

Tourism Advisory Committee

May 16, 2017

2nd Floor Media Room
City Hall

Agenda

- Chair's Report Vaughnette Goode-Walker, Chair
- 2016 Longwoods Study Joe Marinelli, Visit Savannah
- Tourism Management Plan Staff
- Ordinance Revisions Staff
 - Horse Drawn Carriage Ordinance
 - Quadricycle Ordinance
- Tourism Services Economic Study Staff
- Motor Coach Parking Report Staff
- Other Business Chair Goode-Walker



Longwoods
Travel USA®

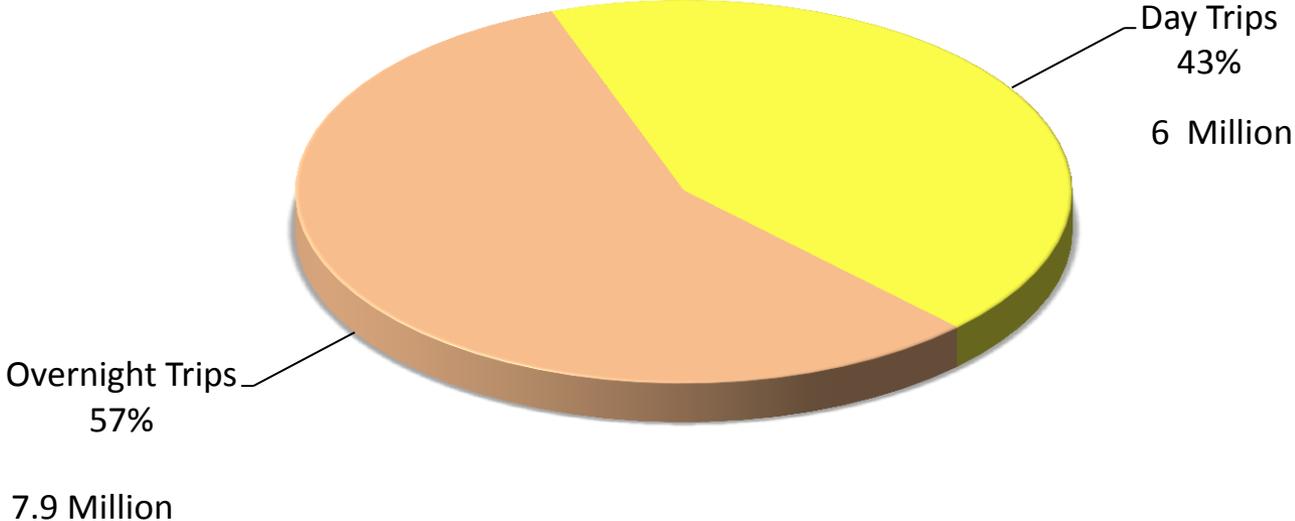
Savannah

2016 Visitor Study

Total Size of the Savannah Travel Market in 2016

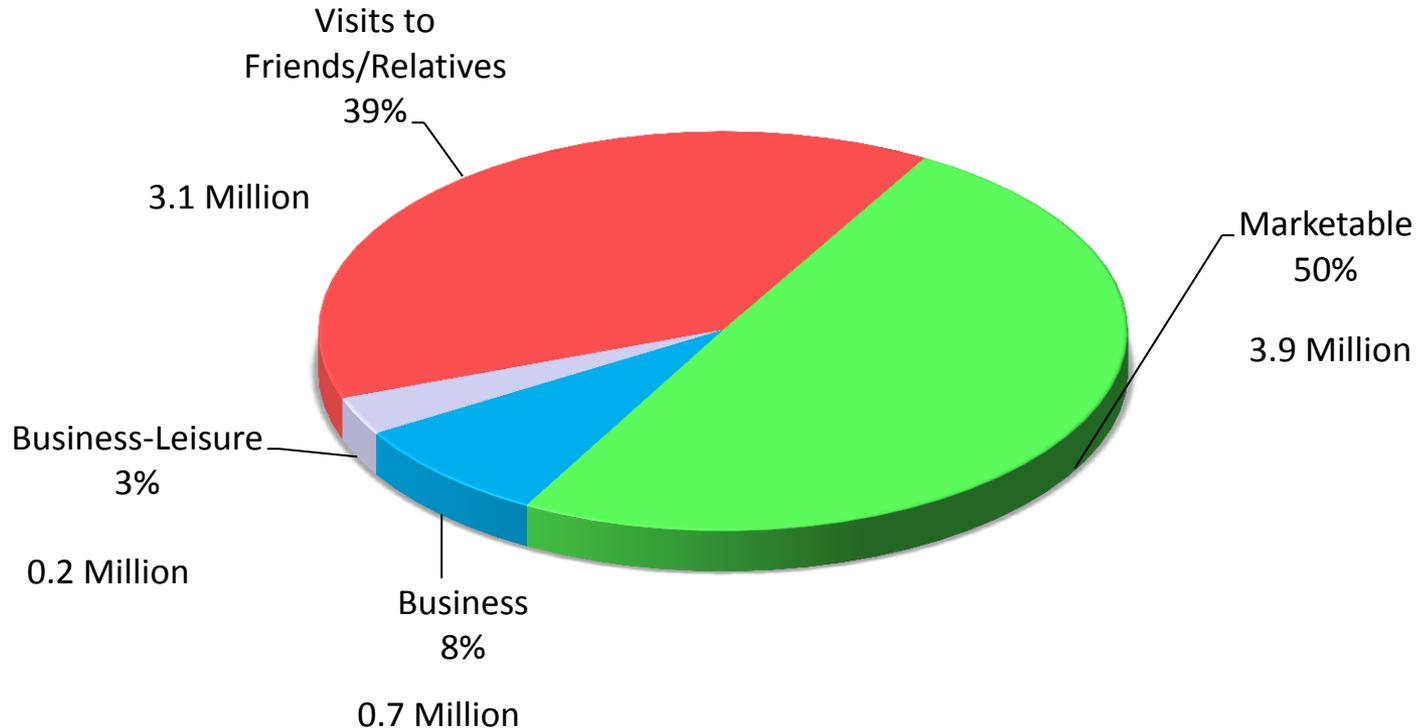
Adult Person-Trips = 13.9 Million

+1.4% vs. 2015



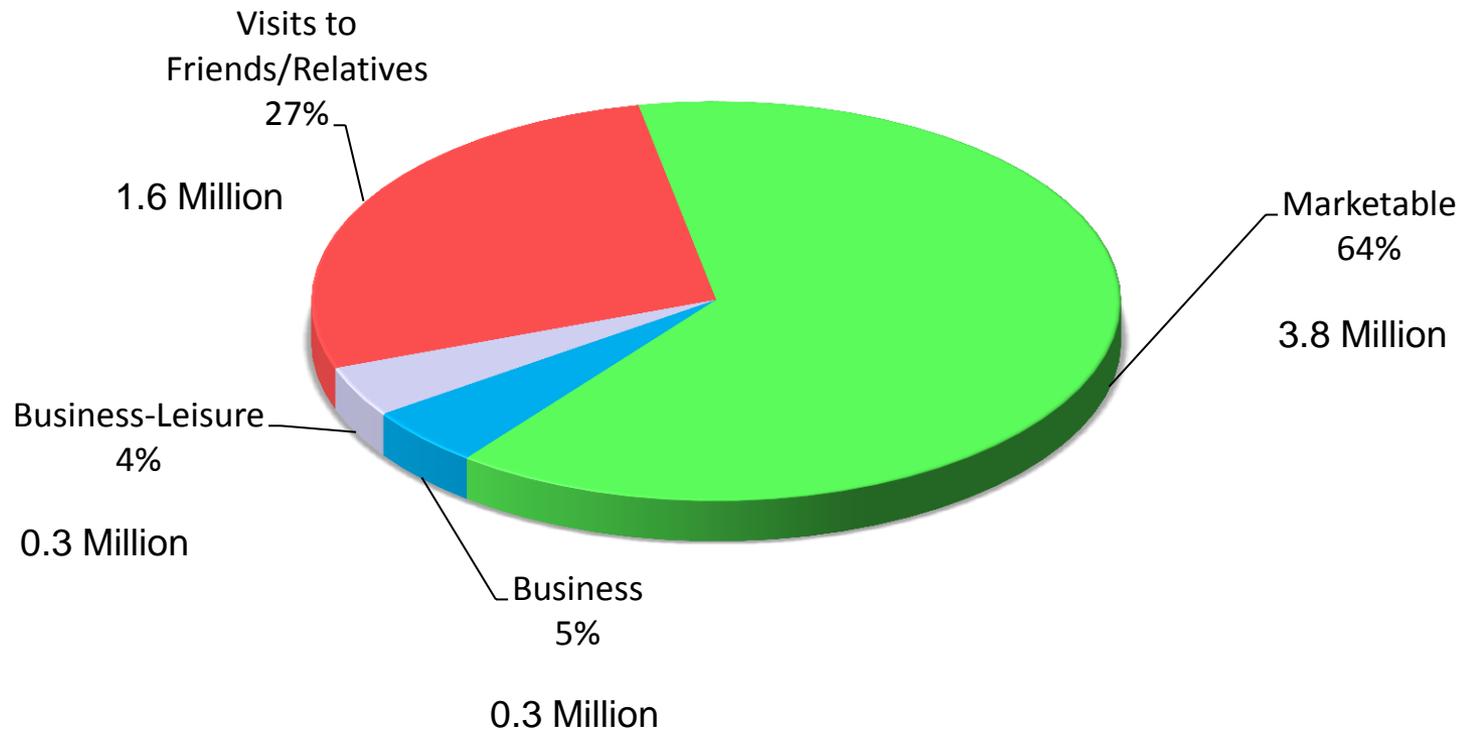
Savannah's Overnight Travel Market — by Trip Purpose

Adult Overnight Person-Trips = 7.9 Million

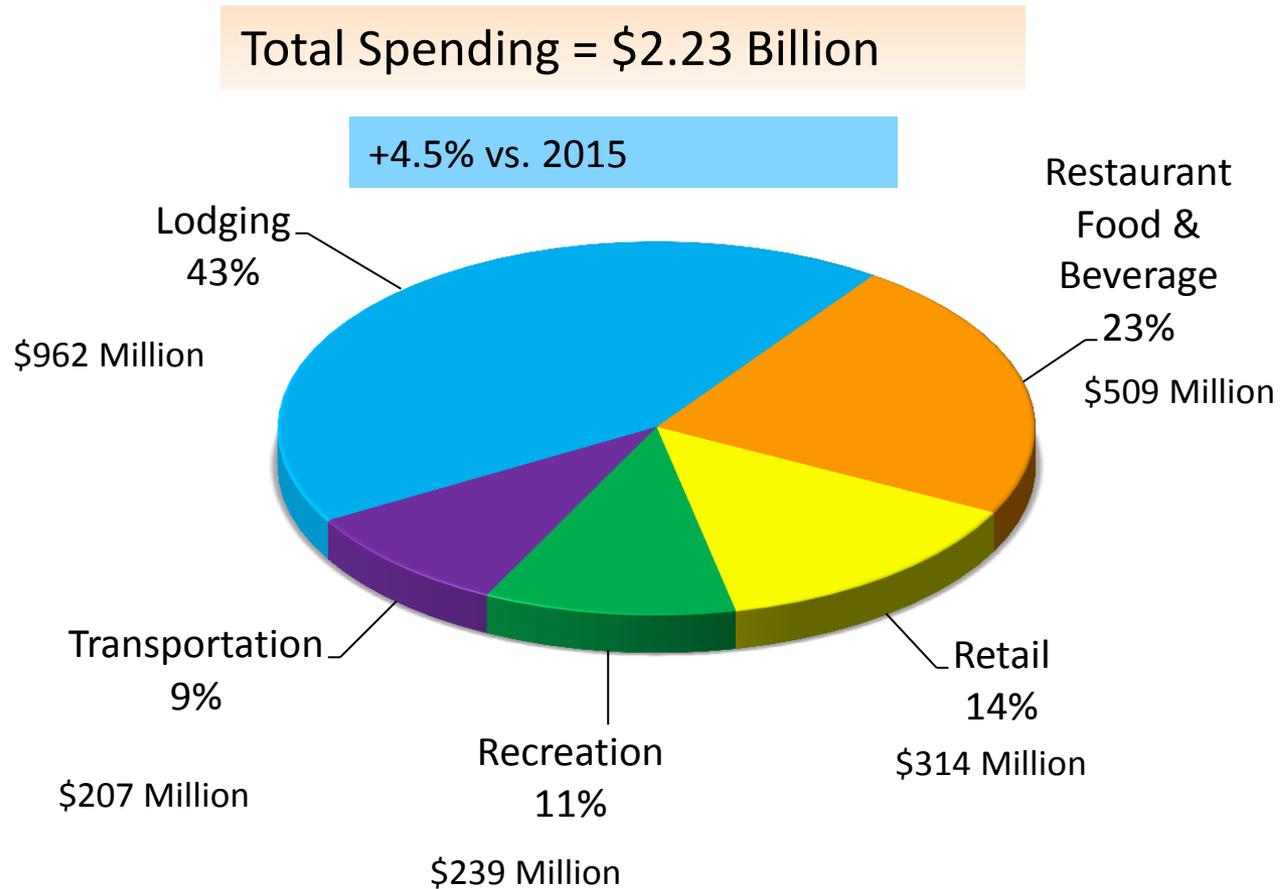


Savannah's Day Travel Market — by Trip Purpose

Adult Day Person-Trips = 6 Million

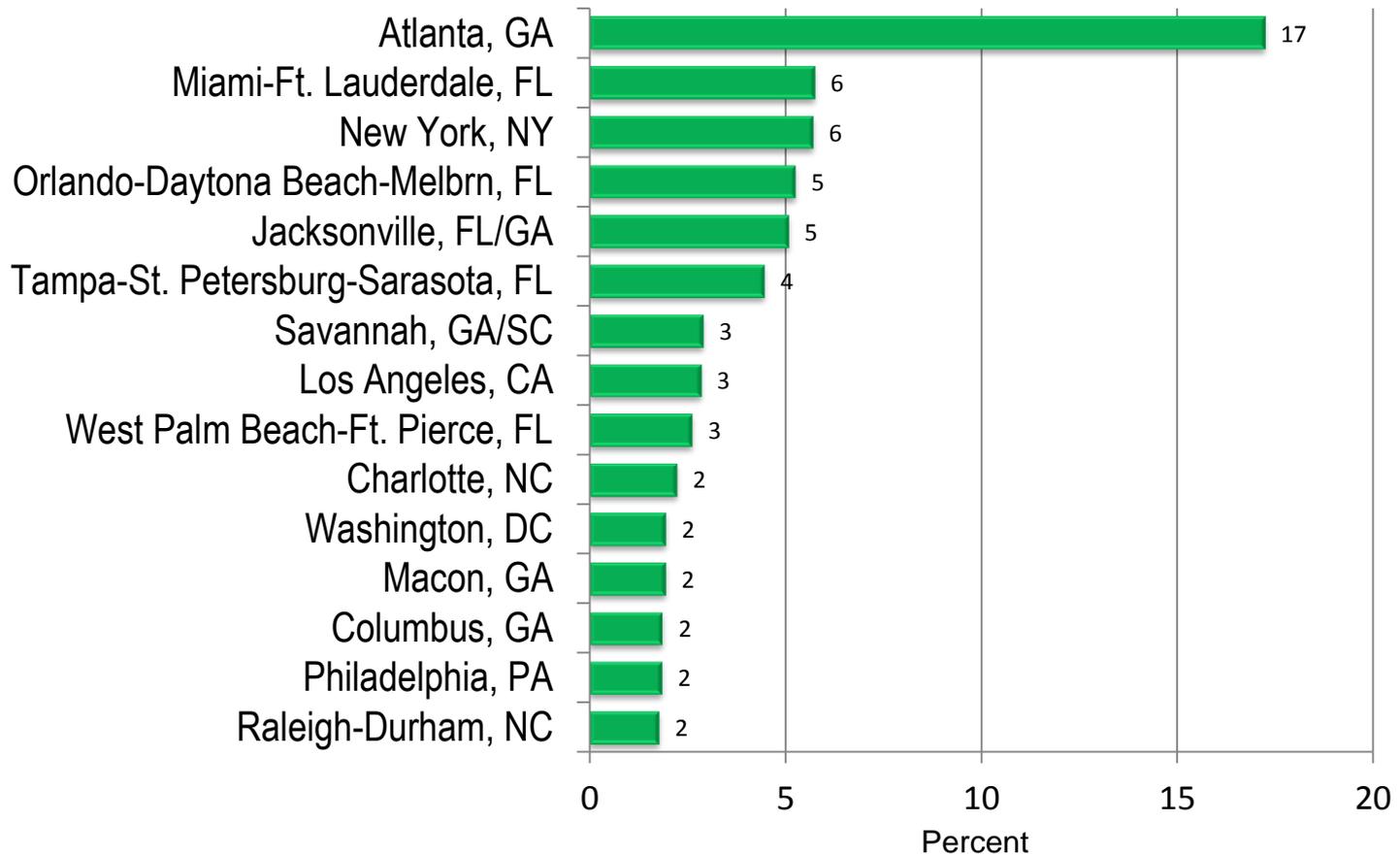


Total Overnight Spending — by Sector



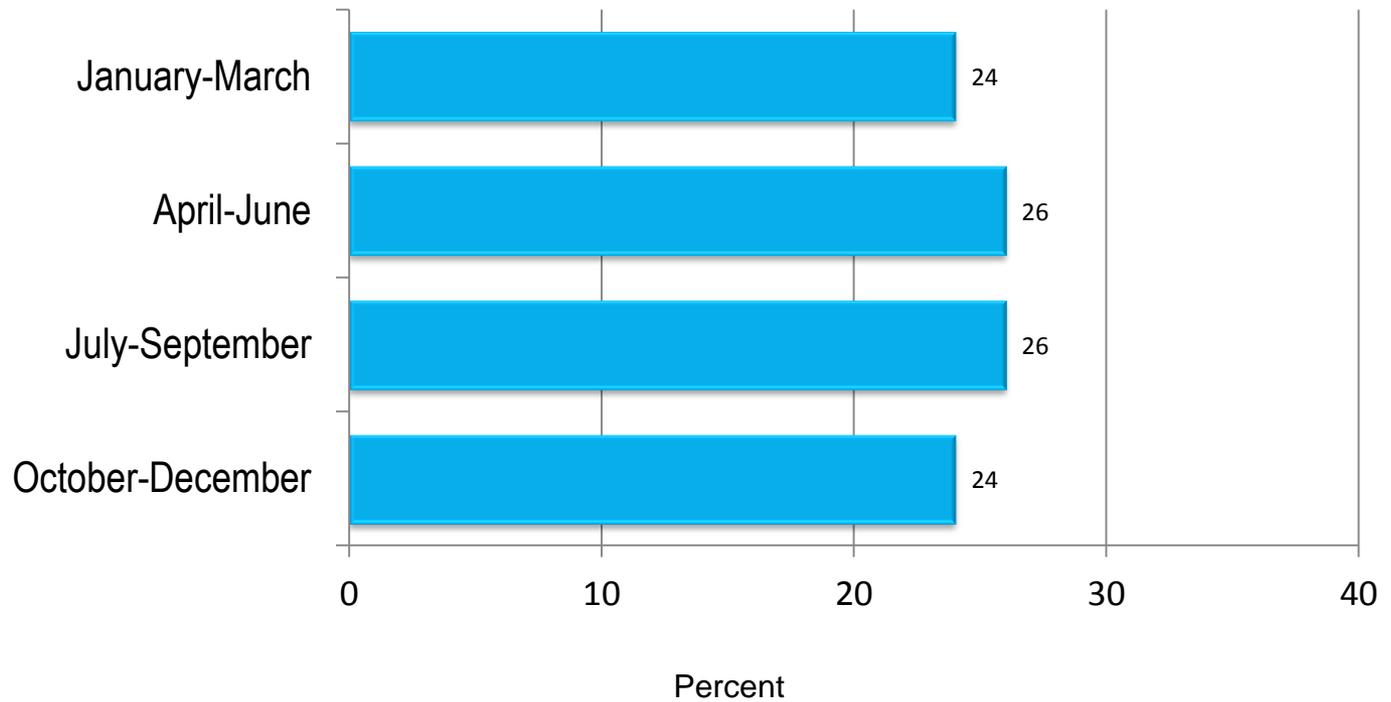
DMA Origin Of Trip

Base: Total Overnight Person-Trips to Savannah



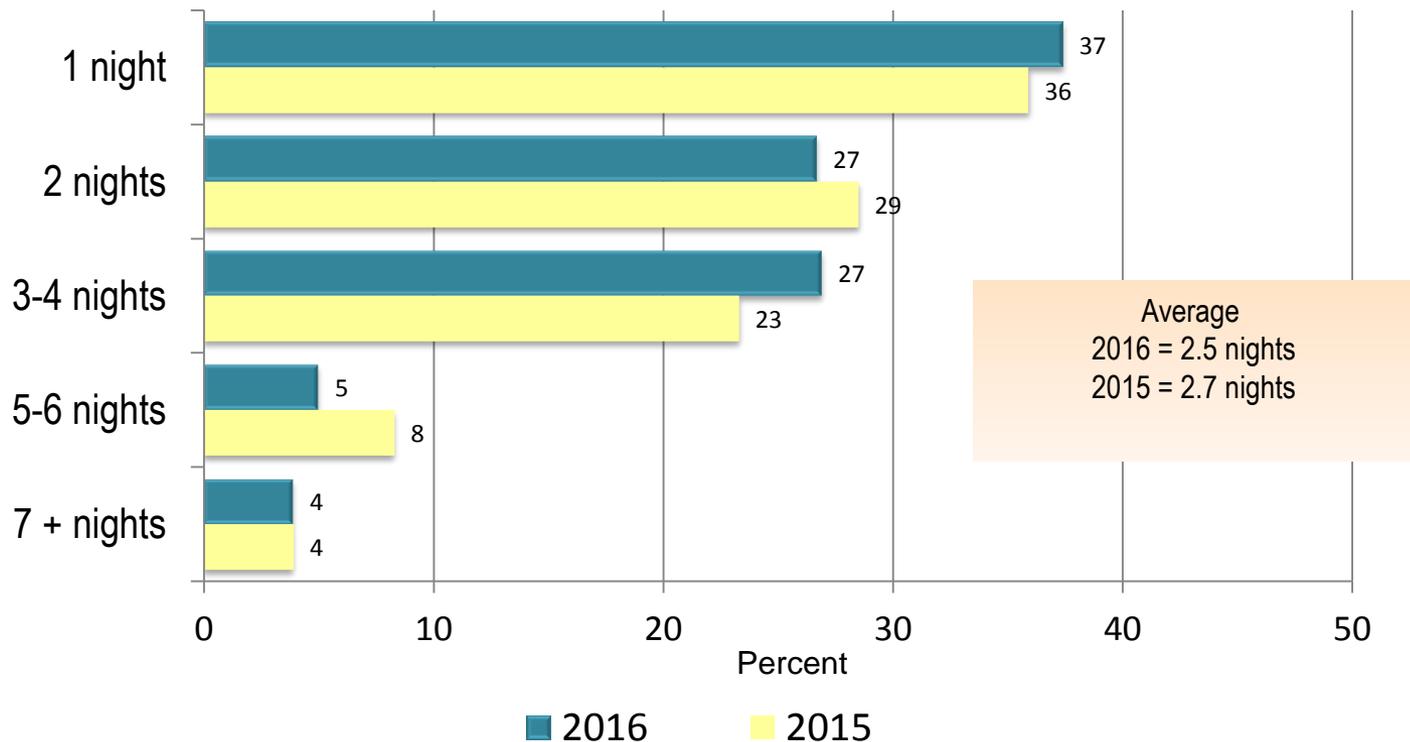
Season of Trip

Base: Total Overnight Person-Trips to Savannah



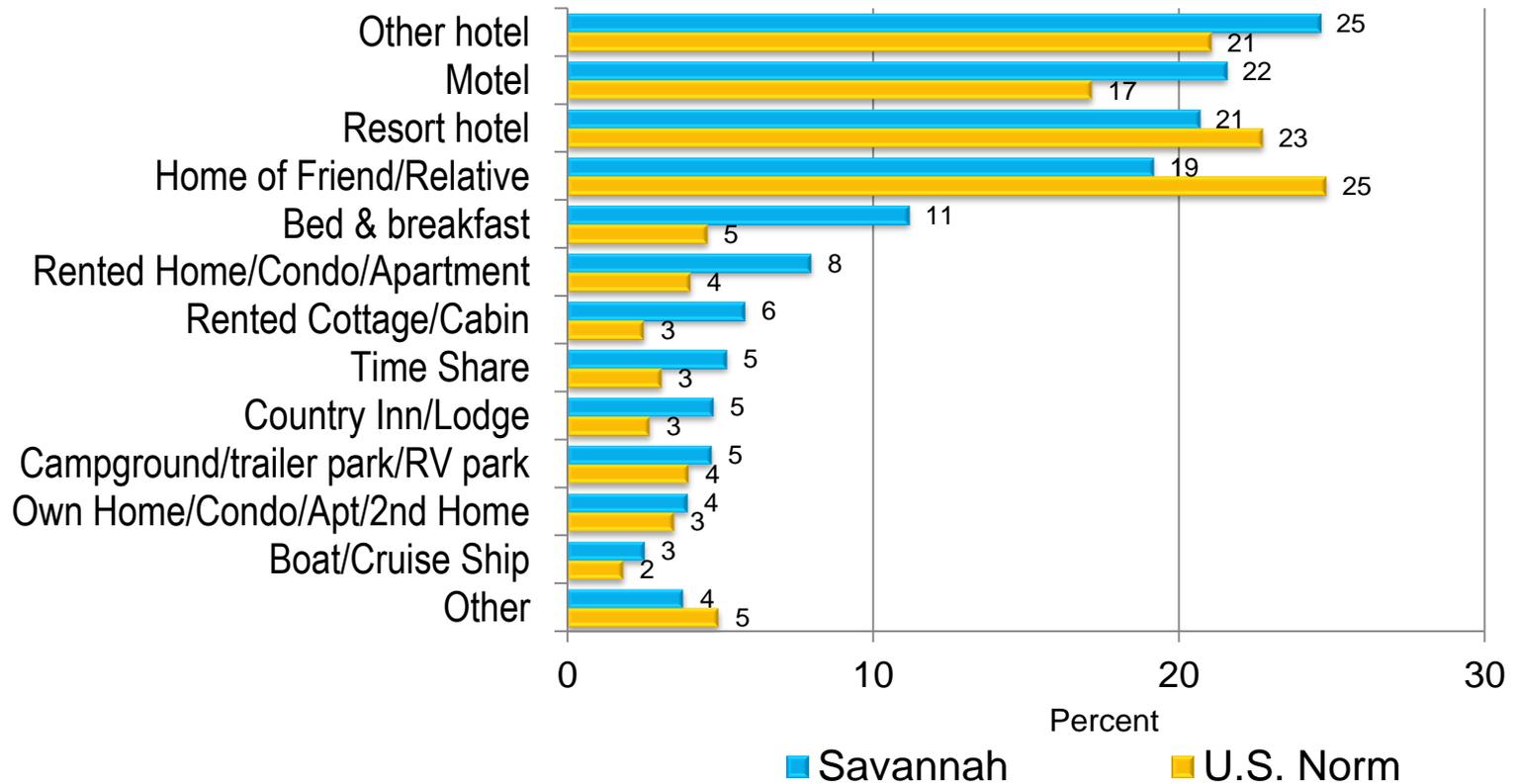
Number of Nights Spent in Savannah 2016 vs. 2015

Base: Overnight Person-Trips with 1+ Nights Spent In Savannah



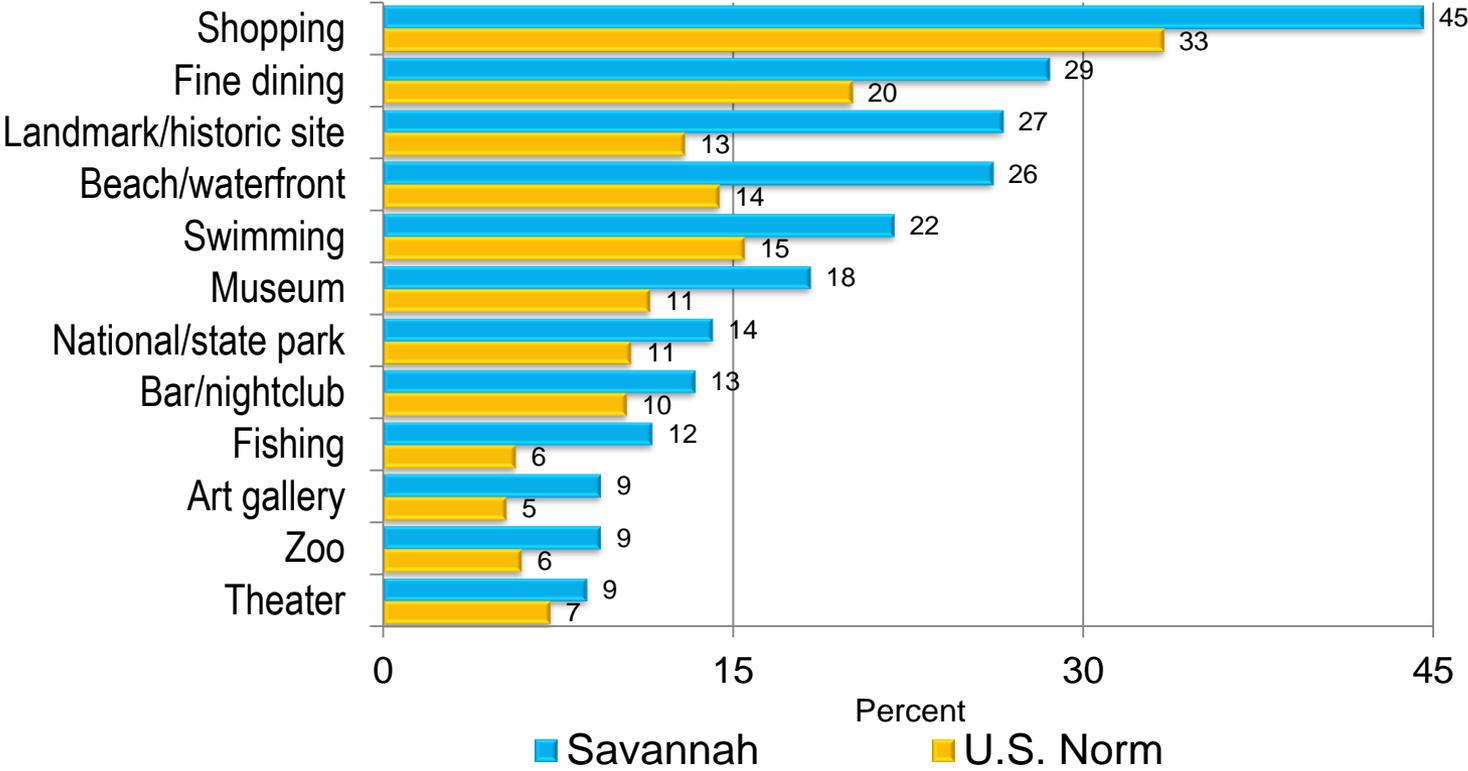
Accommodations

Base: Total Overnight Person-Trips



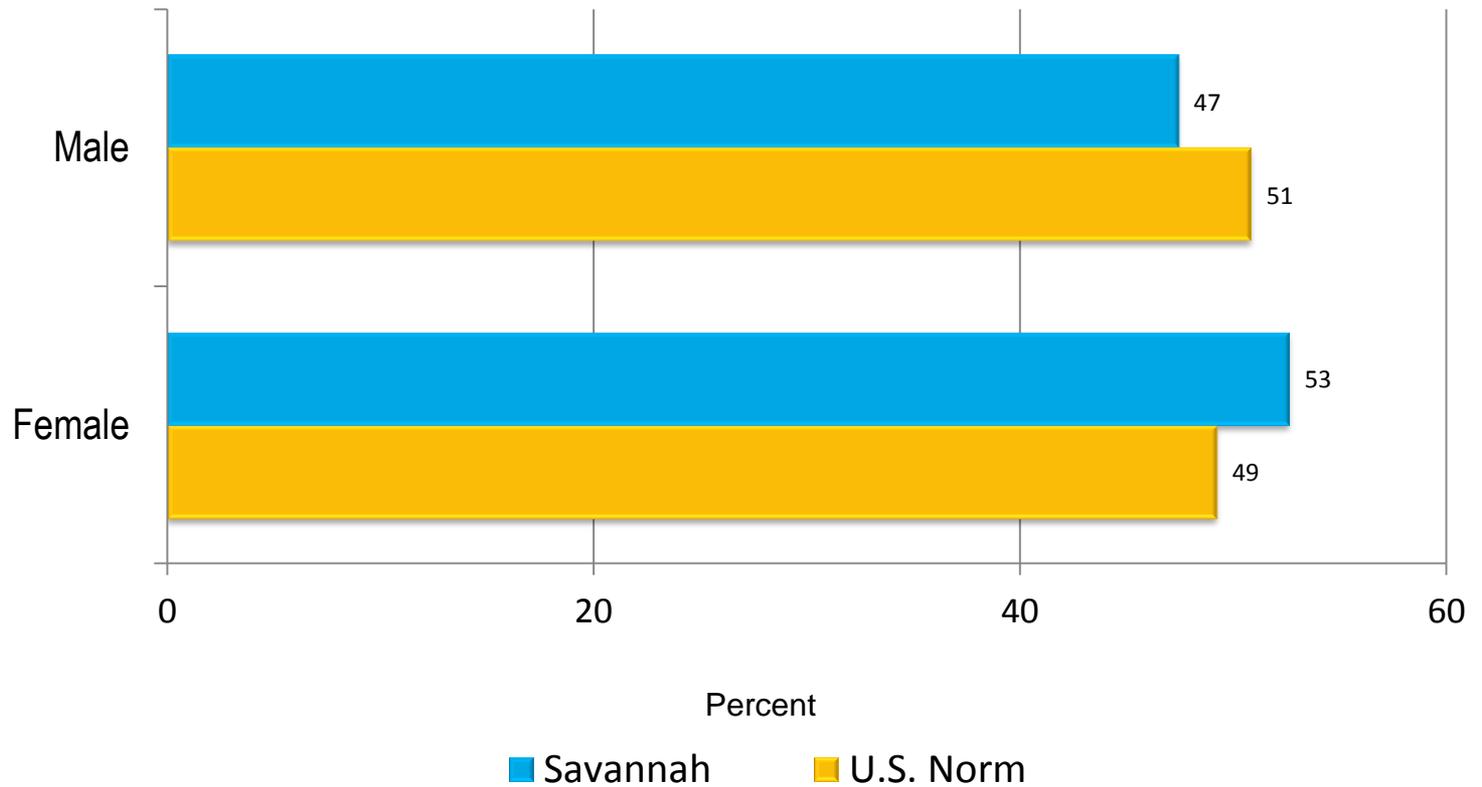
Activities and Experiences

Base: Total Overnight Person-Trips



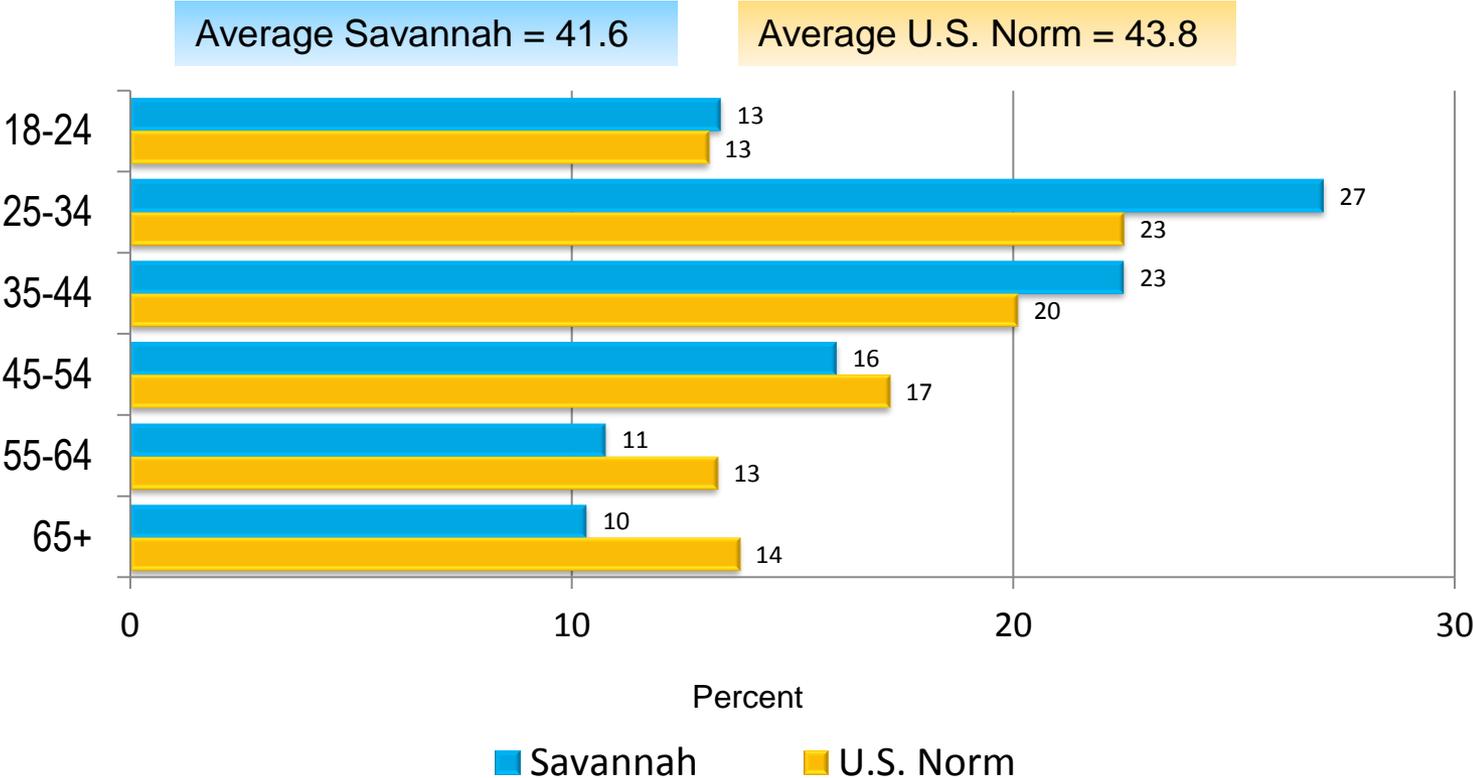
Gender

Base: Total Overnight Person-Trips



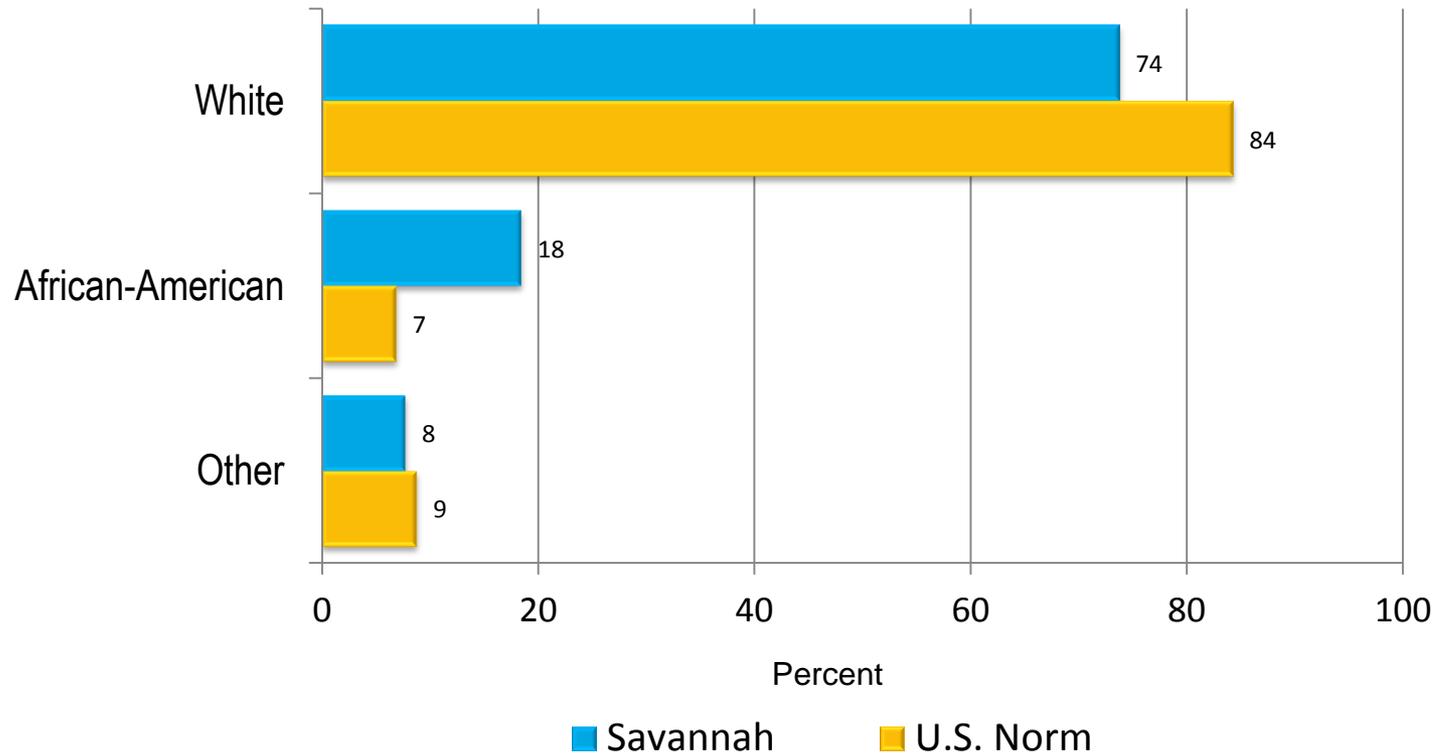
Age

Base: Total Overnight Person-Trips



Race

Base: Total Overnight Person-Trips





Longwoods
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Savannah

2016 Visitor Study



Savannah Tourism Management Plan

Update as of May 16, 2017



Phase I - Research and Discovery : Taps into organizational and industry intelligence, as well as any qualitative and quantitative data acquisition.

Status: COMPLETE

- 35 one-hour, stakeholder telephone interviews, with representational balance between residents, historic preservation, tourism, and government, plus additional 25 hours of comment analysis and categorization
- 10 in-person Discovery Sessions week of March 27
(Mayor; Several Aldermen; City Manager; Neighborhood Associations; TLC; DBA; Tour Service Industry; Visit Savannah; HSF; TAC)
- Public survey with more than 928 responses
- Full analysis and key findings of all feedback and research



Savannah Tourism Management Plan

Update as of May 16, 2017



Phase II - Development and Design: Development of issues brief based on findings

Status: In progress

- Refine key issues and potential objectives
- Design process and content for 8 strategic in-person sessions, week of June 5
- Identify city and industry influencers and thought leaders for participation in strategic sessions
- Evaluate public survey results and incorporate into planning sessions



Savannah Tourism Management Plan

Update as of May 16, 2017



Phase III - Strategic Planning & Activation: Executive face-to-face collaborative sessions week of June 5 to prioritize and formalize opportunities, tourism management plan design, destination alignment, and implementation timeline

Status: On schedule to begin early June



Savannah Tourism Management Plan

Phase II: Week of June 5

Outcome and Objective Overview

Input and Analysis

The Discovery Phase brought to the forefront prioritization and consensus around four (4) proposed outcomes and eight (8) supporting objectives:

- **Elevate Tourism Workforce Training & Opportunities**
 - Create Partnerships and Programs that Develop Life Skills and Career Paths
 - Train Tourism Professionals to Promote Savannah’s Vision & Diverse Heritage
- **Broadened Diversity in Type of Traveler and Product Experiences**
 - Explore Development of Authentic Savannah Experiences Beyond the Existing Inventory in the Historic District
 - Effective Management of Tourism Congestion
 - Effectively Communicate Efforts and Success to Attract Longer-Stay Visitor to Savannah Residents and Businesses Outside the Tourism Sector (*note: recommended for consideration as an internal Visit Savannah initiative – no session scheduled*)



Savannah Tourism Management Plan

Phase II: Week of June 5

- **Preserve and Sustain: Integrity of Neighborhoods, Savannah's Unique Culture and Heritage, and Residents' Positive Quality of Life**
 - Ensure Focus on Historic Preservation and Sustaining Savannah's Unique Heritage and Culture
 - Better Balance the Realities of Living in a Mixed-Use area
- **Structure and Process Aligned with Tourism Management Plan**
 - Ongoing, Collaborative Data-Driven Solution-Based Planning with All Stakeholders to Address Mutual Challenges
- The strategic planning sessions scheduled to be held the week of June 5, 2017 will explore how to strategically approach the key issues that frame both the outcomes and the objectives through a series of small, strategic group discussions.

Economic Impact Study of Tourism

- Study of the economic and social impact of tourism to include a cost benefit analysis identifying the direct/indirect costs and benefits:
 - tourism within the City
 - impact on City services
 - quality of residential life
- Due: May 30
- Event #5215

