

2015 PATRIOTS POINT DESTINATION IMAGE SURVEY REPORT

University of South Carolina

College of Hospitality, Retail, & Sport Management

International Tourism Research Institute

Patriots Point Development Authority



USS YORKTOWN
PATRIOTS POINT DEVELOPMENT AUTHORITY



EXECUTIVE SUMMARY

Patriots Point and the USS Yorktown continue to be valuable tourism assets with significant economic impact for the Charleston area and the greater state of South Carolina. Based on our years of conducting this research report, it is clear that the sizable stability of spending by Patriots Point visitors is a great benefit to South Carolina and overall tourism in the state.

In the fall of 2014, researchers from the University of South Carolina and the International Tourism Research Institute directed a comprehensive visitor profile, destination image, and economic impact study for Patriots Point and the USS Yorktown. Herein these researchers provide details concerning the data collection methods and research design of the project. Further provided are the results of these methods, including findings relative to individual survey questions, insightful conclusions, and future recommendations for Patriots Point.

Specifically, the focus of this project was centered on three primary areas: (1) visitor and resident satisfaction with Patriots Point and the USS Yorktown, (2) the financial impact of Patriots Point and the USS Yorktown on local and state economies, and (3) the perceived destination image of Patriots Point and the USS Yorktown. This report—one of two—will address perceived destination image of Patriots Point and the USS Yorktown.

RESEARCH METHODS

USC researchers conducted a total of 573 surveys using paper-and-pencil questionnaires. Throughout the winter, spring, and summer months of 2014-2015, surveys were conducted among more than 327 visitors and 82 residents (additional surveys were deemed unusable due to respondents' unique circumstance of having attended Patriots Point for a Boy Scouts event) to gather perceptions of Patriots Point and its many offerings while these consumers were on-site. For the destination image survey, the research team collected 164 surveys in various parts of downtown Charleston and surrounding areas, such as the Waterfront Park, South Carolina Aquarium, Folly Beach, and the Charleston Market.



DOWNTOWN AND BEACH VISITORS

Demographically, 59% of downtown and beach visitors had a relative that had served in the military, followed next by those reporting having had a parent service in the military (29%). Majority of respondents were male (66%) and more than half (59%) were between ages 25-44 years. Forty-eight percent were married or with a partner, followed by respondents who were reportedly as single (41%). There was a relatively even representation of respondents with regard to household income, with the majority reported a household income between \$75,000 and \$99,999 (27%).

Most of the respondents to the destination image survey indicated that this was not their first visit to Charleston—71% of respondents answered that they had visited the Charleston area before. For those that had visited Charleston before, an average of seven trips over the past five years was reported. On this visit, respondents reported staying an average of 2.5 nights. Comparatively, the number of visits and room nights are greater than those visitors to Patriots Point.

Most respondents reported the main reason for their visit was vacation (67%), followed by attending a special event or show (15%) and business-related (13%). An average of 3 adults and 2 children were included in the travel party; however, only 42 respondents responded having children in their group.

A majority of travelers said that they had heard of Fort Sumter (85%) and most frequently associated the Civil War (44 responses), history (25 responses), and military (16 responses) with that attraction. Thirty-three percentage of the respondents said that they had actually visited Fort Sumter, and 9% reported they had plans to visit Fort Sumter on current trip.

Similarly, a high percentage of downtown and beach visitors had heard about the South Carolina Aquarium (86%), with words like “fish,” “ocean,” and “marine life” coming to mind most prominently with that attraction. A lower percentage of respondents had visited the Aquarium (29%). However, 16% reported having plans to visit the Aquarium on their visit.



In comparison with Fort Sumter and the South Carolina Aquarium, fewer visitors reported hearing of Patriots Point (63%); however, this number jumped for the first time above the 60% mark. This could be a sign that Patriots Point is becoming a prominent attraction with positive word-of-mouth and/or marketing. Words like “history,” “fighter jets/plans,” and “USS Yorktown” were most frequently associated with the attraction. Interestingly, even with the increase in brand awareness among these respondents, a lower percentage had ever visited Patriots Point (33%), which is lower than previous years. These findings shed some light on a potential increase in brand awareness among non-visitors, which should also increase new consumer visitation in the coming years to Patriots Point if the pattern should continue in this direction. Only 13% reported plans to visit Patriots Point during the current visit. Among the respondents who had visited Patriots Point previously, 47% were “extremely likely” to recommend Patriots Point to a friend or colleague.

Many visitors reported not visiting Patriots Point on the current trip due to lack of time or because they had visited once before and did not feel intrigued by a second visit. While the former result means Patriots Point is still fighting for discretionary time among Charleston attractions, the latter point is interesting since many previous visitors do not feel Patriots Point is worth returning to experience. Consistent with our recommendations in the visitor and resident surveys, we believe special events, added attractions, and more interactive experiences will increase repeat attendance for many of these “one-time” visitors. These could be better highlighted in relationship marketing (email follow-ups) and social media.

Most respondents associated Patriots Point with words like “patriotism” or “military,” and 67% of visitors to the downtown and beach areas responded the image of a USS Yorktown would make them more likely to visit Patriots Point.

As far as awareness that the USS Yorktown was part of Patriots Point, 53% of respondents reported awareness. For the USS Clamagore, 18% visitors reported awareness. For WWII planes, 39% of visitors were aware. In comparison, 24% were aware of the Congressional



Medal of Honor Museum and 19% were aware of the Cold War Museum. Respondents in the survey reported 20% awareness of the golf course on site and 17% awareness for the Vietnam Support Base. Each of these above figures were down from previous years, which is interesting given the overall greater awareness for Patriots Point (as a brand) among the respondents. If this pattern were to continue, it could potentially mean that Patriots Point as a brand is gaining more momentum in the marketplace, with the individual attractions needing more marketing/promotion to keep up with increased visibility of Patriots Point.

On a scale of 1 = “not exciting at all” and 5 = “very exciting,” the average for Patriots Point (4.15) was more than the South Carolina Aquarium (3.78) and Fort Sumter (3.56). Similarly, Patriots Point rated more fun (4.01) than the South Carolina Aquarium (3.93) (although not significantly more) and Fort Sumter (3.66). Asking if the attraction was educational, Patriots Point (4.09) rated slightly lower than Fort Sumter (4.16) but significantly higher than the South Carolina Aquarium (3.74). Similarly in terms of interest, Patriots Point rated slightly (4.18) higher than the South Carolina Aquarium (3.95) and Fort Sumter (3.92). Finally, for accessibility, Patriots Point rated ahead (4.11) of Fort Sumter (3.38) but behind the South Carolina Aquarium (4.25).

RECOMMENDATIONS AND CONCLUSIONS

As results relate directly to Patriots Point and USS Yorktown, downtown and beach visitors who also attended Patriots Point were highly satisfied with their overall visit and expressed their intentions to speak positively about their experience. While consumer intentions don't necessarily always lead to actual behavior, it is good to know that many of these previous visits will lead to many of these individuals to visit again in the next two years.

Further, based on past results and findings from this year's study, many respondents who visited Patriots Point stayed in areas similar to respondents in the visitor study—majority of respondents in both studies staying in paid accommodations in/around the Charleston area. Therefore, due to the vast number of different locations for these visitors, there is potential for some business partnerships for Patriots Point and USS Yorktown managers to pursue. It is common for tourist attractions to partner with hotels and inns and other accommodating lodging areas to advertise events, shows, deals, or schedules for the upcoming season/year.



Although many of these paid visitor accommodations might already be partners of Patriots Point and the USS Yorktown, it would benefit the property to seek out new places in which their out-of-town visitors may be staying. As the city of Charleston continues to grow and develop, so too must the business relationships of Patriots Point and the USS Yorktown.



We recommend research be conducted on those respondents who visited Patriots Point and the USS Yorktown for insights related to marketing-related variables (e.g., sponsor and partner awareness and effectiveness; perceptions of service quality; customer involvement; and social media trends, brand image/attitudes). In addition, property managers may want to understand the reasons why respondents who did not visit Patriots Point decided not to visit. While the Image survey provided researchers some valuable information as far as the word associations that come to mind when viewing Patriots Point or the USS Yorktown, we still do not know why these respondents choose not to visit. That said, this year's study did ascertain some meaningful insights into what more Patriots Point could do to attract these respondents to visit during future trips to Charleston or nearby areas. The top answers for this question were more special events, interactive exhibits, ghost tours, VIP guided tours, and annual passes. In general, we strongly recommend marketing and sales staff to think about ways in which the property can be "flipped" for various holidays, special events, or promotional days/weeks. For instance, how can a visitor experience the Medal of Honor Museum or the Vietnam Experience Exhibit differently on repeated/subsequent visits?



The data demonstrates that when shown a photo of the tourist attraction, more than 67% of respondents said they would visit, which is consistent with last year's report. This topical information, while inherently positive from a practical standpoint, is not entirely realistic as there are more important consumer motives that might be at play. As described last year, internal motivation is driven by a person's needs, values, and goals, but relevant to tourist behavior, mostly needs and values. On the other hand, external activation comes from the attraction itself and/or the property site/service. There are numerous studies that research the motives and points of attachment individuals have with a property (i.e., what is it about the property that matters most to the individual, or what most likely made them visit?). We recommend future studies conduct a more specific study centered on visitors' motivations and points of attachment with the property.





In conclusion, Patriots Point and the USS Yorktown are valued attractions by attendees, both visitors and residents, at both downtown and beach locations. Further, it is apparent that people who pay to visit these attractions are satisfied with the experience across many different consumer levels. It likewise is apparent that various stakeholders will continue to support the attractions in the future. We also know that non-visitors have are more aware of Patriots Point compared to previous years, and when these respondents view images of Patriots Point and the USS Yorktown they have positive feelings toward the property and its attractions. Much still is not known as to the motivations for both visitors and non-visitors, however. To what do they attribute their attachment for visiting? What internal motivation can we satisfy with our attractions to those respondents who have not attended, or do not plan on attending?

PROJECT TEAM

- | | |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dr. Rich Harrill | Project Director; Research Professor; Director, International Tourism Research Institute; Acting Chair, Department of Hotel, Restaurant, & Tourism Management, University of South Carolina |
| Dr. Khalid Ballouli | Assistant Professor, Department of Sport and Entertainment Management, University of South Carolina |
| Dr. Matt Brown | Associate Professor, Department of Sport and Entertainment Management, University of South Carolina |
| Dr. Xiang (Robert) Li | Associate Director, International Tourism Research Institute |