

# The Value of Beaufort and Port Royal's Heritage Tourism Segment



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## The Value of Beaufort and Port Royal's Heritage Tourism Segment

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- Where did the data come from?
- The Beaufort Virtual Guestbook Demographic Comparison
- Visitor Demand for Beaufort Heritage Attractions
- So where is your geographic target market?
- Concluding Thoughts



# Where did the data come from?



**These data were extrapolated from the following Beaufort visitor survey research projects since 2009**

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<b>Event/Research Project</b>	<b>Sample Size</b>	<b>Sampling Method</b>
The Ongoing Beaufort Visitor Guestbook (2013 to Current)	794	Convenience
2015 Taste of Beaufort	228	Convenience
2014 High on the Hog Festival	102	Convenience
2013 Beaufort Shrimp Festival	218	Convenience
2013 Beaufort Water Festival	341	Convenience
2011 MCAS Air Show	261	Convenience
2012 Beaufort Zip Code Analysis	15,000+	Convenience
2011 Mining of Beaufort Visitor Inquiry Dataset	11,525	Convenience
2009 Assessing Beaufort's Tourism Markets Via Data Integration	5,900	Convenience

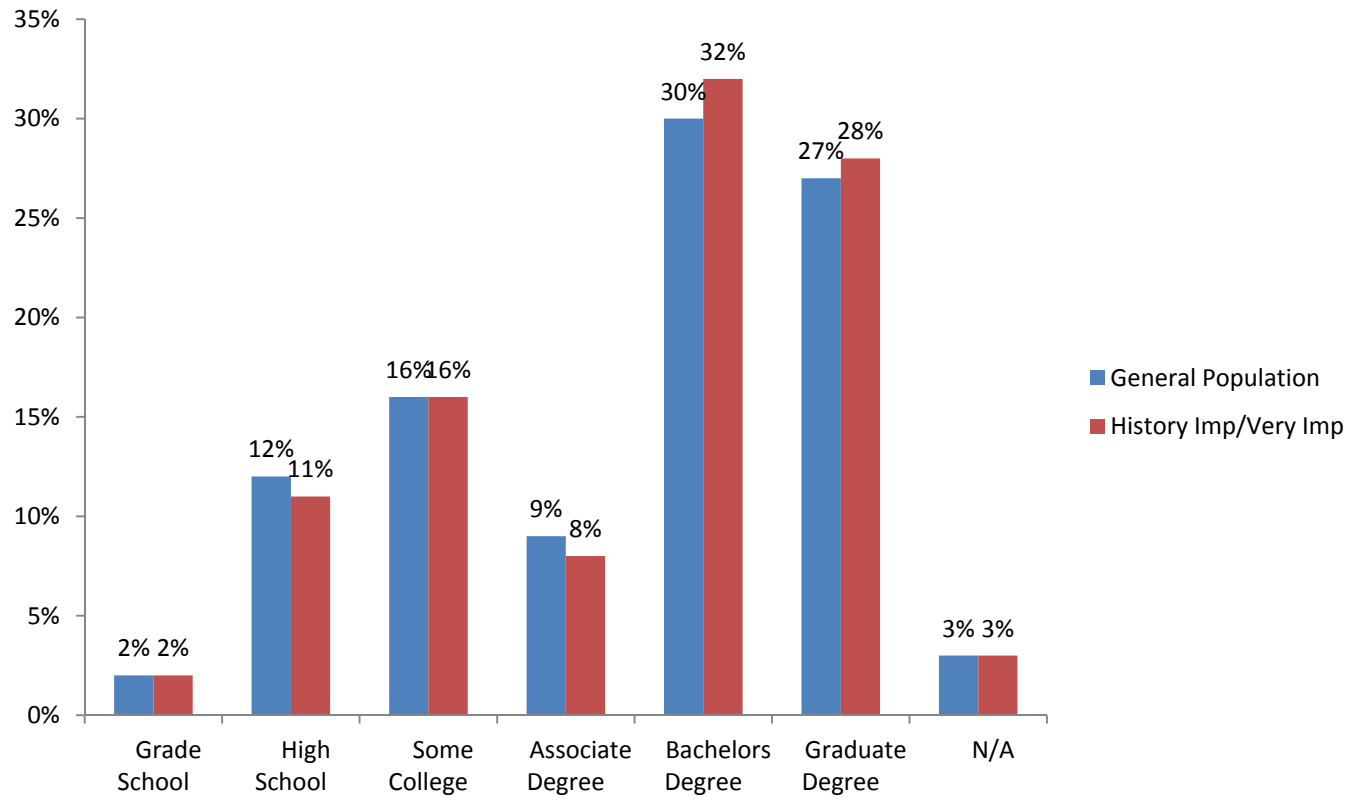
# Beaufort Virtual Guestbook Demographic Comparison



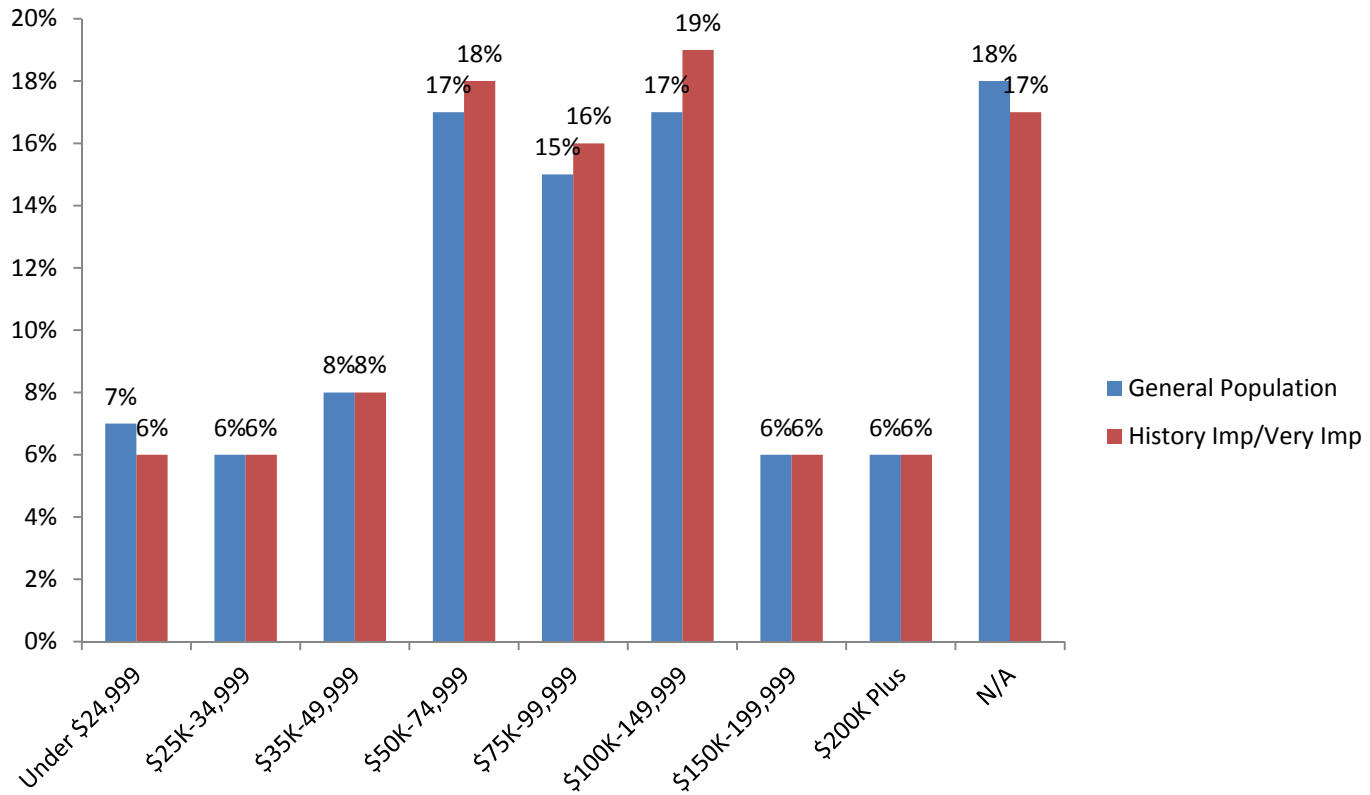
## Demographic Comparison: General Population vs History Imp/Very Imp

Demographic Category	General Population	History Imp/Very Imp
Gender		
Male	49%	50%
Female	51%	50%
Age		
18-20	4%	3%
21-30	10%	10%
31-40	10%	9%
41-50	19%	19%
51-60	22%	23%
61-70	24%	27%
71 Plus	8%	8%
N/A	2%	1%
Marital Status		
Married	72%	76%
Single	22%	20%
N/A	5%	4%
Children Under 18 at Home		
Yes	26%	25%
No	67%	69%
N/A	7%	6%

## Education Comparison: General Population vs History Imp/Very Imp



## Income Comparison: General Population vs History Imp/Very Imp





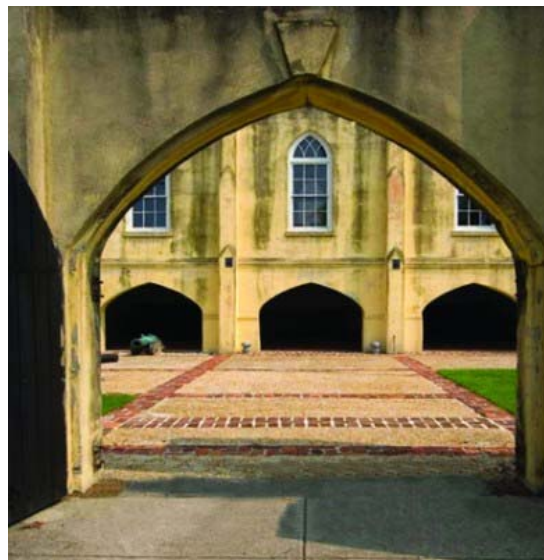
## So who are Beaufort's heritage travelers?

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- Older
- Married
- No Children at home
- Are slightly more educated when compared to Beaufort's general visitor population
- Have slightly higher incomes when compared to Beaufort's general visitor population



# Visitor Demand for Beaufort Heritage Attractions



**Please indicate if you intend on visiting (or have visited) any of the following tourist facilities or participating (or participated) in any of the listed activities during this trip to Beaufort. Choose all that apply. From the 2015 Beaufort Virtual Guestbook**

Answered: 690 Skipped: 98

Answer Choice	Response Percent	Response Count
Beaches	76%	525
Restaurants	72%	494
Historical Landmarks	54%	374
Sightseeing	50%	343
South Carolina State Parks/National Forests	43%	294
Camping	27%	188
Antique Shops	25%	173
Hiking	24%	163
Museums/Performing Arts/Cultural Activities	23%	159
Bicycling	20%	135
Shopping Malls/Centers	17%	118
Fishing	16%	112

## 2015 Taste of Beaufort

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Answer Choice	Response Percent	Response Count
Restaurants	79%	63
Beaches	56%	45
Festivals/Special Events	39%	31
Historical Landmarks	36%	29
Sightseeing	30%	24
Antique Shops	26%	21
Shopping Malls/Centers	26%	21
Art Galleries	21%	17
South Carolina State Parks/National Forests	19%	15
Boating/Sailing	15%	12
Bicycling	13%	10
Convention/Conference Centers	9%	7

## 2014 High on the Hog Festival

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Answer Choice	Response Percent	Response Count
Restaurants	69%	22
Festivals/Special Events	50%	16
Beaches	44%	14
Historical Landmarks	41%	13
South Carolina State Parks/National Forests	34%	11
Shopping Malls/Centers	28%	9
Sightseeing	28%	9
Museums/Performing Arts/Cultural Activities	25%	8
Antique Shops	22%	7
Boating/Sailing	19%	6
Art Galleries	16%	5
Bicycling	16%	5

## 2013 Beaufort Shrimp Festival

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Answer Choice	Response Percent	Response Count
Restaurants	72%	73
Beaches	51%	52
Festivals/Special Events	46%	47
Historical Landmarks	28%	29
Sightseeing	26%	26
Antique Shops	25%	25
South Carolina State Parks/National Forests	20%	20
Fishing	20%	20
Museums/Performing Arts/Cultural Activities	16%	16
Art Galleries	13%	13
Shopping Malls/Centers	13%	13
Other	13%	13

## 2013 Beaufort Water Festival

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Answer Choice	Response Percent	Response Count
Restaurants	78%	39
Beaches	70%	35
Festivals/Special Events	50%	25
Sightseeing	38%	19
Shopping Malls/Centers	32%	16
South Carolina State Parks/National Forests	30%	15
Historical Landmarks	28%	14
Antique Shops	26%	13
Fishing	20%	10
Museums/Performing Arts/Cultural Activities	18%	9
Children's Activities	18%	9
Boating/Sailing	16%	8

## 2011 MCAS Air Show

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Answer Choice	Response Percent	Response Count
Restaurants	60%	74
Beaches	57%	70
Festivals/Special Events	27%	33
Historical Landmarks	25%	31
Sightseeing	25%	31
Other	23%	29
Shopping Malls/Centers	23%	28
South Carolina State Parks/National Forests	19%	24
Beaufort Main Street	17%	21
Museums/Performing Arts/Cultural Activities	15%	18
Camping	14%	17
Fishing	13%	16



## How important were the following factors in deciding to visit Beaufort? From the Beaufort Virtual Guestbook

Answered: 745 Skipped: 43

	Very important	Somewhat important	Neutral	Not very important	Not important	Total	Weighted Average
Historic interests	49%	31%	14%	3%	4%	714	4.17
Access to beaches	58%	18%	11%	5%	7%	669	4.15
Dining options	23%	34%	28%	7%	8%	663	3.57
Arts/cultural activities	17%	30%	32%	9%	22%	616	3.08
Shopping opportunities	13%	18%	33%	16%	20%	636	2.88
Boating and sailing	14%	16%	23%	14%	34%	612	2.61
Sporting events	6%	9%	28%	17%	39%	605	2.26
Military graduation	9%	5%	23%	12%	51%	604	2.09

## The Importance of Heritage Tourism Attractions to Beaufort

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- Heritage tourism attractions are consistently listed as a top 10 attraction to visit, and is mostly listed as a top five attraction to visit
- Heritage tourism is the leading factor that influences a visitor's trip decision when choosing Beaufort



## So what does all this add up to?

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- 79% of the Beaufort Virtual Guestbook respondents indicated that Historic Attractions were Somewhat/Very Important when deciding to visit Beaufort (vs 61% of HHI visitors)
- 62% of the Beaufort Virtual Guestbook respondents indicated that they visited/or will visit a historic attraction during their stay
- The average per person daily spend of visitors that indicate that historic attractions are important when deciding to visit Beaufort is \$106.71
- Utilizing the USCB 2014 annual visitor estimate of 265,641, the heritage traveler (who stays in Beaufort/Port Royal hotels) spends over \$17.57 million in direct travel related expenses in Beaufort/Port Royal and accounts for a Total Economic Output of over \$19.8 million (IMPLAN Model)
- Supports an estimated 255 jobs in Beaufort/Port Royal



# So where is your geographic target market?



## Beaufort Virtual Guestbook

Rank Order	Metropolitan Area	Sum of F2 by Metropolitan Area	% Share	% Share - Arbitron	% Share - Nielsen	% Share - Scarborough
1	Charleston-North Charleston, SC MSA	16	23%	22%	22%	22%
2	Columbia, SC MSA	15	21%	21%	21%	21%
3	Augusta-Richmond County, GA-SC MSA	5	7%	7%	7%	7%
4	Atlanta-Sandy Springs-Marietta, GA MSA	6	8%	6%	6%	6%
5	Jacksonville, FL MSA	4	6%	5%	5%	5%
6	Charlotte-Gastonia-Concord, NC-SC MSA	4	6%	5%	5%	5%
7	Lancaster, SC MSA	2	3%	3%	3%	3%
8	Walterboro, SC MSA	2	3%	3%	3%	3%
9	Jasper, IN MSA	2	3%	3%	3%	3%
10	Anderson, SC MSA	2	3%	3%	3%	3%
11	Rapid City, SD MSA	2	3%	3%	3%	3%
12	Chicago-Naperville-Joliet, IL-IN-WI MSA	5	7%	3%	4%	3%
13	Jacksonville, NC MSA	2	3%	3%	3%	3%
14	Syracuse, NY MSA	2	3%	3%	2%	2%
15	Greenville, SC MSA	2	3%	2%	2%	2%
TOTAL		71	100%	100%	100%	100%

## 2012 MSA Visitor Demand Analyses for the Town of Beaufort, SC: Beaufort Leads

% Share Rank after Controlling for Population	Metropolitan Area	Sum of Zip Codes by MSA	% Share of Beaufort Inquiries	Arbitron Share	Nielsen Share	Scarb Share	BF%S- A%S	BF%S- N%S	BF%S- S%S
1	Greenville, SC MSA	187	8%	1%	2%	1%	6%	5%	6%
2	Atlanta-Sandy Springs-Marietta, GA MSA	290	12%	6%	6%	7%	5%	6%	5%
3	Charlotte-Gastonia-Concord, NC-SC MSA	173	7%	3%	3%	3%	4%	4%	4%
4	Augusta-Richmond County, GA-SC MSA	114	5%	1%	1%	0%	4%	4%	-5%
5	Columbia, SC MSA	94	4%	1%	1%	0%	3%	3%	-4%
6	Charleston-North Charleston, SC MSA	52	2%	1%	1%	1%	1%	1%	1%
7	Jacksonville, FL MSA	57	2%	2%	2%	2%	1%	1%	0%
8	Knoxville, TN MSA	39	2%	1%	1%	2%	1%	0%	0%
9	Virginia Beach-Norfolk-Newport News, VA-NC MSA	60	2%	2%	2%	2%	1%	1%	0%
10	Pittsburgh, PA MSA	79	3%	3%	3%	3%	0%	0%	0%

## 2012 MSA Visitor Demand Analyses for the Town of Beaufort, SC: Hunting Island Camp Sites

% Share Rank after Controlling for Population	Metropolitan Area	Sum of Zip Codes by MSA	% Share of Hunting Island Standard Sites	Arbitro n Share	Nielsen Share	Scarb Share	HISF%-A%S	HISF%-N%S	HISF%-S%S
1	Greenville, SC MSA	3333	23%	2%	4%	2%	21%	19%	21%
2	Augusta-Richmond County, GA-SC MSA	1862	13%	1%	1%	0%	12%	12%	-13%
3	Columbia, SC MSA	1871	13%	1%	2%	0%	12%	11%	-13%
4	Charleston-North Charleston, SC MSA	1517	11%	1%	1%	1%	9%	9%	9%
5	Charlotte-Gastonia-Concord, NC-SC MSA	1294	9%	5%	5%	5%	4%	4%	4%
6	Knoxville, TN MSA	370	3%	2%	2%	3%	1%	0%	0%
7	Kingsport-Johnson City, TN MSA	255	2%	1%	1%	0%	1%	0%	-2%
8	Myrtle Beach-Conway-North Myrtle Beach, SC MSA	145	1%	1%	1%	0%	0%	0%	-1%
9	Newberry, SC MSA	117	1%	0%	0%	0%	-1%	-1%	-1%
10	Statesboro, GA MSA	134	1%	0%	0%	0%	-1%	-1%	-1%

## Mining of Beaufort Visitor Inquiry Data Set

Previous Rank	Adjusted Rank	Metropolitan Area	%Share VI	%VI-A	%VI-N	%VI-S
2	1	Greenville/Spart/Anderson, SC and Asheville, NC MSA	13.01%	12%	11%	12%
1	2	Atlanta-Sandy Springs-Marietta, GA MSA	16.44%	12%	12%	11%
3	3	Charleston-North Charleston, SC MSA	11.55%	11%	11%	11%
4	4	Raleigh-Cary/Durham, NC MSA	9.28%	8%	7%	7%
6	5	Columbia, SC MSA	6.82%	6%	6%	7%
5	6	Charlotte-Gastonia-Concord, NC-SC MSA	7.57%	5%	5%	5%
8	7	Savannah, GA MSA	2.42%	2%	2%	2%
7	8	Jacksonville, FL MSA	3.10%	2%	2%	1%
10	9	Orangeburg, SC MSA	1.59%	2%	2%	2%
12	10	Florence, SC MSA	1.18%	1%	1%	1%
11	11	Augusta-Richmond County, GA-SC MSA	1.51%	1%	1%	2%
16	12	York-Hanover, PA MSA	0.88%	1%	1%	1%
18	13	Fayetteville, NC MSA	0.74%	1%	1%	1%
14	14	Myrtle Beach-Conway-North Myrtle Beach, SC MSA	0.98%	1%	0%	1%
20	15	Hickory-Lenoir-Morganton, NC MSA	0.62%	1%	1%	1%
NR	16	Sumter, SC MSA	0.60%	1%	1%	1%
NR	17	Dunn, NC MSA	0.56%	1%	1%	1%
NR	18	Greenwood, SC MSA	0.55%	1%	1%	1%
NR	19	Rocky Mount, NC MSA	0.54%	1%	1%	1%
NR	20	Georgetown, SC MSA	0.49%	0%	0%	0%



## Top Geographic Target Markets

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- Charlotte
- Charleston
- Columbia
- Augusta
- Atlanta
- Jacksonville
- Greenville



## Conclusion

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- Heritage attractions are in demand by visitors to Beaufort
- Heritage attractions are influential when an individual is deciding to visit Beaufort
- The heritage traveler significantly impacts the Beaufort/Port Royal economy
- Your visitors as well as the heritage travelers can be found in drive markets



## For More Information Contact

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