

## *Developing Visitor Profiles at an American Cultural/Heritage Tourism Attraction: A case study of the USS North Carolina Battleship Memorial*

### Introduction

Profiles are a common tool for marketers to better understand their customer, the needs and expectations of the customer, and how to create an awareness of the product to this particular consumer. This case study provides visitor profiles for a cultural / heritage tourism site, based on visitor satisfaction with the overall experience. Managers and marketers alike are responsible for making decisions based on credible information that will set the organization/establishment/tourism site up for success. This case provides students with the opportunity to explore these decisions using credible information, and apply the situation to marketing and managerial decision-making practice.

### Teaching Objectives

The case study includes multiple concepts that can be used in a variety of settings. These concepts include cultural / heritage tourism, visitor needs and expectations, market research and visitor profiles, marketing, and management. The instructor can select the key areas most applicable for focus or use all aspects of the case as this is all the information that must be considered for management in terms of decision-making. Upon completion of the case study students should be able to:

- Identify and define cultural / heritage tourism.
- Understand visitor profiles to cultural / heritage tourism.
- Stimulate discussion about visitor needs and expectations.
- Identify and define existing visitor profiles through the case study and based on the student's own experiences.
- Identify the managerial and marketing issues for cultural / heritage tourism operators.
- Stimulate discussion regarding decision-making and resource allocation for cultural / heritage tourism sites related to managerial and marketing implications of visitor profiles and expectations.

### Teaching Strategy

The case can be used in many courses as a learning tool, including Marketing, Management, Tourism, and Hospitality Facilities and Operations. This case can be used in a variety of ways including an independent assignment, a small group assignment, an exam, and/or a multi-day in class discussion and assignment. The recommendation for the case below is based on a multi-day in class discussion and assignment. The suggested layout for this use should include at least two 50 minute class meetings. Sections A, B, and C are intended to introduce the case while E and F encourage understanding of the material through small group discussion. Sections H and I are completed during the second class meeting.

A. An initial discussion of cultural / heritage tourism with students

using the following questions to generate discussion (5 minutes):

- Describe tourism.
- What are some of your recent tourism experiences?
- During this recent experience what were your expectations/needs as a traveler? Were these met? How could they have been met better?
- Did you visit any cultural / heritage sites?
- What are cultural / heritage sites?
- What cultural / heritage sites would you want to visit and why?
- How are these sites different from other tourism sites?
- What challenges or benefits for the management staff are brought about from these differences?

B. Using one of the resources provided below, pull up a listing of worldwide and/or nationwide cultural / heritage tourism sites. Share these with the students. (5 minutes)

- UNESCO World Heritage Sites
  - <http://whc.unesco.org/en/list/>
  - <http://travel.nationalgeographic.com/travel/world-heritage/>
- National Heritage Areas
  - <http://www.nps.gov/heritageareas/> (drop down menu on right of webpage)
- National Trust for Historic Preservation
  - <http://www.preservationnation.org/travel-and-sites/>

C. Have students begin discussing what expectations visitors will have at these sites. How does better understanding the types of visitors or the profiles of visitors enable management to meet these expectations? (5 minutes)

D. After this initial discussion assign individual students to read the case in class. (15 minutes)

E. Small groups-have students create small groups so that they can review the case and discuss. Provide a list of questions to help the small groups get started. Some of these questions may include:

- Describe the USS North Carolina Battleship Memorial.
- What are the visitor profiles of the USS North Carolina Battleship Memorial?
- How do these compare to culture / heritage tourism visitor profiles?
- What are the key needs and expectations of visitors to the USS North Carolina Battleship Memorial?
- Can the USS North Carolina Battleship Memorial meet all the needs of all their visitors? Why or why not?

- How can a manager or marketer use this information?
- How will this information impact operations? The marketing plan?

F. Have the small groups synthesize their initial discussion into key points and questions to present to the class informally. How can the information gained related to the visitor profiles be used to improve the current Battleship experience using the model provided in the case? Use the discussion question provided in the case to facilitate discussion between the small groups and the class as a whole. (E/F, 20 minutes)

G. From the assignments provided in the case select those that are most applicable and assign as a small group or individual homework assignment. Students should be prepared to submit, share, discuss, and defend their response during the next class meeting. [Completed outside of class. The second session doesn't have to be consecutive if the instructor wishes to give individuals or groups more time to complete the assignment(s).]

H. Small groups should present their findings and support their decisions to the class. Questions from other groups and the instructor will facilitate discussion. (40 minutes)

I. Summarize the key points of the case and key findings/conclusions of the small groups. At the close of this session an agreed upon, recommended course of action should be generated in terms of managerial decisions and marketing based on the visitor profiles provided in the case. (10 minutes)

- Key points of the case:
- Drivers of satisfaction: first impression and employee satisfaction
- Four steps involved in cultural / heritage tourism: (1) assessing the potential; (2) planning and organizing; (3) preparing, protecting, and managing; (4) marketing for success
- Five principles in cultural / heritage tourism: (1) collaboration; (2) finding the right fit; (3) make sites and programs come alive; (4) focus on quality and authenticity; (5) preserving and protecting
- Key daily life factors can impact how satisfied a visitor feels, including warm relationships with others, excitement, a sense of accomplishment, etc.
- Visitor profiles: definition, how they are created, and then used for marketing and managerial purposes
- Culture / heritage tourism is defined as: "the act of traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past"

## Assignments

For this case study the assignments have been linked to each of the teaching objectives. Through the use of these assignments the instructor will be able to gauge the students' understanding and suc-

cessful application of the material. The instructor may choose the assignment(s) he/she feel best target the desired focus and outcome of the case. Upon completion of the case student should be able to:

### 1. Identify and define cultural / heritage tourism.

#### a. Identify local, state, or regional cultural / heritage tourism sites.

Students can use statewide tourism sites to begin identifying these locations. Local CVB sites may list cultural / heritage sites in the community. This activity creates an awareness of cultural / heritage tourism and a familiarity with its role in the local or state-wide community. By identifying these locations students also have a better understanding of the large variability in heritage tourism sites.

#### b. Identify definitions of cultural / heritage tourism found in literature and in popular press. Compare and contrast these definitions. Conclude with a definition that represents the class/group, and/or individual.

The instructor can provide descriptions and definitions found in the literature, including:

A form of tourism growing in popularity	Chen & Chen, 2010
Changing from product focused to visitor focused	Apostolakis & Jaffry, 2005
Connected to authenticity, genuine and true	Yeoman, Brass, & McMahon-Beattie, 2007
The act of traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past	National Trust for Historic Preservation, 2014

Have students in small groups do a web search for other definitions. These are most likely to come from popular press. Student should then discuss these and synthesize the information, creating their own definition. This activity creates a better understanding of this segment of the industry for the remainder of the case and in their future industry experience.

### 2. Understand visitor profiles to cultural/heritage tourism sites.

#### a. Define visitor profiles. Address how these profiles can be used by hospitality professionals.

Visitor profiles are an attempt to categorize lifestyles of visitors, creating homogenous groups from a heterogeneous sample. These categories can be analyzed to determine the best cultural / heritage tourism products and marketing tactics in order to attract more visitors to the site and to improve the overall experience (Serrato, Tello, Diaz, Garcia, & Castillo, 2010). Understanding the visitor in order to create tailored experiences and offerings (Ho & Ali, 2013; Hanagriff & Higgins, 2009) and successfully plan for future operations are key outcomes of visitor profiles.

b. *Assign small groups. In the small group have the team create a visitor profile for their own group related to hospitality outlets including lodging, food and beverage, and cultural / heritage tourism.*

For this assignment be sure that students cover demographics of the group, average spend for each outlet, and their needs/expectations. Students should also be encouraged to analyze the groups' past spending behavior and address future spending expectations. Using the three outlets allows the group to start with an outlet they may frequent regularly and have more personal experience. Using food and beverage and lodging they can more easily apply this to cultural / heritage tourism.

### **3. Stimulate discussion about visitor needs and expectations.**

a. *How do visitor needs and expectations differ according to demographic factors, such as age, educational level, and annual household income, for hospitality outlets?*

The majority of the sample for this case was employed full-time, Caucasian, college graduates, and earned an income between \$50,000 - \$100,000 per year. The majority of the sample was satisfied with the overall USS North Carolina Battleship Memorial visit. Of these visitors, those that were moderately or highly satisfied are interested in travel that requires them to be active and mobile. Compare this information to what student groups have created as profiles for other hospitality outlets.

b. *Create a list of the visitor needs and expectations for all visitor profiles provided in the case. How should a manager approach meeting all of these in one location with one existing budget?*

The case provided two visitor profiles, those of moderately satisfied visitors and those of highly satisfied visitors. Highly satisfied visitors identify these daily life items as more important than moderately satisfied visitors: self-respect, sense of accomplishment, security, warm relationship with others, self-fulfillment, being well respected, sense of belonging, fun and enjoyment in life, and excitement. Interaction with employees is the greatest driver of satisfaction for visitors as was first impression. Employee interaction could include the need for more interaction during the visit, maybe tour guides, or better quality interaction during the visit. The daily life items of warm relationships with others, being well respected, and sense of belonging can each be linked to employee interaction.

Direct discussion among student groups to include how they can use this information to create a better product, better product delivery, and marketing that attracts these visitors for future visits. Now constrain these decisions under the current budget, no additional funding provided.

### **4. Identify and define existing visitor profiles through the case study and based on the student's own experience.**

a. *Individual reflection: What are your needs/expectations of a cultural / heritage tourism site? How do your expectations differ from your*

*classmates? How should a manager work to meet these differing needs? Create a plan for how your needs/expectations should be met by the site.*

This question could be used as a personal reflection assignment. Having students apply these concepts to their needs and expectations allows for further understanding of the case material and how it impacts the industry and their future managerial roles.

### **5. Identify the managerial and marketing issues for cultural / heritage tourism operators.**

a. *Using the list of cultural / heritage sites developed previously, what managerial and/or marketing issues do they face? Any other challenges?*

Students should account for the location of the heritage site, cultural factors that impact the site or the visitor, budgetary concerns, and current market segments. Answers will vary depending upon the site selected.

b. *Additional resources?*

The issues or challenges identified above may have solutions that require additional resources. These resources can include funding, human capital, information, artifacts, autonomy for the decision-maker, community support, etc. Have students identify these resources.

c. *Develop a SWOT analysis of a heritage tourism site from your list.*

Strengths, weaknesses, opportunities, and threats should be assessed for the heritage tourism site selected by the students. Answers will vary depending upon the site selected.

### **6. Stimulate discussion regarding decision-making and resource allocation for cultural / heritage tourism sites related to managerial and marketing implications of visitor profiles and expectations.**

a. *As a cultural / heritage site that has been allocated the same budget as last year, how would you meet the needs of your consumer? No additional funding is provided.*

This is a realistic situation many managers experience. They are forced to be creative in their problem-solving and decision-making. This assignment challenges students to be creative examine "other" ways to meet stated challenges.

b. *What managerial implications can be determined from the SWOT analysis above?*

Using the SWOT analysis from above have students synthesize the information and create specific implications for management. Answers will vary depending upon the site selected.

c. *Create a marketing plan for Battleship North Carolina incorporating the information provided in the case.*

Marketing plans may include:

- Create a package with local operators

- Use first impressions to drive the marketing campaign
- Utilize local military groups as volunteers to impact interaction
- Focus on fun and enjoyment in collateral materials
- Re-identify target markets using profiles

*d. Select a cultural / heritage site from the list developed. Create a marketing plan for this site using information found on its website and any travel reviews available.*

Answers will vary depending upon the site selected.

*e. What differences exist between the cultural / heritage site from your list and from the case? How do these two marketing plans address these differences?*

Students can compare and contrast the site from the case and the site they selected.

Product and product delivery will likely be different as will visitor needs and expectations. Have students identify these differences and then connect how these are addressed in marketing.

## References

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- Chen, C.F., & Chen, F.S. (2010). Experience quality, perceived value, satisfaction and behavioral intentions for heritage tourists. *Tourism Management*, 31, 29-35.
- Hanagriff, R., & Higgins, L. (2009). Can a local community tourism event positively impact a community's economy? A case study application using 2009 Buccaneer days' event in Corpus Christi, Texas. *The Business Review*, Cambridge, 14(1), 64-69.
- Ho, H. & Ali, S. (2013). Understanding negative visitor experiences at indigenous cultural tourism venues: Marketing and operational implications. *Journal of Marketing Development and Competitiveness*, 7(2), 138-145.
- Serrato, M., Tello, J., Diaz, A., Garcia, S., & Castillo, J. (2010). Visitor profile, satisfaction levels and clustering of tourists for decision making in Michoacan, Mexico. *International Transactions in Operational Research*, 17, 119-143.
- Yeoman, I., Brass, D., & McMahon-Beattie, U. (2007). Current issue in tourism: The authentic tourist. *Tourism Management*, 28, 1128-1138.

## Additional Resources

- Cultural Heritage Tourism, [www.culturalheritagetourism.com](http://www.culturalheritagetourism.com).
- Cultural & Heritage Tourism Alliance; [www.chtalliance.com](http://www.chtalliance.com).
- Heritage Tourism Bibliography, [www.njht.org/dca/njht/touring/bibliography\\_FINAL\\_Jan222010.pdf](http://www.njht.org/dca/njht/touring/bibliography_FINAL_Jan222010.pdf).
- New Jersey Historic Trust, [www.njht.org](http://www.njht.org).
- Vermont Arts Council, [www.vermontartscouncil.org/community/culturalheritagetourism/tabid/75/default.aspx](http://www.vermontartscouncil.org/community/culturalheritagetourism/tabid/75/default.aspx).