourism spending.

KENNET & AVON CANAL, ENGLAND

The Kennet & Avon Canal in England is England’s most southerly cross-country canal and links London and the Bristol Channel. The 87-mile-long waterway attracts huge numbers of visitors each year, although it hasn’t always been such a popular place to visit. In the 1960s it fell into disrepair and wasn’t fully open to boats. It now owes its existence to the dedication of waterway enthusiasts and local people who formed the Kennet & Avon Canal Trust and helped to restore the canal to its former glory. In 1990 the Queen reopened the canal and it is now enjoying a renaissance.

THE GRAND UNION CANAL, ENGLAND

The Grand Union Canal meanders across the Midlands of England, and sweeps through the countryside of the South East. From Union Wharf Marina in Market Harborough, boaters can cruise for six miles on the Grand Union Canal, where they can then travel north towards Leicester or south through the Foxton Locks. Foxton has two staircases of locks, each with five locks to navigate.

CANALS AROUND NIEUWPOORT AND BRUGES IN BELGIUM

The two regions of Belgium, the flatland canals of Flanders along the English Channel and the hills & rivers of Wallonie in the south, are connected in a dense 1,600-km network of recently improved waterways. The team visited Nieuwpoort, just inland from the coast and ideally placed to take advantage of Western Belgium; and Bruges, dubbed the Venice of the North.

SARATOGA LAKE, NEW YORK STATE

Saratoga Lake is a freshwater lake in the eastern part of Saratoga County, New York. The lake is approximately 4.5 miles (7.2 km) long, about 1.5 miles (2.4 km) wide at its widest point, and about 95 feet (29 m) deep. The Lake is surrounded by the City of Saratoga Springs on the north west, the Town of Malta on the south west, the Town of Stillwater on the south east, and the Town of Saratoga on the north east. New York State Route 9P is a highway that runs along the southern end and eastern side of the lake, and then crosses its outlet in the north.

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Most of these waterway developments rely on public money and private partnerships. All of the waterways visited have taken many years to develop and many are still works in progress. What they have in common is that they rely on partnerships, particularly in terms of funding. In the UK, for example, The Kennet & Avon Canal Trust was instrumental in encouraging restoration process for the canal, carrying out projects as volunteers in the 1960s and 1970s. This led to major improvements in the 1980s that were funded and implemented by a partnership consisting of British Waterways, The Kennet & Avon Canal Trust, the Association of Canal Enterprises and local authorities. In 1997 development was given a boost by a $40m Heritage Lottery Fund grant, and the canal is now maintained and operated by the Canal & River Trust.

Volunteerism is critical to the survival of many of these waterways: Volunteerism also seems critical to the survival of many of these waterways. At the Grand Union Canal in England for example, educational volunteers for the Canal & River Explorers program are responsible for teaching children aged 7-11 about waterway heritage and wildlife throughout the country. Every spring, the New York State Canal Corporation and Parks & Trails New York host a weekend of volunteer events along the New York State Canal System, called Canal Clean Sweep. In 2014, the Canal Sweep had more than 150 community groups hosting 105 events, with an estimated 3,000 participants across the state. Volunteers donate their time to prepare the canal for the upcoming navigation season, and to ready the trails for summer use. Volunteers can also support the Canalway Trail through the Adopt-a-Trail program.

Individual initiatives along the waterways also reply on public/private partnerships.

A good example of successful public/private cooperation on an individual initiative comes from Saratoga Lake. In 2007, the only swimming spot on the lake – Brown’s Beach – was closed to the public. Developers initially wanted to build condominiums and when that fell through, there were talks of the development of a hotel and a resort. Six years later in 2013, with no signs of development in process, the beach was bought by the Town of Stillwater for $4.1m from the Saratoga Springs development company. A local restaurant and catering company (Panza’s) will be constructing and running a concession stand on the beach as well as renovating a vacant 100 year old restaurant on the property to be both a restaurant and a bed & breakfast. Menneto’s Powersports has been selected to operate the beach and marina providing up to 200 dock spaces. Such buy-in from communities and investors along waterways is crucial for success. In fact, for the last few years, Parks & Trails New York has been running a ‘Bicyclists Bring Business’ program to encourage communities along the waterways to become more attractive to trail-goers.

Brown’s Beach on Saratoga Lake

KEY FINDINGS
Canals and waterways are breathing life into run-down and deprived communities

Of course, many of these canals and waterways were not developed for leisure and recreation purposes, they now are attracting visitors, and breathing new life into former industrial communities that have fallen on hard times. The subsequent economic impact can be substantial. The Kennet & Avon Canal is a good case study because it has been subjected to extensive economic impact analysis over the years. In the period between 1995 and 2005 for example, over $600 million was invested in waterside developments, and British Waterways claim that this investment established considerable developer and investor confidence, especially in deprived areas. These canal-side sites helped enhance the vitality and vibrancy of the areas along the water, helping to create the market for leisure-related development.

One of the site visits included in the research was the city of Schenectady on the Mohawk River, part of the Erie Canalways National Heritage Corridor. Schenectady’s economy was hit particularly hard during the recent recession, but there are signs that a recovery is in progress, and this includes waterfront revitalization projects. For example, a real estate company, the Galesi Group, is just starting construction on a $150 million waterfront project at the former American Locomotive Co. site. Galesi received $5 million in state aid by way of a regional economic development award, and will be building a 124-room hotel and banquet center, 304 apartment units and a supermarket at the ALCO site. When complete it is envisaged that the site will be an economically vibrant waterfront lifestyle center with a balance of office, retail, and residential. In addition, the walkable community will offer public access to the waterfront through the use of a harbor, boat docking facilities, green space, and a direct link to the Mohawk Hudson Bike-Bike Trail.

The proposed waterfront project in Schenectady

Trails alongside waterways are critical to attracting visitors

Activities on the water are paralleled by activities on shore – people are attracted to cycling and walking paths alongside canals/rivers, and eating and drinking in waterside cafes and bars is very popular. On the Kennet & Avon Canal, over 60% of visitor spending is by non-boat users, highlighting the importance of on-land activities. Packaged, themed or organized trails seem quite common, and have a significant impact on the economies surrounding waterways. Visitor spending on the Erie Canalway Trail for example, generates approximately $253 million in sales, 3,440 jobs, $78 million in labor income and $28.5 million in taxes in the New York Upstate economy each year. The trail, which constitutes much of the towpath of the Erie Canal, is 277 miles long and is open as an off-road multi-use trail. While overnight visitors to the trail constitute only 18.25% of the total volume of visits, they generate 84% of overall spending. Self-guided tours include three ‘inn-to-inn’ touring trails for cyclists.
In Belgium too, the waterways are almost inextricably linked to cycling. Almost all of the canals have towpaths and these waterside routes offer some of the best cycling in the world. Of the country’s 2,000 km network of canals, approximately 1,600 km of towpath are open to cyclists. These towpaths are largely traffic-free and most pass through open country, and many are further connected by trails running along former railways. Both the Flemish and Walloon regional governments have actively improved towpaths and abandoned railway tracks for use by cyclists. In some cases where a towpath has been turned into a modern road, separate paths are built for cyclists.

Visitors prepare for a cruise in Bruges where canals are used solely for tourism.

Waterways can attract residential and industrial developments in addition to tourists. Once the infrastructure is in place (docks, restaurants, cafés, attractions), the waterways seem to be an attractive place to live and work. Brugge in Belgium for example has ‘The Canal Area’, a strategic development area offering space for “investment, innovation and ambitious projects in all fields: housing, business and offices, museums, hotels, shops, culture, and so on.” Union Wharf on the Grand Union Canal has a quality development of apartments and town houses, clustered around the terminus to the canal. The wharf also has a popular restaurant and bar and is a short walk from the town of Market Harborough, a traditional English market town that dates back to 1203. Waterways are also a valued resource and an important contributor to quality of life in surrounding communities. A report on the Erie Canalway trail for example, found that 97% of the visits to the trail are undertaken by persons living within the 35 countries surrounding the trail.

Events & festivals along waterways are important in attracting tourists and involving residents. Festivals and events are an increasingly important component of a destination’s attractiveness, and this is just as true for waterways. In 2014 for example, the Erie Canalway and the NYS Canal Corporation teamed up to sponsor 28 festivals and events. These included: Canal Clean Sweep Weekend in April when volunteers were invited to help with canal-wide cleanup and beautification projects; Our Ability a cross state bike ride from Buffalo to Albany in July along the Erie Canalway Trail to raise awareness for people with disabilities; Cycling the Erie Canal in July where more than 500 riders of all ages and from all over the country took an 8-day, 400-mile bike tour across New York State, organized by Parks and Trails New York; and Canal Splash! in August, a weekend of guided walks, bikes and cruises, museum and gallery exhibits, canoes and kayak paddles, canal-side festivals, and performances offered throughout the Corridor to celebrate the history, culture, and recreational appeal of the NYS Canal System.

Development around Union Wharf on the Grand Union Canal.

Most of these restoration schemes seem to generate numerous social benefits for the local community which might include a focus for special events and festivals, recreational opportunities, integration of recreation with the natural environment, enhanced recreational facilities for people with disabilities, opportunities for educational initiatives and health and fitness schemes, and community involvement in restoration and subsequent management.

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On the Kennet & Avon Canal, a range of events and festivals are held throughout the year at different locations along the canal, including for example, Newbury Waterways Festival, the Devizes to Westminster International Canoe Race, BBC Radio Wiltshire Week, and a Rambler’s Relay Walk. Boating pirate adventures around Newbury are also very popular. Previous studies have alluded to the positive social impacts of such events and festivals for local communities. For Canal Splash for example, all canal corridor communities, businesses, clubs, individuals, and non-profit organizations are invited to be part of the event and create their own events.

Promotion of waterways to potential visitors is critical

Some of the canals visited were more sophisticated than others in promoting their waterways. The Erie Canalway Preservation and Management Plan acknowledges that the corridor suffers from a lack of awareness of the canal system, its significance, and its value to potential visitors. The same can be said for many of the sites visited. Signage to waterways and associated attractions were often poor, with many still relying on traditional print media to get their message out to potential tourists. Websites also tend to be outdated and difficult to navigate. There are some exceptions. The Kennet & Avon Canal for example, has an impressive interactive holiday guide and map (see screenshot, whereby visitors to the site can click on a variety of activities or interests, such as hiring boats, or visiting hotels, pubs and castles (http://www.canaljunction.com/canal/kennet_avon.htm). For those interested in visiting pubs along the canal, brewery tours are also promoted such as the Wadworth Brewery tour.

For boaters cruising the canals in England, there is also an App called e-canalmapp, which is a collection of guides and maps of the waterways developed for ramblers and cyclists as well as boaters. The maps display thousands of continually updated points of interest (such as pubs, shops, moorings, etc.), as well as all the waterway information such as locks, bridges and turning points. An essential feature of the App is that it is off-line, so there is no interruption due to the poor Internet connection on the canals.
A comprehensive search of tourism studies on development projects with relevance to the Santee Cooper Region was conducted. Recommendations from these studies are summarized below.

Rural Tourism Development

Rural tourism is best implemented in a manner that is socially sustainable. This implies involving community members in tourism development and management as well as maximizing economic benefits through local ownership of tourist services and businesses. Furthermore, positive relationships between tourism industry stakeholders and local residents should be established and maintained, with special consideration given to those community members who do not benefit directly but nonetheless are impacted by tourism development.

Recommendations for building positive community relationships included encouraging residents’ participation in tourism related activities and events. This may entail ensuring locals are made to feel welcome at events or helping residents understand the benefits of tourism infrastructure for local residents.

Tourist information on events, for example, should also be directed toward and made easily accessible to local residents. Residents who participate in local events are also far more likely to spread positive word-of-mouth messages and serve as community ambassadors. Along with community pride, resident involvement also engenders social cohesion which is crucial to establishing and maintaining a strong and authentic regional identity.

Tourism infrastructure such as blueways and hiking trails also benefit area residents. Besides economic development and increased property values, trails increase recreational and educational opportunities, as well as quality of life through opportunities to exercise and engage in healthy outdoor activities. Tourism developers are encouraged to promote awareness of the value and benefits of trails as well as local involvement and use through identifying and eliminating obstacles to access and enjoyment by locals. Community involvement may include:

- Locals participating in planning and development of trails
- Staging public openings of new trails
- Forming a citizen’s advisory group to assist with ongoing maintenance
- Annual community clean-up efforts along trails
- Orchestrating events such as an annual race along trails

“...Rural tourism is best implemented in a manner that is socially sustainable.”
A number of studies have examined blueway trail development and management. These studies offer recommendations on establishing as well as managing blueway trail systems.

Established blueway trails along rivers, lakes and canals are characterized by:

- Public access points where paddlers can park and unload boats
- Boat launches at regular intervals to ensure sections may be paddled within a day
- Water access to overnight camping sites
- Readily accessible information about trail systems
- Trail systems that are maintained and promoted by a designated local entity

In terms of recommendations for the development of blueway trails, The North Carolina Paddle Trails Association (NCPTA) identified a range of issues to be addressed. With respect to stakeholders involved in blueway development and management directly, a need for coordination among government agencies, as well as communication with and coordination among tourism industry operators were highlighted. The need for more general representation among stakeholders and potential users was also highlighted.

The following guidelines for blueway trail development and management based on prior studies recommendations are as follows:

- Develop a centralized coordination among public and private stakeholders including a designated body or organization charged with development oversight
- Develop formalized agreements for blueway development and maintenance among public and private stakeholder
- Design a comprehensive plan that articulates the scope of development, and formalizes public and private stakeholder commitment, roles and responsibilities
- Engage legal counsel to establish jurisdictional and liability considerations along blueway trails
- Identify potential funders for land acquisition, visitor infrastructure and development and maintenance of blueway trail systems through local, state, federal, grant and private sources
- Collaborate with volunteer and non-profits groups in the development and management of blueway trails
- Develop systems to ensure sustainability of natural resources and environmental quality including water quality and adequate water levels, sustainable fish populations and health, disposal of visible garbage
- Design trails that take into consideration navigability, diverse interests among potential users, restroom availability, and personal safety both on the water and in the surrounding communities
Economic benefits from blueway trails

Recommendations for the capitalizing on economic benefits associated with blueway trails were also described in a 2007 economic impact study of the Northern Forest Canoe Trail (NFCT). According to the study, the NFCT, an extensive 740-mile trail spanning Quebec, Maine, Vermont, New Hampshire, and New York State, has brought substantial benefits to particular communities but not others. In general, communities closest to the NFCT waterways, and in particular those with most well-developed tourism infrastructure realized the most gains.

A number of recommendations for ensuring or maximizing local benefits were also suggested. Besides water-based activities, a diverse range of tourist attractions and activities may serve as primary and secondary reasons for visiting blueway trails, and tourism infrastructure adjacent to waterways should be planned and managed accordingly. Up to 30% of respondents in one study cited alternative reasons that included picnicking, relaxing, enjoying the river scenery, photographing, and watching wildlife.

Other recommendations include:

- Ensure sufficient lodging or camping sites along the full extent of a trail to increase use as well as attract additional users.
- Establish regional tourist gateways that offer additional recreational activities, visitor amenities and outfitter services to complement water-based activities.
- Develop training, certification, and marketing strategies for local tour guides aimed at generating direct and indirect economic revenue.
- Host multi-day water-based events such as races and festivals.
An economic impact study was also conducted as part of the current study and which took into account potential impacts for the Santee Cooper region (Sumter, Orangeburg, Calhoun, Clarendon, and Berkeley). IMPLAN v3, an input-output economic model, was used to forecast the economic impact of water-based tourism. Five different scenarios were conducted to examine how increased water-based tourism would affect the region economically. Data was collected by asking non-local water-based visitors about their expenditure patterns in 9 different categories (lodging, restaurants, grocery stores, transportation, access fees, guides/outfitters, retail, entertainment and other). Local resident expenditures were not included in the analysis.

### Table 1: Scenario 1, Increase of additional 1000 water-based tourist to the region

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<td>809,688.1</td>
<td>1,444,665.2</td>
</tr>
</tbody>
</table>

### Scenario 1. Increase of 1000 visitors (Table 1). If 1000 additional water-based tourists visited the region it would create 19 new jobs, have a direct effect of $1,013,414.50, indirect effect of $223,820.30, induced effect of $207,430.50 with a total effect of $1,444,665.20 on the region.

### Table 2: Scenario 2, Increase of additional 5000 water-based tourist to the region

<table>
<thead>
<tr>
<th>Impact Type</th>
<th>Employment</th>
<th>Labor Income</th>
<th>Total Value Added</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Effect</td>
<td>73.6</td>
<td>1,526,029.6</td>
<td>2,745,471.2</td>
<td>5,067,071.9</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>9.9</td>
<td>312,055.5</td>
<td>667,471.8</td>
<td>1,119,101.7</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>11.5</td>
<td>299,390.9</td>
<td>635,497.5</td>
<td>1,037,152.5</td>
</tr>
<tr>
<td>Total Effect</td>
<td>95.0</td>
<td>2,137,476.0</td>
<td>4,048,440.4</td>
<td>7,223,328.0</td>
</tr>
</tbody>
</table>

### Scenario 2. Increase of 5000 visitors (Table 2). If 5000 additional water-based tourists visited the region it would create 95 new jobs, have a direct effect of $5,067,071.90, indirect effect of $1,119,101.70, induced effect of $1,037,152.50 with a total effect of $7,223,328.00 on the region.
Table 3: Scenario 3, Increase of additional 10,000 water-based tourist to the region

<table>
<thead>
<tr>
<th>Impact Summary</th>
<th>Santee Cooper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact Type</td>
<td>Employment Income $</td>
</tr>
<tr>
<td>Direct Effect</td>
<td>147.1</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>19.9</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>23.0</td>
</tr>
<tr>
<td>Total Effect</td>
<td>219.0</td>
</tr>
</tbody>
</table>

Scenario 3. Increase of 10,000 visitors (Table 3). If 10,000 additional water-based tourists visited the region it would create 95 new jobs, have a direct effect of $10,134,143.80, indirect effect of $2,198,203.30, induced effect of $2,074,305.20 with a total effect of $14,446,652.30 on the region.

Table 4: Scenario 4, Increase of additional 15,000 water-based tourist to the region

<table>
<thead>
<tr>
<th>Impact Summary</th>
<th>Santee Cooper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact Type</td>
<td>Employment Income $</td>
</tr>
<tr>
<td>Direct Effect</td>
<td>220.7</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>29.8</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>34.6</td>
</tr>
<tr>
<td>Total Effect</td>
<td>285.0</td>
</tr>
</tbody>
</table>

Scenario 4. Increase of 15,000 visitors (Table 4). If 15,000 additional water-based tourists visited the region it would create 285 new jobs, have a direct effect of $15,201,215.70, indirect effect of $3,375,305.00, induced effect of $3,111,457.80 with a total effect of $21,669,978.50 on the region.

Table 5: Scenario 5, Increase of additional 20,000 water-based tourist to the region

<table>
<thead>
<tr>
<th>Impact Summary</th>
<th>Santee Cooper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact Type</td>
<td>Employment Income $</td>
</tr>
<tr>
<td>Direct Effect</td>
<td>294.2</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>39.7</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>46.1</td>
</tr>
<tr>
<td>Total Effect</td>
<td>380.0</td>
</tr>
</tbody>
</table>

Scenario 5. Increase of 20,000 visitors (Table 5). If 20,000 additional water-based tourists visited the region it would create 380 new jobs, have a direct effect of $20,268,287.60, indirect effect of $4,467,406.70, induced effect of $4,348,610.40 with a total effect of $28,893,304.70 on the region.

In 2013, SCPRT estimated that the travel expenditures for the region was over $365 million dollars and supported over 3,340 jobs (SCPRT 2013). Based on the fire scenarios above, even a minimal increase of a 1,000 non-local water-based visitors could have a substantial incremental economic impact on the region. This impact could be even greater if the region provided more local products and service (i.e. lodging, attractions, food & Beverage, tour guides). Much of the tourism infrastructure and services are provided outside of the region (i.e. Columbia, Charleston and Myrtle Beach).
Four focus group sessions were conducted in July 2014 at locations spanning the extent of a comprehensive waterway development plan as proposed by TDI, namely: Charleston, Moncks Corner, Santee, and Columbia. Participants included local business owners, representatives from state parks, natural resource and tourism agency organizations, area Convention and Visitor Bureaus (CVBs), town and city representatives, and conservation groups.

Participants were asked to describe Santee Cooper’s strengths and attractions as well as hurdles to tourism development. The impact of future development on area residents was also considered. Finally, sites with outstanding potential for development and regional examples of particularly well-executed or successful blueway trails and water-based tourism products were identified.

**Area strengths and attractions**

Focus group participants highlighted unique environmental attributes and the area’s scenic beauty as well as the “easy paced lifestyle”, “quiet charm”, and described the region as “being off the beaten path”. Lakes Marion and Moultrie were further identified as central features and a “wonderful resource” for locals and visitors alike.

“A phrase that I like to use a lot is that this is a wonderful resource that we all own and I enjoy sharing it with people.”

Participants noted the amazing natural resources unique to the region that can serve as the foundation for tourism development in the area.

“The Cypress Forest is out in the water... it's just a unique ecosystem and environment... I've never seen lakes like this.”

“We've got fresh water at our disposal. Some people love the salt, some don't. That's a resource we have that we can provide.”

Besides their aesthetic appeal, a noteworthy feature of the lakes is that they are not landlocked, offering outboard motorboat enthusiasts a rare opportunity to travel between...
Existing conditions

Despite the region’s notable natural strengths and attractions, focus group participants recognized the limited tourism products in the area. Hurdles to tourism development were also alluded to and included issues of lack of strong regional leadership, the need for basic infrastructure and tourist services and facilities development, and the ongoing need to provide quality management and maintenance to the towns and the lakes. And a comprehensive marketing and branding plan.

“...we have a lack of amenities. I mean you have to have stuff to draw people here. Having recreation is great, you know, it’s good but when people are done recreating, they need something else and… and Santee and this area lacks that. ”

“You’ve got areas that are economically stressed… If you are able to go in there and create infrastructure along that corridor you’ll find that you will probably be able to start to grow travel and tourism in that area. You will be able to attract visitors someplace. ”

In addition, existing socio-economic conditions and the need to educate residents and frontline employees was indicated.

“….I think the workforce makes it difficult to attract businesses coming here. ”

Local tourism product

While Lakes Marion and Moultrie clearly represent the area’s primary focal attraction, it was also clearly noted that the area is deficient in tourism amenities, development and product diversity around these resources. In order to encourage tourism, it was suggested that facilities and services appeal to a broader spectrum of tourists in terms of age, gender, group composition (e.g. hunters versus families), and interests.

“we see a change and a shift in the way people recreate… it’s just not like it used to be. So, you’ve got to find that niche – you’ve got to find that way people are recreating. And what they want - and what you need to provide for them.”

“You look at the lakes. There is very little development on them. That’s a great thing for sportsmen and fishermen, hunters, but not a great thing if you want to look at it as a recreation area. ”

“One of things that we lack is something that is more family oriented. This effects tourism from out of town coming in. This is really an issue locally. I am just a local guy around here and I can tell you that the struggle that. ”

Tourists’ needs and wants were described as poorly understood by investors and regional planners evidenced by the state’s interior and the inter-coastal waterways. Nature-based and outdoor recreational opportunities are also plentiful and include golf courses and golf co-ops, camping and birding. A roller race between Columbia and Charleston, The Palmetto 200, was also mentioned as a draw. Water-based activities include kayaking, sailing, outboard motor boating, swimming, and guided swamp and lake tours. Other sporting opportunities include “world class fishing” including an annual Bass fishing tournament in Manning, SC. Focus group participants also consider as the hunting conditions to be a natural asset to the region.

“…to use an old buzz phrase, this is a sportsman’s paradise. Hunting, fishing, outdoors, sporting activities, recreation…”

Participants also described the area’s historical and cultural significance, referencing fixtures such as plantation homes and long-standing local events such as harvest festivals. According to participants, there are numerous plantation homes and historic sites along the Cooper River and bordering Lake Marion.

“...there are still a lot of old plantation houses and historic things that are off of the main roads on all sides.”

Other significant cultural features include the Santos Indian Mound, a Revolutionary War fort, and Gullah Gecochee Cultural Heritage Corridor which traverses the region.

“It is the only known intact Revolutionary War fort in the United States built by the British. It is the only one. It was the site of a Francis Marion action. It was a very significant site and was up here and controlled the supply chain to the entire southern campaign.”

Furthermore, the construction of Lakes Marion and Moultrie are in themselves considered a significant component of the region’s story worth sharing with visitors.

“...I think the confidence makes it difficult to attract business coming here.”
the limited range of services and activities that cater to them specifically. Tourist accommodations, in particular, ranging from upmarket hotels and resorts to RV and primitive camp sites were recommended. A need for campsites that motor boaters and kayakers touring the waterways can use overnight was named as a specific need.

“I think one the missing pieces, especially on Lake Moultrie, is the lack of camping opportunities. We don’t have any designated, other than going out on boats and we do have some fish camps, but good primitive camping sites, we have zero. I think that would be a big asset for our county if we had that.”

“Making sure that there’s camping at strategic points, talking to the national park, as well as the Santee Cooper people, are there places that can be between 10-15 miles apart so that somebody can get out and camp if they want?”

Regional Leadership and Planning

Repeatedly, the respondents highlighted the need for strong and comprehensive regional leadership to drive development. In the absence of strong regional leadership for tourism development, development “silos” and marginal gains have been realized in some areas with a conspicuous lack of development in others.

Regional Leadership and Planning

Repeatedly, the respondents highlighted the need for strong and comprehensive regional leadership to drive development. In the absence of strong regional leadership for tourism development, development “silos” and marginal gains have been realized in some areas with a conspicuous lack of development in others.

“I think the marina would be a big asset for our county if we had that.”

Participants felt that without a unified strategy opportunities to bring visitors to the area may be lost. For instance, support may be needed from a diverse set of partners to develop tourism at the local level where tournaments and events, for example, that may also be beyond the capacity of individual or local municipalities to host.

“One of the things that is the fastest growing across this country is this adventure type runs, duathlons or triathlons, or whatever they may be, and they don’t have to be 200 miles long, they can have different distances, but I think there are so many sport areas, other than the traditional fishing, sailing or boating or some of these things that can be done on the lakes, that adventure type run, race, swim, whatever amazing race type things that you could do locally, I think there are some other additional things built along that area.”

In terms of leadership and tourism development on and alongside the lakes, the role of South Carolina Public Service Authority, informally known as Santee Cooper, was questioned. Participants felt that Santee Cooper has not yet embraced tourism development as a strategic objective, and the organization was not perceived as tourism oriented or proactive in terms of planning and development.

“So this regional leadership would benefit from working with the leadership of statewide initiatives, such as South Carolina Great Outdoors, to promote the region consistently with South Carolina’s marketing and branding efforts to maximize their messaging reach.

“We want to bring people in from international destinations and from other states to come to South Carolina and experience what we have. So a comprehensive approach or a comprehensive goal to how we could treat South Carolina, especially for connecting the waterways.”
Infrastructure, Water Access and Tourism Amenities

A lack of utilities, such as water and sewer lines, paved roads, and electricity in a number of areas was identified as a major impediment to development. The need for basic utilities and infrastructure to facilitate tourism development on lands held by Santee Cooper was also noted as insufficient or lacking. “…if they really want to generate tourism, if they really want to increase activity of that type then they have to help provide infrastructure and the amenities. They have to take the lead, and put the sewer in here and the water in there.

The limited public access to the rivers and lakes in terms of boat landings for both paddlers and outboard motor boat enthusiasts surfaced in the focus groups. A number of participants also recommended making boat launches handicap accessible. A lack of signage to identify put-in and take-out points, and a blueway trail system that is poorly marked, contributes to the impression of limited accessibility for outdoor recreationists.

“There’s no signage. So if you if you want to go kayak this whole thing, you need to know where you’re going and you need to know take-out, take-out, you need to know where you can do primitive camping, all these things. ”

Participants also voiced the need to develop basic amenities at put-in and take-out points such as restrooms, secure parking areas, and trash receptacles. Infrastructure and facilities around the two lakes are not uniformly distributed. Markedly less development around Lake Moultrie is attributed to protected areas adjoining the lake as well as an extensive dyke system that prohibits shoreline development.

“It doesn’t involve a large dyke compound like the lower lake also. But it’s a long linear lake and there are some more development opportunities up there. In certain areas, certain sides of the lake you have more of bottom land hardwood relicts situation where the amount of bluff that you could develop up to the lake is in certain areas but a lot of it is set back. So it’s a land pattern thing and geographic.”

Finally, a lack of development along the Congaree between Columbia and Lake Marion is a deterrent to operators who have considered developing tour boat routes along the river. Between Lake Moultrie and Charleston, along the Cooper River, tourism potential is also limited as there is “nothing to see,” or there are no places for recreational boaters to dock.

“you have to have the route, and then you have to have these places along the way. And then what will happen is that this becomes a link. The things will grow around it. You have the place to eat, the place to camp will grow around it. I think its route first and then the actual spots. Then all that stuff will grow from that.”

Land Ownership

Other tourism and tourism development considerations include land ownership, public access rite of ways, and land use provisions and zoning. The legal status of land under conservation easement, in public trust or privately owned, was highlighted by focus group participants as dictating to a large extent the scope of tourism activities and development around the lakes and along river banks. Along the Cooper River, many of the local plantation homes are reportedly privately held and access and liability are consequently considerations. Plantation estates, which are of both historical and cultural significance, have marked potential as area attractions, but there is reportedly little interest on the part of owners to grant public access. In some instances, however, it was suggested that access in may be negotiated on a case-by-case basis for private land as well as areas under protected status.

“There’s not one true plantation that’s open to the public. Unless we get a historical tour guide by our local people and they’re on schedule and that’s hard to sell that and I know the individual owners and they’re very private. Selective also.”
In this regard, Santee Cooper, which owns much of the land bordering the lakes, was described as pivotal where leasing agreements must be signed and development and maintenance issues addressed through them. Participants appeared somewhat skeptical of Santee Cooper’s motives.

“Are they (Santee Cooper) really the kind of people that are going to lead the way on this?… they do own it and you have to get permission to do certain things on the lake.”

National and state parks and forests, while attractions in their own right, also limit development. In other examples, lands under protected status may require special negotiations.

“…there’s Sullivan’s Landing. It is now owned by the heritage trust program with (The Department of Natural Resources) DNR. … the landing itself is in life estate by the Sullivan’s but will eventually be totally owned. When that happens, perhaps agreements can be made to develop that part. But heritage trust is a protection program not a development program.”

Management and Maintenance

The management and maintenance of area resources and the upkeep of local towns were cause for concern and described as potential hurdles to tourism development. Santee Cooper was once again implicated with respect to the management and maintenance of lakes and waterways in terms of who has the jurisdiction and resources to facilitate upkeep. Maintenance issues include the structural integrity of dykes, dredging channels for navigation, and keeping the lakes clean and clear of invasive species.

“…along the upper part of Lake Marion, you would probably have to have a couple of channels dredged through because you don’t want to be out there on a boat and get stuck. I know someone that got stuck out there and they were stuck out there for like a day and a half.”

Trees and tree stumps, remnants from forests that were flooded to create the lakes, are potential hazards for motorboats, and may also require removal. No officially designated group or comprehensive plan to maintain the area appears to be in place. To support and even generate more tourism, maintaining the quality of natural resources is likely to be an ongoing if not an escalating issue.

“This only thing I see and frankly this has already happened, is the overuse especially in the Lake Marion/ Moultrie area and some of the islands where you camp, to the rate in which these islands are maintained - it’s abysmal. With this it will get more use and if it’s not maintained and we cleaned up prior to it being run, then it will have a negative impact.”

In addition to natural resource management and maintenance, failure on the part of municipal stakeholders to properly maintain downtown areas has also negatively impacted the potential to attract tourists and tourism development. Abandoned buildings in main streets, for example, were described as creating the impression that areas are unsafe for visitors and unfeasible for potential investors.

“…the other thing, too, that does affect a town or an area like this is - places that have come and left. And now you’re left with abandoned buildings, some in poor condition, that even as a tourist, you come through and maybe a looks sketchy. Oh, I don’t know about this area? But you’re not going to stay here. Or if you are a business - you look at all these buildings.”

Community Education and Resident Attitudes

A noted lack of general lack of area knowledge/information on the part of small businesses and front-line employees who interact with the public was indicated. In addition, technical training to build a local work-force is also lacking. Insular attitudes with respect to development and a general suspicion of outsiders in some areas may also counter efforts to develop tourism in the region.

“…about 7 or 8 years ago, there was a proposal to ship barges up the cooper river to Lake Moultrie and offload them in Orangeburg County near Santee…there would have been jobs but nobody wanted...
to hear that so they abandon that plan. Sometimes you find that people along that stretch are a little parochial."

Opportunities and Recommendations

Flanked by Interstate 26 half-way between Charleston and Columbia, and intersected by interstate 95, the area was described as a prime location for attracting drive tourists. "There is tremendous potential….considering its proximity to Charleston and Columbia. I mean it’s practically dead center. It means there are tons of people who stop in Summerville in the summer time…They’re here. We just need a reason for them to stay …We have two million cars a year come up to our exits."

Product Development

In terms of tourism product development, building on existing areas and natural attractions was underscored. In addition, ideas generated during discussions centered on annual events such as races and triathlons, which are popular nationwide and attract a high volume of participants, as well as sport fishing competitions. "One of the things that will balloon over the years is Water Sport Week. It all has to do with water. People would come from all over to race from Columbia to Charleston. They really would. And pay crazy money to do it. Don’t ever lose our sports competitions."

Developing tourism that not only builds upon area strengths but offers complementary attractions such as hiking or health and wellness tourism, was also suggested. "You want to think about linking up with other events that are going on at festivals. But you don’t have to remake the wheel. It’s an additional part of the festival or event that focuses on the water."

Funding Sources

Identifying development grants and small business loans, as well as partnerships with stakeholders like the South Carolina Parks, Recreation and Tourism (SCPRT), Santee Cooper and private developers, were suggested as potential funding sources to support area tourism development. Funding sources that already contribute to local development include a State sponsored gas tax. Tapping other lucrative market segments within the state and securing grant funding, especially those that emphasize sustainable development practices, were also mentioned.

While some participants suggested that current state funding was both inadequate and not supportive of the Santee Cooper region, others suggested a comprehensive and expanded marketing strategy would best be implemented by The South Carolina Department of Parks, Recreation & Tourism (SCPRT).

"I think that funding of the promotion of it should come from state PRT. I think that they could find a little money to build a website, market it, promote it and get it out there."

Information and Marketing

A comprehensive regional plan that promotes a greater awareness of what the area has to offer and supports the strategic management goals and shared vision of the region was recommended. A plan to align area leadership on tourism development and implement a central or comprehensive marketing strategy was suggested by participants. Participants strongly recommended the development of a website, along with a social media campaign, to inspire a regional brand identity and to develop a strategic vision.

"If you have an appropriate website that really pops up when people do searches for paddling Charleston, paddling South Carolina, there is a whole regional area that it can cover from paddling here on the coast…all the way up to the national park near Columbia."

A final and related consideration was the need to encourage more positive media coverage of the area as a whole. "We have to get the media. We have to involve them on a personal level. It means going to the head of the TV studio, the owner of the newspaper. The problem is that a lot of the newspapers are owned by outside corporations, people that aren’t invested in community and they do canned news. There’s not as much local as there needs to be but if you can get a bunch of reporters in boat and..."
take them out and let them write about the fishing and the great food and the traveling through the swamps, and that sort of thing. It goes back to branding.”

Tourism Development

According to focus group participants, tourism development requires a “big picture” approach and requires designating a governing body to champion tourism development for the region as a whole. For a robust tourism product, focus group participants stressed product diversity over single or annual events. Year round economic viability of businesses, especially the local emphasis on outdoor recreation and seasonal attractions is in issue.

Participants highlighted the need to engage local business interests.

“Basically what you want to do is build something tourism-based around cash registers……All these places up and down the river and lake, you have marinas, restaurants, things like that, if they understood that here’s a bunch of new business that they wouldn’t have otherwise, you’re going to get their buy-in. If they don’t see that there’s any dollar upside for them, they’re going to be indifferent at best and maybe hostile. And the beautiful thing about something like this…..you are connecting the dots and it grows incrementally, and it just builds and picks up overtime.”

In developing area attractions, participants further stressed the need to take a realistic view of the time commitments and distances that visitors are willing to travel to reach them, as well as prices tourists may be willing to pay for area attractions. Activities that generate economic benefits but require less maintenance were also suggested as practical and more feasible in the long term.

“If you’re talking about Kayaking, trails and bird watching, and even the boat tours and things like that, the product which you see operates 24 hours per day and has no maintenance. It’s there. Basically what you’re providing is identification of it and access to it. So the folks who come spend their money at the local places, gas, water, lodging, and the least of other things that go along with it the costs to maintain many of the outdoor activities, they’re small. So it doesn’t take a whole lot of investment. But it puts the money into the jobs and the economy, but also the taxes collected help to offset some of the costs to local and state government.”

Recognizing and adjusting to changing recreational habits were also noted. The Santee State Park, for example, reportedly attracted weekend cabin stays over the summers, where now families will rent cabins for no more than a few days at a time.

“IT used to be real popular for swimming back in the day. And people used to just come out and picnic. And that has kind of gone away. You know, to see a change and a shift in the way people recreate.”

Focal Points for Development

Areas with existing infrastructure and visitor amenities were suggested focal points for initial development. “If I lived there I would start with Santee. That would be the perfect place to start on this side and then you’re get Summerton right across the lake. Santee has three golf courses; they now have a brand new water plant, actually operated by Santee Cooper, they’ve already begun distributing water into Calhoun County, parts of lower Orangeburg County and on their way over to Dorchester!”

Another suggested focal point for development included the southeast side of Lake Moultrie.

“I have a camp right at the canal and the lock, Short Stay, which is military and Department of Defense people. They rent, per annum, probably 250,000 people...
through there, that is strictly military and Department of Defense people. Next right adjacent to that is the new park they opened a few years ago, Overton Park. They are only utilizing a few acres there - there is a trail there between Overton park and my camp that’s over seventy, ninety acres."

"Regional and In-State Examples
Participants were asked to identify successful regional nature-based tourism operations as comparison examples of what the Santee Cooper region might emulate. Responses included the French Broad River, Roanoke River Partners, Asheville tubing, rafting and kayaking, the Appalachian Trail in North Carolina, the Chattooga River, GA, Fredericksburg, VA, and the C & O Canal in Washington, DC. Roanoke River Partners were reportedly successful in implementing a low-impact and integrative tourism development project:"

"It’s in North Carolina. It was a very impoverished area but it had the waterways along the Roanoke River. They have literally gone in and built camping platforms in the swamps, on the sides of the waterways. It also connects to very historical towns and they have done a tremendous job. It’s one of the biggest ones that I can think of locally, within a couple hours of us."

Off-water recreational opportunities including hiking trails were offered as examples of how development can be used to support local businesses. A staggered approach to this kind of development was also suggested:

"The tobacco trail in North Carolina, that was a 20 year plan and it certainly wasn’t done in a linear fashion. They focused where the low hanging fruit was, then focused here for a while, and here for a while, and here for a while. Then folks came saying why don’t we connect the whole thing?"

In-state examples of successful tourism development included Beaufort, the May River in Bluffton and Greenville, SC. Successful blueway trails were identified in the Spartanburg area, the Swamp Rabbit Trail in particular.

"Greenville…started with leadership deciding they needed a big hotel. The city get behind is a little bit and three or four powerful businessmen went up to Chicago, found this company that needed some tax credits and the next thing you know they got a big hotel. They say it’s a 25 year overnight success story. Started with a hotel, food and entertainment, low end food, and it just kept going. The city invested more, the private sector invested more and now it’s what it is."

Local Communities and Tourism Development
Respondents were asked to comment on potential positive and negative impacts of tourism development. Positive impacts associated with tourism development as suggested by focus group participants were chiefly economic and employment opportunities. Increased recreational opportunities and community pride were also described as indirect benefits.

"It would just be nice to have another place to go on a Saturday, another option. You know I have two small boys and it would be nice to just load them up and take them to the lake."

In terms of negative impacts, some participants had concerns over rapid change brought on by development.

"I think we would all fear that if it came too fast and ruined some of the uniqueness. …I’ve seen that some projects off in the past People want change but they don’t want it too much change. Where do you draw the line? What do you fight for? What do you fight against?"

A related consideration noted by several participants was the need to encourage development while maintaining the natural beauty and environmental integrity of the area. To this end, environmental protections such as conservation easements were described as essential rather than as hurdles to development. Conservation of natural resources includes the need to better manage fish stocks, particularly Striped Bass which, once plentiful, declined dramatically due to overexploitation and failure to monitor fish populations. Sustainable tourism infrastructure was also noted as key to the long-term environmental integrity of the area.

"I think (sustainable development) should be the focal point… I mean even the bathrooms could be compostable. Paddlers are used to packing it in, packing it out. Carry their own litter in other words."

Photo and cover photo by Jim Huff/Santee Cooper
Three survey studies were conducted to determine the potential and direction of tourism development and to understand the key considerations for area stakeholders. Intercept surveys were undertaken in a variety of locations to ensure responses were representative of the region as a whole. Data collection took place in the following towns and cities: Bowman, Charleston, Columbia, Harvin, Manning, Moncks Corner, Orangeburg, Santee, and St. Matthews, South Carolina.

The three studies conducted simultaneously included a survey of potential visitors (N=163) that explored interest in and potential demand for water and nature-based tourism in the Santee Cooper Region, overall perceptions of the region, and interest in visiting. A current visitors survey (N=98) likewise explored demand for water and nature-based attractions as well as overall impressions of the region. Survey respondents were asked to identify primary activities engaged in during the current visit, number of individuals in the travel party, length of stay, and choice of accommodations. Finally, current visitors were asked to rate tourist amenities and their overall image of the area.

A stakeholder survey (N=156) of area residents explored residents’ interest in water and nature-based recreational activities as well as local perceptions of the area. Residents were also asked about tourism in terms of potential impacts and perceptions of the strategic management of tourism development in the region.

DEMOGRAPHIC DATA AND COMPARISON AMONG RESPONDENT GROUPS (see Table 6)

Current visitor survey respondents were predominantly female (70%) and married (51%), rather than single (41%) or widowed, divorced or separated (8%). Age ranges of respondents included the single largest group of 21-40 years old (47%), followed by 41-60 years old (26%), 61 years and older (15%) and the smallest group, 20-year-olds and younger (12%). The majority of respondents reported holding a Bachelor’s degree (35%), followed by some college or an Associate degree (25%), a Master or Doctoral degree (15%), and a high school diploma or lower (15%). Among potential visitors, survey respondents were predominantly female (67%) and single (66%) rather than married (29%), or widowed, divorced or separated (6%). Age ranges of respondents included the single largest group of 21-40 years old (51%), followed by 20-year-olds and younger (25%), 41-60 years old (13%), 61 years and older (11%). The majority of respondents reported having some college or an Associate degree (43%), followed by a Bachelor’s degree (25%), a Master or Doctoral degree (18%), and a high school diploma or lower (12%).

Resident survey respondents were predominantly female (69%) and married (57%), rather than single (32%) or widowed, divorced or separated (12%). Age ranges of respondents included the single largest group of 21-40 years old (46%), followed by 41-60 years old (27%), 61 years and older (22%) and comprising the smallest group, 20-year-olds and younger (5%). The majority of respondents reported having some college or an Associate degree (35%), followed by a high school diploma or lower (27%), a Bachelor’s degree (27%), and finally a Master or Doctoral degree (16%).

<table>
<thead>
<tr>
<th>Survey group</th>
<th>Number of Completed Responses</th>
<th>Gender</th>
<th>Mean Age</th>
<th>Marital Status</th>
<th>Ethnicity</th>
<th>Education</th>
<th>Employment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Visitors</td>
<td>98</td>
<td>70% - Female</td>
<td>40</td>
<td>51% - Married</td>
<td>72% - Caucasian</td>
<td>52% - Bachelor's Degree of Higher</td>
<td>56% - Work Full Time</td>
</tr>
<tr>
<td>Potential Visitors</td>
<td>163</td>
<td>67% - Female</td>
<td>32</td>
<td>66% - Single</td>
<td>75% - Caucasian</td>
<td>63% - Bachelor's Degree of Higher</td>
<td>52% Work Full Time</td>
</tr>
<tr>
<td>Residents</td>
<td>156</td>
<td>65% - Female</td>
<td>44</td>
<td>57% - Married</td>
<td>54% - Caucasian</td>
<td>55% - Bachelor's Degree of Higher</td>
<td>65% Work Full Time</td>
</tr>
</tbody>
</table>
Respondents indicated the water-based and nature-based activities that they would be most likely to participate in. Both current visitors and residents rated recreational fishing the highest of the water-based activities, while potential visitors ranked fishing in the bottom three. Boardsailing/windsurfing was in the bottom three for all three stakeholder groups (see Table 7).

Current and potential visitors were also asked what might prohibit them from participating in water-based and nature-based activities in the region (see Tables 9 and 10). Water quality and weather were the top two concerns for both, while the item that least concerned the current visitors was fishing conditions and for potential visitors it was rural road conditions. Safety on and along trails was the top concern for both groups. The one area there was a major difference was lack of information. This was a concern for potential visitors, but not for current visitors.

Nature-based activities were very consistent between the three groups. Hiking/running trails were the highest rated nature-based activities for all three groups. Triathlon/adventure racing were the lowest for the current visitors and residents and second to last for potential visitors (see Table 8).

### Table 7: Highest and lowest ranked water-based activities among groups

<table>
<thead>
<tr>
<th>Survey group</th>
<th>Top Three</th>
<th>Bottom Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Visitors</td>
<td>Fishing (recreational), canoeing/paddling boat, and motor boating</td>
<td>Fishing (tournaments), boarding/windsurfing, and wakeboarding/waterskiing</td>
</tr>
<tr>
<td>Potential Visitors</td>
<td>Tubing, kayaking, and canoeing/paddling</td>
<td>Fishing (recreational), boarding/windsurfing, and wakeboarding/waterskiing</td>
</tr>
<tr>
<td>Residents</td>
<td>Fishing (recreational), canoeing/paddling boat, and motor boating</td>
<td>Sailing, boarding/windsurfing, and wakeboarding/waterskiing</td>
</tr>
</tbody>
</table>

### Table 8: Highest and lowest ranked nature-based activities among groups

<table>
<thead>
<tr>
<th>Survey group</th>
<th>Top Three</th>
<th>Bottom Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Visitors</td>
<td>Hiking/running trails, bicycling, and camping</td>
<td>Golf, hunting (recreational), and triathlon/adventure racing</td>
</tr>
<tr>
<td>Potential Visitors</td>
<td>Hiking/running trails, bicycling, and camping</td>
<td>Triathlon/adventure racing, golf, and hunting (recreational)</td>
</tr>
<tr>
<td>Residents</td>
<td>Hiking/running trails, bicycling, and sporting events</td>
<td>Hunting (recreational), golf, and triathlon/adventure racing</td>
</tr>
</tbody>
</table>

### Table 9: Items that would prohibit current and potential visitors from participating in water-based activities in the region

<table>
<thead>
<tr>
<th>Survey group</th>
<th>Top Three Concerns</th>
<th>Bottom Three Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Visitors</td>
<td>Water quality, weather conditions, and navigational ability</td>
<td>Fishing conditions, lack of skill, and inadequate signage</td>
</tr>
<tr>
<td>Potential Visitors</td>
<td>Weather conditions, water quality, and lack of equipment</td>
<td>Rural road conditions, lack of information about the lakes/streams, and fishing conditions</td>
</tr>
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</table>

### Table 10: Items that would prohibit current and potential visitors from participating in nature-based activities in the region

<table>
<thead>
<tr>
<th>Survey group</th>
<th>Top Three Concerns</th>
<th>Bottom Three Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Visitors</td>
<td>Water quality, weather conditions, and navigational ability</td>
<td>Fishing conditions, lack of skill, and inadequate signage</td>
</tr>
<tr>
<td>Potential Visitors</td>
<td>Weather conditions, water quality, and lack of equipment</td>
<td>Rural road conditions, lack of information about the lakes/streams, and fishing conditions</td>
</tr>
</tbody>
</table>
CURRENT VISITORS

Current visitors were defined as individuals from outside the Santee Cooper region (or Berkeley, Calhoun, Clarendon, Orangeburg and Sumter counties) who were staying over at least one night for recreational purposes. The majority of current visitors (60%) indicated that they had heard about the region from friends and family (see Figure 1). Most respondents (65%) have visited the region 1-3 times, while 14% said they have visited the area over 12 times in the last five years (see Figure 2). Twenty percent of visitors stayed less than a day, while over half stayed 1-3 days.

Table 11: Top three and bottom items current visitors used to describe the Santee Cooper Region (1-7 scale)

<table>
<thead>
<tr>
<th>Top Three</th>
<th>Bottom Three</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural scenic beauty - 5.66</td>
<td>Good night life – 3.65</td>
</tr>
<tr>
<td>Weather – 5.36</td>
<td>Many things to buy – 4.01</td>
</tr>
<tr>
<td>Quality of life – 5.10</td>
<td>Variety of restaurants – 4.09</td>
</tr>
</tbody>
</table>

Figure 1: Channels current visitor found out about the region

Figure 2: The number of time current visitors have visited the region in the last five years

Figure 3: Top motivators for travel to the region

Figure 4: Activities current visitors would participate in the region if offered

Table 11: Top three and bottom items current visitors used to describe the Santee Cooper Region (1-7 scale)

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Table 11: Top three and bottom items current visitors used to describe the Santee Cooper Region (1-7 scale)

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<tr>
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<td>Variety of restaurants – 4.09</td>
</tr>
</tbody>
</table>
Potential visitors (N=163) were defined as individuals who had not yet visited the Santee Cooper region but who were passing through the area (e.g., intercept surveys were conducted at rest stops along the I-95 corridor), visiting destinations in close proximity (e.g., surveys were collected in Charleston, a popular tourist haven), or live in close proximity to the area (e.g., data was also collected in Columbia, the largest and nearest urban area to the Santee Cooper region), and are thus the most likely tourist market and may become visitors in the future.

Potential visitors were asked about their impressions of the Santee Cooper region (see Table 12). Favorable impressions concerned the weather, natural scenic beauty, and quality of life. Least favorable impressions included the area’s nightlife, variety of restaurants, and choice of things to buy, in that order. Overall impressions of the Santee Cooper region were rated on a 7 point scale, with a mean score of 5.10 for potential visitors indicating that on average their impressions were somewhat favorable. Potential visitors were also asked to indicate what activities they would mostly likely participate in if they visited the region. The top items were 1) restaurants/bars, 2) local events, 3) historical sites, and 4) national/state parks (see Figure 5).

<table>
<thead>
<tr>
<th>Top Three (Mean)</th>
<th>Bottom Three (Mean)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weather – 4.81</td>
<td>Good night life – 4.00</td>
</tr>
<tr>
<td>Natural scenic beauty – 4.78</td>
<td>Variety of restaurants – 4.07</td>
</tr>
<tr>
<td>Quality of life – 4.60</td>
<td>Many things to buy – 3.52</td>
</tr>
</tbody>
</table>

Figure 5: Activities potential visitors would participate in if they visited

TABLE 12
Area residents were defined as individuals living in one of five counties that surround Lakes Marion and Moultrie (Berkeley, Calhoun, Clarendon, Orangeburg and Sumter counties). Residents were asked to provide their own impressions of the area, perceptions of the area as a tourism destination, as well as tourism impacts (both positive and negative), and the strategic management of tourism development.

Residents were asked about their impressions of the Santee Cooper region (Table 13). Favorable impressions concerned 1) natural scenic beauty, 2) weather, and 3) quality of life. Least favorable impressions included 1) roads, 2) transportation, and 3) the night-life. In addition, words used to describe the region with the highest mean scores included 1) comfortable, 2) attractive, and 3) pleasant. Residents on average also perceived the area as having a somewhat positive image to attract visitors (4.78 out of 7), that the area has been made to look appealing to attract visitors (4.73 out of 7), and that area stakeholders such as government agencies, public-private entities, or local businesses support tourism development overall.

Table 13: Top three impressions potential visitors had about the Santee Cooper Region (1-7 scale)

<table>
<thead>
<tr>
<th>Top Three (Mean)</th>
<th>Bottom Three (Mean)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural scenic beauty – 5.59</td>
<td>Roads – 4.38</td>
</tr>
<tr>
<td>Weather – 5.48</td>
<td>Transportation is convenient – 4.19</td>
</tr>
<tr>
<td>Quality of life – 5.23</td>
<td>Night life – 4.05</td>
</tr>
</tbody>
</table>

All results are presented on a seven-point scale. Overall, area residents reported moderate support for tourism development (4.42 out of 7). Area residents, on average, had a positive attitude toward the potential tourism development impacts on Santee Cooper region. They reported favorable impressions of tourism to generate revenue for local governments (5.67 out of 7), to expand opportunities for recreation (5.47 out of 7), and increase local employment opportunities (5.53 out of 7). Potential negative impacts included concerns over increased crime rates (3.76 out of 7) and traffic congestion (3.64 out of 7).

Included in the survey were questions regarding the role of electrical cooperative Santee Cooper in tourism development. Overall, 85% of residents reported that they trusted Santee Cooper with local tourism development. On a seven point scale and on average, residents also viewed Santee Cooper as 1) capable of performing their job (5.07 out of 7), 2) possessing great skills (5.07 out of 7), and 3) being well qualified (5.04 out of 7). However, residents were less likely to view Santee Cooper employees as 1) willing to go out of their way to help residents (4.58 out of 7), 2) being concerned with resident’s welfare (4.55 out of 7), or 3) having a strong sense of justice (4.53 out of 7).
RECOMMENDATIONS

Infrastructure and product development

To enhance tourism development, involvement from private and public entities needs to be encouraged to provide more tourism related infrastructure, facilities, and businesses, including hotels, bed and breakfast, restaurant, bars, river cruises ships, and many other water-based tourism attractions. There is clearly an interest in half-day river/lake cruises that might run between Charleston and Lake Moultrie, but the research also suggests that activities on the water should be parallelized by activities on shore, people are particularly interested in cycling and walking paths alongside waterways. Attracting investment to allow such development will be critical for the future of the region, and this can only be achieved through a unified and well-planned effort. The region’s brand will need to be strengthened to attract such investment, and this is discussed further below.

Based on data collected during the site visits, focus groups, literature review, and surveys, we recommend that development of infrastructure and main tourism/hospitality operating sectors be focused in two strategic areas, Santee and Moncks Corner. Santee is located on Lake Marion and has some established attractions, lodging and food and beverage services. Also located in the area is a Santee State Park and National Wildlife Refuge that if leveraged correctly could attract a significant amount of water-based tourism to the region. Development in Santee has yielded mixed results, which we have attributed to the economic downturn, poor planning and a lack of communication among and between developers.

However, we believe that with the existing development and geographical location, Santee is well positioned to attract water-based tourists. Although the lakes represent the area’s focal attraction, a lack of basic tourist amenities and product diversity was noted. Development in Santee should try to include more tourism infrastructure (e.g. camping sites and upscale hotels appeal) and services (e.g. restaurants and gas stations) as well as a broader spectrum of tourist attractions targeting a range of tourist age and gender groups, as well as group composition (e.g. hunters versus families). We also recommend establishing trails and paths between the lakes and operating sectors of area towns. Walking trails are widely popular and would encourage tourism flows between lakeside attractions and downtown areas.

In addition to Santee, we suggest that Moncks Corner, located on Lake Marion and the Highway 95 corridor and has some established attractions, lodging and food and beverage services. Also located in the area is a Moncks Corner already has established attractions, lodging and food and beverage services. However, infrastructure as well as area attractions are needed. Such development should also be well planned, with sufficient capital and a well-coordinated development and marketing strategy. Considering accessibility issues and water-based traffic, development is recommended for the Pinopolis Lock and the southern end of Lake Moultrie in particular. This would capture boaters already on the water as well as allow access from the highway. Specific areas identified as potential sites for tourism development are Atkins Landing and the area surrounding the Lock.

In addition to tourism and hospitality infrastructure development, it is critical that the region explores other economic development opportunities. Tourism alone will not fully revitalize the region and it is important that investment also be made to explore methods to attract new businesses as well as encourage new small business development in the region.

Sustainable development

Sustainability should be the corner stone for development in the region. Careful consideration and planning should be taken with respect to protecting and preserving the natural resources of the waterways and the ecosystem of the surrounding region. Nature, water and the pristine outdoors should remain as the main attractions for the region; however well planned development is needed to attract visitors to the region. The infrastructure development should be strategic, well researched, and with stringent environmental standards to ensure that the natural resources in the region can sustain tourism development in the long term. Special consideration should be taken in determining the location, structure type/function, height, and architectural design of the development to ensure the character and appeal of the region is maintained.

Whenever possible, local companies, local labor and local materials should be used in infrastructure development. Key stakeholders such as local residents, local business owners, government officials and regulatory agencies should be actively engaged and empowered in the development process. Systems should be established to monitor and evaluate key ecological functions of the waterway and the surrounding region. Specifically, special consideration should be taken to evaluate the wildlife habitat, morphological processes, nutrient cycles, sediment balance and hydrological balance.
Specialized education guidelines should be developed for local residents, developers, business owners, and visitors that will help all stakeholders enjoy and protect the waterways of Santee Cooper.

Community involvement

A concern of many of the local stakeholders during the focus groups was a lack of communication and collaboration between local residents and local officials/industries/agencies in the region. Systems and programs should be created to encourage, educate and empower community members in the tourism and economic development of Santee Cooper's waterways. A grassroots organization composed of local residents with diverse backgrounds and interests in water-based development should be established. This organization will be a conduit of information and will provide a voice for the community. In addition to a local organization, liaisons from industries/agencies primarily responsible for development and management of the waterways (such as Santee Cooper Public Service Authority) should be established to work on community relations and outreach. These liaisons should work closely with homeowners, educational institutions, non-profit agencies, the Department of Natural Resources, and hospitality organizations (just to name a few) by providing educational programming, workshops and information sessions. Another important task of the liaisons should be to communicate with the community and to be involved in community organizations. Public meetings should be conducted regularly to gather information and seek input and feedback. Lastly, multiple communication mediums (traditional newsletters, website and social media) need to be established to help educate and inform the community of development issues.

Branding

In an increasingly competitive global marketplace, the need for destinations to create a unique identity, to differentiate themselves from competitors, has become critical. Many places claim to have spectacular scenery, good quality of life, friendly people, and a sound business infrastructure. However, these factors are no longer differentiators, so places need a strong brand – or strong brand equity - to distinguish themselves in order to attract people to live, work and play. The research project suggests that Santee Cooper has a relatively weak brand, so a comprehensive branding exercise needs to be carried out in the region. Brand strategy should, however, more effectively be used as a tool of a broader economic development strategy, and should be built on a solid platform of research and planning, involving all community stakeholders. Once this branding exercise has been completed, consistency in communicating the new brand identity to potential visitors will be essential for ensuring the brand’s success in the long-term. It is recommended that stakeholders in the region collaborate on such destination marketing exercises with destination marketing organizations (DMOs) in and outside of South Carolina, as well as South Carolina Parks, Recreation and Tourism (SCPRT). In addition to external communications, marketers in the Santee Cooper region should also embark on an internal marketing campaign in order to raise awareness and strengthen the brand image amongst residents and other key stakeholders within the region.

Training

The competitiveness of a rural area in attracting tourists is based on its ability to deliver unique, superior, unforgettable and hassle-free experiences. Intangible services provided by local tourism providers are inevitable components of good tourism experiences. In this sense, personal can be recognized as the most important source of the competitive advantage or weakness of a destination. As the main interface with customers, staff in hotels and restaurants, employees in tourism organizations, and even the local residents present the image of a destination. Their skills and knowledge define the level of customer service. The results of this research suggest a need for a comprehensive tourism/hospitality and customer services training program tailored to the Santee Cooper region. This would help front line service providers, key leaders and business owners in the area provide a consistent representation and cohesive promotion of outdoor recreational tourism products. Such tourism/hospitality training would provide frontline workers with the tools needed to provide memorable and pleasant experiences to visitors to the area.
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