Demographics and Behavior of First Time Visitors to Charleston

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I was a First Time Visitor to Charleston Once...

In the summer of 2005...
A myth of first time visitors

- "The reason we come here is because we always come here, we are familiar with the place, this is where we come to relax."

- "The reason we are not going there is because we've been there, we've seen it, we've done [destination name]."

------Woodside, MacDonald (1994)
Content of the Talk

- Why do first time visitors matter?
- Who are first time visitors to Charleston?
- How much do first time visitors spend?
- What do they do in Charleston?
- What does Charleston experience mean to them?
- Conclusions
Why do First Timers matter?

“The law of repeat visitation states that once a market has exceeded the 50% Repeat Visitor ratio, decline is imminent, and an adjustment to new or other markets should be considered.” (Oppermann, 1998)
Butler (1980) Destination Life Cycle

- Discovery
- Development
- Maturity
- Decline
- Rejuvenation
Why do First Timers matter?

- It takes 5-6 times the cost to attract new visitors than convincing old ones.

- New visitors are, “a volatile, fickle, and expensive market to pursue, with no guarantee of success.” (Oppermann, 1998)
Repeat Visitor Ratio by Intercept Surveys
Where are they from?

- 73% of foreign visitors are first-timers versus 50% of domestic visitors
- International visitors increased from 6% to 9% from 2013 to 2014
Where are they from?

73% of foreign visitors are first-timers versus 50% of domestic visitors.
Where are they from? 73% of foreign visitors are first-timers versus 50% of domestic visitors.
# Top Metro areas?

<table>
<thead>
<tr>
<th>Rank</th>
<th>First Timers</th>
<th>Repeat Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New York</td>
<td>Charlotte</td>
</tr>
<tr>
<td>2</td>
<td>Chicago</td>
<td>New York</td>
</tr>
<tr>
<td>3</td>
<td>Boston</td>
<td>Boston</td>
</tr>
<tr>
<td>4</td>
<td>Atlanta</td>
<td>Greenville</td>
</tr>
<tr>
<td>5</td>
<td>Tampa</td>
<td>Hilton Head</td>
</tr>
<tr>
<td>6</td>
<td>Washington DC</td>
<td>Raleigh</td>
</tr>
<tr>
<td>7</td>
<td>Cincinnati</td>
<td>Washington DC</td>
</tr>
<tr>
<td>8</td>
<td>Dallas</td>
<td>Columbia, SC</td>
</tr>
<tr>
<td>9</td>
<td>Houston</td>
<td>Myrtle Beach</td>
</tr>
<tr>
<td>10</td>
<td>Miami</td>
<td>Atlanta</td>
</tr>
</tbody>
</table>
What are their transportation modes?

- **Personal Vehicle**: 80% for Repeat Visitors, 40% for First Timers
- **Airplane**: 20% for First Timers
- **Renta Vehicle**: 0% for both groups
- **Flew to Another City**: 0% for both groups
Demographics of first timers?

- 61% of first timers earned 75K as household incomes; 67% of repeat visitors did.
- Age, employment status, marital status, and educational level are not significantly different.
What is their behavior?

- Visitor Center visits: first timers (53%) versus repeat (36%)
- Median nights stayed: first timers (3 nights) versus repeat (4 nights)
- Areas visited: first timers (2.6 areas) versus repeat (2.1 areas)
Seasonality of visits?

First Timer
Repeat

MONTH IN 2014

PERCENTAGE
What are their accommodation types?

- Hotel: 40% (First Timer)
- B&B: 10% (First Timer)
- Camping: 10% (Repeat)
- Inn: 5% (Repeat)
- Resort: 15% (First Timer)
- Rental House: 20% (Repeat)
- Beach House: 15% (Repeat)
Accommodation locations?

- Downtown
- West of the Ashley
- North Charleston
- Mt. Pleasant
- Isle of Palms
- Kiawah Island

First Timer vs. Repeat
Enjoyed activities?

- First timers enjoy more history, tours, and children’s activities; repeat visitors value more beaches, shopping, restaurants, festivals and events.
- First timers visited 6 different attractions; repeat visitors had 5. Beaches are the only activity repeat visitors engaged more often.
Travel Planning Behavior?

- First timers were influenced more by CACVB websites, online travel reviews, and word-of-mouth.
- First timers plan their trips more carefully extensively, used 2.3 types of online resources (versus 1.6 for repeat visitors).
Trip planning behavior?

First timers: 2.3 tools; repeated, 1.6

- Charleston Area Guide: 30% First Timer, 20% Repeated
- Friend/Relative Suggestions & Recommendations: 40% First Timer, 30% Repeated
- Travel Book: 20% First Timer, 10% Repeated
- Travel Review Website: 30% First Timer, 20% Repeated
How much do they spend?

<table>
<thead>
<tr>
<th></th>
<th>Per Adult-Trip Local Spending</th>
<th>Per Adult-Trip on Tours</th>
</tr>
</thead>
<tbody>
<tr>
<td>First timer</td>
<td>$643</td>
<td>$53</td>
</tr>
<tr>
<td>Repeated</td>
<td>$906</td>
<td>$42</td>
</tr>
</tbody>
</table>
My husband and I have enjoyed Charleston since our first stay in 1988. We have returned many times and will continue to do so. We never tired of the carriage rides and the restaurants. The Inn we stay in is perfect and we stay there every time.

Always enjoy returning to Charleston---so beautiful and historic. I regret that the older historians are no longer around to lead the tours as the younger generation just does not really know the history. They have studied it, but it is not the same.
This is a great town. We cannot wait to return. We are celebrating our 30th anniversary here. Walked all over. It's like a super clean New Orleans, but better. Vendue Inn is wonderful and its staff is very helpful. Locals are all friendly and volunteered assistance with directions. What a great place. Stay classy, San Diego!
**Conclusions**

- First timers are explorers, more likely for sightseeing. They are more likely coming from long haul and flight market.
- Though they stay a shorter period and spent less, they visit more cities and more attractions, take more tours, and enjoy more history. Though they spent less and are more costly to attract, they are important to maintain the healthy balance of a destination.
Conclusions

- They are more likely to be influenced by word-of-mouth and CACVB websites. They plan their trips more extensively.
- First timers are especially important to attractions, tour companies, hotels and B&B in the City of Charleston.
- New flight destinations are crucial in attracting first time visitors.
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Questions?

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