



Tourism, Market Assessment, & Branding Plan

CITY OF CAMDEN, SOUTH CAROLINA

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1. Introduction

1.1 Background and Purpose

Camden is a lively community of nearly 7,000 located in the heart of South Carolina. With a rich history dating back to 1732, Camden is the oldest inland city in the state. The city boasts historic architecture, beautiful landmarks, and quaint downtown streets, contributing to its genuine southern style and high quality of life. Camden's unique offerings for leisure sports also add to the city's appeal. Known for its equestrian and motorsports industries, Camden plays host to a unique range of visitors throughout the year and is home to many of these enthusiasts as well. Additionally, its position on the Wateree River makes Camden favorable for an increasing interest in water recreation. Antique Shopping and museums round out the appeal of Camden as a destination. To complement its abundant offerings, Camden is only minutes away from the state capital, Columbia. This location is ideal for delivering big city amenities without compromising small town charm.

Not content to rest on these successes and recognizing more work needs to be done to enhance downtown and the overall retail market for Camden, the City of Camden commissioned this market study, tourism plan, and marketing strategy to examine opportunities to enhance the visitor appeal of Camden, better market to existing and potential customers to retain existing businesses and recruit new businesses, and explore new initiatives to enhance the tourism as an industry for the community while reinforcing the quality of life for Camden residents. Consequently, this study is not simply a report of the numbers, but also a strategic plan for enhancing Camden as a place to shop, invest, and visit. This study is not intended to replace existing plans or initiatives for Camden, but rather to expand on them, provide additional guidance, and set priorities for the coming years.

No study of this nature is complete without a thorough understanding of "on the ground" realities facing a local market whether examining the visitor market or the local retail trade. To help understand the market realities of Camden, the study began with a series of stakeholder interviews and roundtable work sessions in Camden. These interviews and roundtables involved over eighty people including board members and representatives of the Elected Officials, city staff, merchants, property owners, tourism attraction representatives, county officials, and other stakeholders.

In addition to the interviews, seventeen retailers throughout Camden conducted a zip code survey of customers held in September of 2013. The zip code research led to a market definition study and a sales and retail leakage analysis for the community.

To understand the tourism market for Camden, a baseline economic impact model was created using existing data provided by South Carolina Department of Parks Recreation and Tourism and methods developed by Clemson University's International Institute for Tourism Research and Development. This model provides a baseline from which to track future tourism growth in the Camden and Kershaw market.

Altogether, the qualitative and quantitative information was then used to craft a series of recommendations designed to foster growth in the tourism market, reinforce the existing retail market, and enhance the visitor offering of the community. The recommendations are divided into four strategic themes. Each recommendation is prioritized into an immediate (6 months to one year), next step (one year to three years), and long term (three years to five years). More complex recommendations are tiered to identify steps in the process.



This report is also accompanied by a companion report that provides branding and marketing guidance to the community as well as resource media with all marketing graphics in a variety of formats.

1.2 Planning Process

The process for the plan began with a review of prior documents and plans for Camden including a prior tourism study conducted by the University of South Carolina, the community master plan, and others. The process continued with a detailed qualitative and quantitative analysis of the community.

- *Community Engagement:* The Consultants conducted a series of one-on-one interviews and roundtable meetings to gather stakeholder input from September 18-20, 2013. The community engagement continued throughout the project with additional interviews, roundtable groups, and public meetings. The consultants met with the Camden Business Alliance, the Camden Rotary Club, and conducted a workshop with the City Council during the process.
- *Retail Market Analysis:* The consultants conducted market research based on data derived from Nielsen Claritas as well as customer zip code visits recorded by local merchants.
- *Tourism Analysis:* The project team used the Regional Dynamics (REDYN) model for projecting existing a future tourism benchmarks. The REDYN model was combined with the state Parks Recreation and Tourism model for analysis to produce both a top down and bottom up analysis of the community.

From start to finish a steering committee and technical committee led the process. The steering committee dealt primarily with major policy issues while the technical committee provided coordination, data background, and staff coordination. The project team is grateful for the excellent input provided by both groups.

Steering Committee

Dennis Stuber, Kershaw County Committee of 100
Liza Van Horn, Camden Antiques Fair
Miciah Bennett, Chronicle-Independent
Sharon Hrabovsky, Camden House B&B
Bishop Thomas C. Bell, Cathedral of Praise Ministries
Kristen Cobb, Fine Arts Center of Kershaw County
Hope Cooper, National Steeplechase Museum
Brian Smith, Carolina Motorsports Park
Joanna Craig, Historic Camden
Liz Horton, Kershaw County Chamber of Commerce
Dr. Ernestyne Adams, African American History Committee
Jonathan Bazinet, Camden Business Alliance, Restaurateur
Creighton Miles, TenEleven Galleria
Rev. Ellis White, Camden First United Methodist Church
Joe Eason, Kershaw County Recreation Department
Patricia Richardson, Camden Business Alliance, Antiques Dealer

Technical Committee

Tony Scully, Mayor
Laurie M. Parks, Council Member



Wade Luther, Economic Development Director
Katherine Richardson, Camden Archives & Museum
Caitlin Corbett, Assistant to the City Manager
Ashley Hunter, McKay Public Affairs
Peggy McLean, Kershaw County Economic Development

1.3 Community Input

As mentioned before, Arnett Muldrow conducted a series of stakeholder roundtables, one-on-one interviews, presentations to associations, and public meetings with a variety of Camden stakeholders, including elected officials, retailers, and economic development, tourism, and hospitality professionals. As mentioned over 100 people participated in the input session. The following is a synopsis of community input. This list is not exhaustive and some opinions are not those of the Consulting Team or the City of Camden.

1.3.1 Strengths

Interviewees cited many community assets, such as:

- Horse culture and offerings
- History of the Community
- Historic Camden
- Archives
- Antiques
- Festivals and events
- Diversity of people and backgrounds
- Interstate access
- Destination for retirees
- Strong sense of identity
- Arts and culture
- Historic districts and neighborhoods
- South Carolina Equine Park
- Carolina Motorsports Park
- Price House
- Mills Courthouse
- Family-friendly community

1.3.2 Challenges

At the same time, interviewees explained that Camden faces several challenges, including:

- Lack of industry
- A political divide in the community
- River as dividing line in county
- Tired downtown with lack of a shared vision of its future
- Lack of accommodations to handle visitors
- Difficult interaction among groups and attractions
- Lack of a shared vision
- Not business-friendly



- Demographic split of haves and have nots
- Apathy in some quarters
- Loss of bus tours

1.3.3 Wants

Interviewees also described a number of opportunities Camden currently enjoys, including:

- Expanded equine services
- Improved recreational facilities
- Capitalize on river and lake
- Downtown hotel
- Strengthen brand identity
- “Third places” such as coffee shops and night spots
- Continued improvement of City and County cooperation
- Downtown road diet (yea and nay)
- Relationship with nearby state parks
- National Park status for Historic Camden
- Updated arena
- Continue to involve young professionals
- Sports tournaments

1.3.4 Threats

Interviewees were asked what poses possible threats to the community, and they responded with the following:

- Project funding
- Political divide
- Reaching critical mass
- Lack of vision for the future of the community
- Business retention
- Resistance to change
- What does Camden want to be?
- Business hours

1.3.5 Conclusion

This input provides a foundation from which to better understand the quantitative data gathered during the study. Overall, interviewees had mixed reviews for Camden. **While many expressed great pride in the history, beauty, and amenities of Camden others were discouraged about the decline of downtown, the political divide that is just now in the process of healing, and the silo mentality of groups that often pit one against another.** The interviewees generally felt that the community is now at a crossroads where a positive path forward, with clear recommendations will serve the community well and enhance its appeal to locals and visitors alike.



2. Retail Market Study

This section of the report presents the findings of the retail market research for Camden and sets the stage for further analysis that can be used to recruit business, help existing businesses target customers, and implement the accompanying implementation strategy in Chapter 4 of this report. The goal is to capitalize on Camden's potential retail trade and channel that into investments that sustain the city long-term.

This chapter is divided into four sections:

- Section 2.1 is Camden's market definition based on zip code survey work completed by businesses in the community. It also provides insight into Camden's trade area demographics and presents market data related to Camden's primary and secondary trade areas.
- Section 2.2 provides demographic profiles of Camden's primary and secondary trade areas. This section also presents a more detailed market segmentation using PRIZM® Lifestage characteristics (a product of Nielsen Claritas).
- Section 2.3 presents the retail market analysis that shows the amount of retail sales "leaking" from the primary and secondary trade areas. This information is based on the most recent data available and is a reliable source for understanding overall market patterns. This section concludes with some key opportunities for retail that could be used to both enhance existing businesses and recruit additional businesses to downtown.
- Section 2.4 summarizes Camden's current retail environment, and indicates market characteristics and trends that form the basis of the recommendations presented later in this report.

2.1 Market Definition

This portion of the study will explore what the market for downtown Camden looks like. Unlike radial and drive time studies that tend to use arbitrarily picked boundaries for customer trade zones, the method used for market definition in Camden is based on zip code survey work completed by cooperative merchants. Zip code surveys have their own limitations, as zip code geography can sometimes be fairly large and stretch beyond the typical market boundaries. However, it is the only technique that correlates easily with customer traffic collected by merchants. Recorded zip codes are used to define primary and secondary trade areas, which are then analyzed in terms of demographics and economic activity.

Seventeen Camden retail businesses graciously participated in the zip code survey of their customers conducted in September of 2013. Merchants were provided with a form to record customer zip codes and asked to keep the log for all customers during a week to ten-day period. In all, the businesses recorded 1,641 individual customer visits during the survey.

2.1.1 Zip Code Results

The results of the zip code survey are presented in Figures 1 and 2 and are summarized as follows:

- The Camden zip code 29020 had the most visits of any zip codes with thirty-nine percent of customers coming from this area.
- The Lugoff 29078 zip code produced the second highest number of recorded zip codes with just over nine percent of customers coming from here.

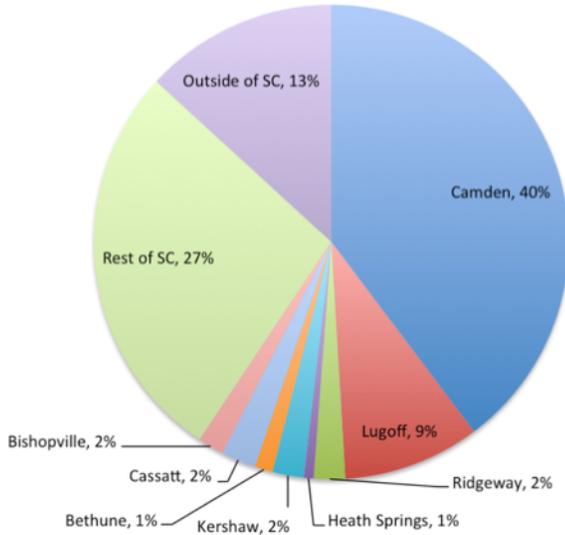


Figure 1: Customer Visits by Zip Code

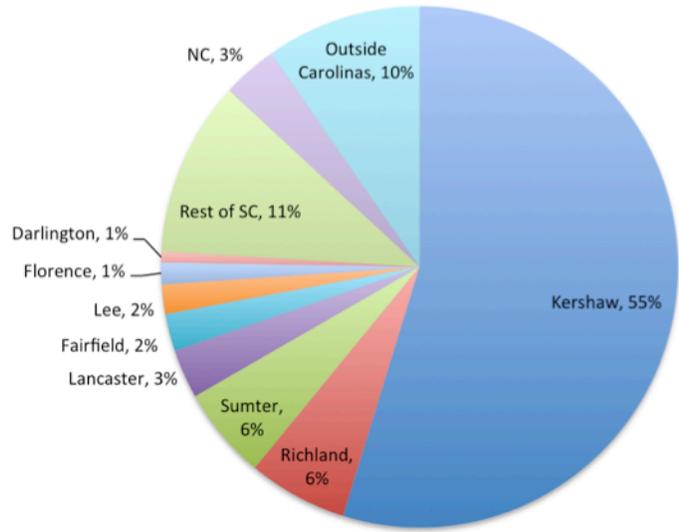


Figure 2: Customer Visits by County

- Nearby Bishopville 29010, Cassatt 29032, and Ridgeway 29130 each produced two percent of Camden’s customers.
- Other nearby zip codes (Bethune 29009, Heath Springs 29058, and Kershaw 29067) followed with each representing one percent of recorded visits.
- Customers from the rest of South Carolina accounted for twenty-seven percent of the overall visits recorded.
- Visitors from outside of South Carolina represented thirteen percent of recorded customers.
- At the county level, customers from Kershaw represented over half of the recorded visits at fifty-five percent.
- Richland and Sumter Counties had the next highest customer visits at six percent each.
- The counties of Lancaster, Fairfield, and Lee followed with three, two, and two percent of recorded visitors, respectively.
- Florence and Darlington Counties each produced one percent of the visits recorded.
- Combined, these local counties accounted for three-quarters, or seventy-six percent, of recorded customers while the rest of South Carolina accounted for eleven percent.
- Visitors from North Carolina represented three percent of customers.
- Customers from outside of the Carolinas accounted for ten percent of the overall recorded visits and are shown on the table to the right.

State	Recorded Visits
Georgia	20
Pennsylvania	16
Alabama	14
Michigan	14
Ohio	14
New York	12
Florida	7
Tennessee	7
Virginia	6
Connecticut	5
Indiana	5
Louisiana	4
Maryland	4
Mississippi	4
Texas	4
Washington	4
Kentucky	3
Nebraska	3
Arizona	2
New Hampshire	2
California	1
Washington, D.C.	1
Illinois	1
Massachusetts	1
New Jersey	1
Rhode Island	1
South Dakota	1
Wyoming	1
Grand Total	158

Table 1: Breakout of Out-of-Carolinas Visits.

2.1.2 Trade Area Definition

Although the number of visits provides an overall view of customer origin, a more accurate way to evaluate customer loyalty is to frame customer visits in the context of the population of each zip code. This method corrects for zip codes that have exceedingly large or small populations that might skew the market penetration data.



The primary trade area is the geography where the most loyal and frequent customers to Camden reside. The secondary trade area represents an area where Camden businesses can rely on customers, but to a lesser degree.

Table 2 shows customer visits per thousand residents; showing an index allows for an equal comparison of market penetration per zip code. It shows customer visits per thousand people for each of the highest representative visits to Camden. Determining the primary and secondary trade areas can sometimes be more “art” than science. At times, significant breaks in customer visits are not obvious. In Camden, this requires some interpretation, specifically between the secondary and tertiary break.

The primary trade area for Camden is solely composed of the Camden 29020 zip code, which is not surprising given the high percentages noted in Figures 1 and 2 above. Over twenty-eight visits per thousand came from the 29020 zip code, making it the most loyal customer base for Camden. This zip code includes the entirety of the City of Camden as well as a considerable stretch of land to the north, toward Lake Wateree. Highways SC 97 and US 601 make Camden highly accessible to the northern portion of the 29020 zip code, and these roads likely contribute to Camden 29020’s dominance as the most loyal and frequent customers to the City of Camden. Of course it must also be noted that the study area is located within this zip code, which will naturally generate retail activity because of the close proximity for residents.

Zip Code	Area	Population	Visits	Visits/1,000 Pop
29020	Camden	22,793	652	28.61
29078	Lugoff	16,425	153	9.32
29032	Cassatt	4,457	39	8.75
29009	Bethune	2,340	20	8.55
29130	Ridgeway	6,991	35	5.01
29128*	Rembert	5,866	22	3.75
29067	Kershaw	10,997	35	3.18
29010	Bishopville	13,885	29	2.09
29058	Heath Springs	5,315	11	2.07
29045	Elgin	23,398	33	1.41
29154*	Sumter	28,135	24	0.85
29206*	Columbia	17,788	13	0.73
29150*	Sumter	40,031	27	0.67
29102*	Manning	18,248	12	0.66
29205*	Columbia	24,822	15	0.60
29223*	Columbia	28,798	13	0.45
29212*	Columbia	50,141	21	0.42
29501*	Florence	43,220	15	0.35
Primary Trade Area		*Population estimates for 2013		
Secondary Trade Area				

Table 2: Recorded Customer Visits by Area Population (2012)

despite their close proximity. In other words, residents in nearby zip codes that can access roads feeding traffic directly into Camden shop in Camden more frequently; however, residents in equally nearby zip codes that can access I-20 more readily are choosing to shop elsewhere.

The secondary trade area is composed of three nearby zip codes, including Lugoff 29078, Cassatt 29032, and Bethune 29009. Each of these zip codes represents approximately nine visits per thousand for retail in Camden. Interestingly, these zip codes correlate with another transportation route, US 1. In conjunction with the observations made for the primary trade area, the linear nature of the secondary trade area would indicate that retail loyalty in Camden correlates with, not only proximity to Camden, but with available traffic routes as well. To elaborate, residents of the primary trade area Camden 29020, especially those in the northern portion of the area, have best access to two major roads, SC 97 and US 601. In the secondary trade area, US 1 is convenient to the majority of the land area. While I-20 does transect one of the zip codes in the secondary trade area, zip codes such as Rembert 29128 have best access to I-20 and are not shopping as frequently in Camden

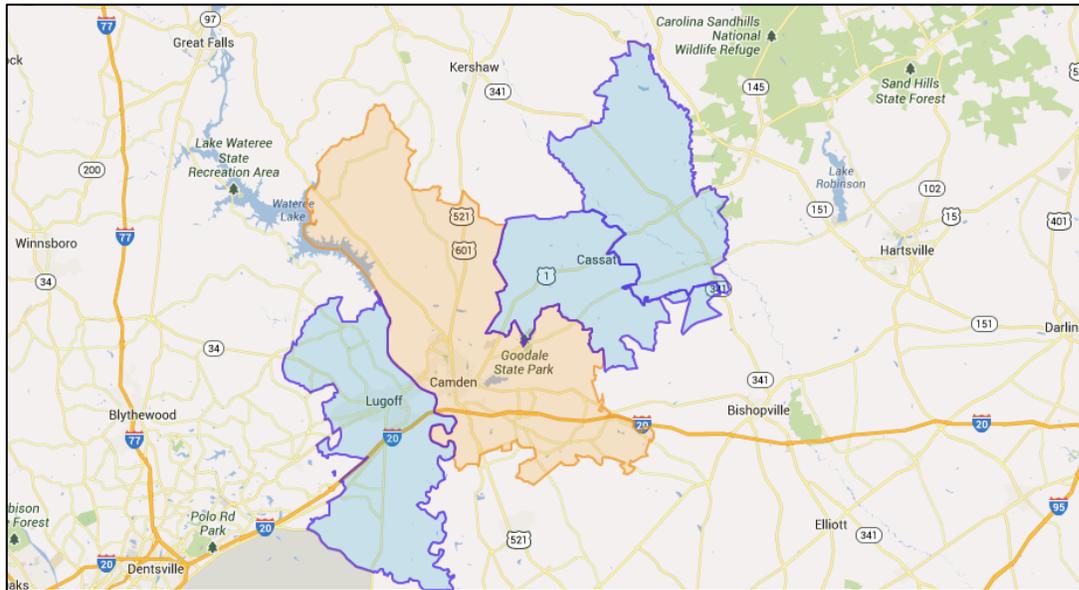


Figure 3: Camden's Primary (Orange) and Secondary (Blue) Trade Areas

Figure 3 on the previous page displays the extent of the primary and secondary trade areas for Camden with the aforementioned transportation routes. When viewed together, the secondary trade area is not contiguous but rather is bisected by the primary trade area. This visual of the combined trade area reiterates the linearity characterizing both the primary and secondary trade area in correlation with easily accessible highways.

2.2 Trade Area Demographics

In 2012, the population in Camden's primary trade area was 22,793. This population is expected to increase by 813, or 3.57 percent, to 23,606 people by 2017. The population in Camden's secondary trade area is expected to increase by 2,061 people, or 8.88% by 2017, indicating a slightly higher growth rate. Within the secondary trade area, Lugoff 29078 is expected to grow the most at a rate of 10.40 percent people between 2012 and 2017 with Cassatt 29032 and Bethune 29009 following respectively at 5.59 and 4.40 percent growth each. As identified in Figures 4 and 5, these trends are consistent with the majority of the counties adjacent to Kershaw County, with the exception of Fairfield, Lee, and Darlington Counties. The population growth of Lugoff and Elgin is significantly impacting the political, psychological, and demographic layout of Kershaw County. As a result of this shift in the last ten years, for the first time in its history, the population of the County east of the Wateree River is larger than that of the County west of the Wateree that includes Camden. Camden must remain relevant to these fast growing communities that are more affluent, are fast growing, and tend to identify as part of the metropolitan Columbia area rather than part of a "greater Camden."

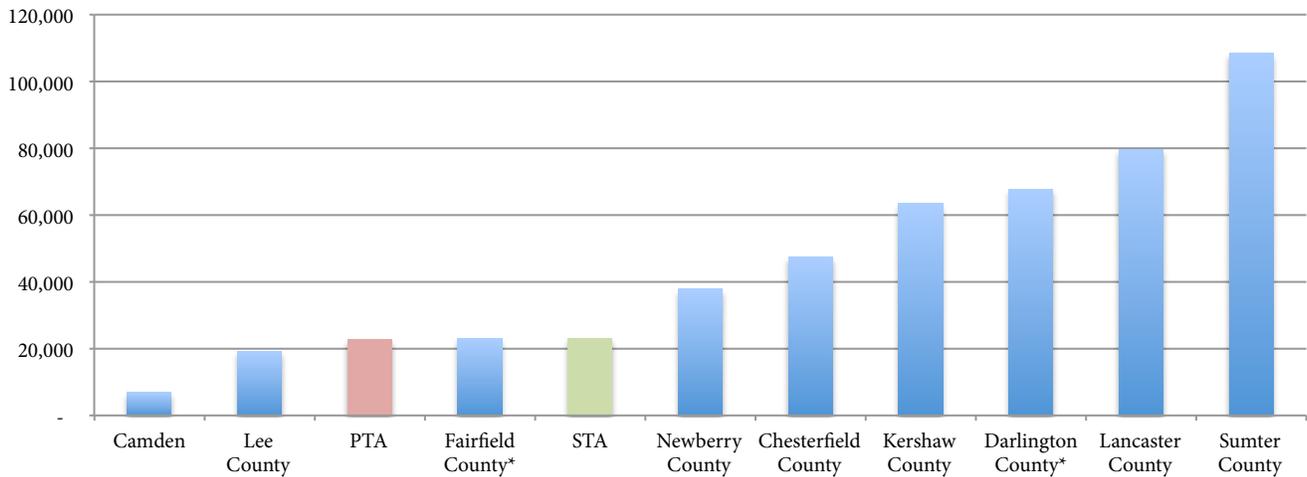


Figure 4: 2012 Trade Area Population (* indicates 2013 data)

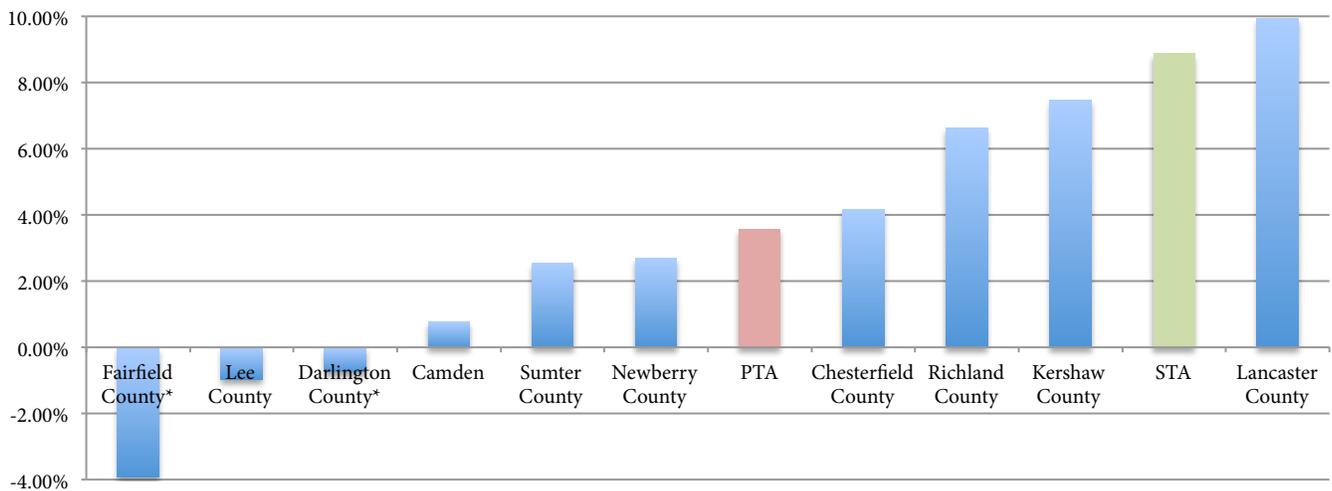


Figure 5: 2012-2017 Projected Trade Area Population Change (*indicates 2013-2018 data)

The expected population growth in the primary and secondary trade areas is encouraging for enhanced retail activity. The median ages identified in Figure 6, however, raise concern for the future of Camden’s retail climate. The City of Camden has the highest median age at 44.7 years. The primary trade area also ranks in the top half of the category at 42.0 years, and the secondary trade area comes in at a much lower 38.2 years. The relatively high median ages in Kershaw County and most of the adjacent counties may prove to be an obstacle for many types of retail recruitment, particularly stores that are attractive to young folks and families with children.

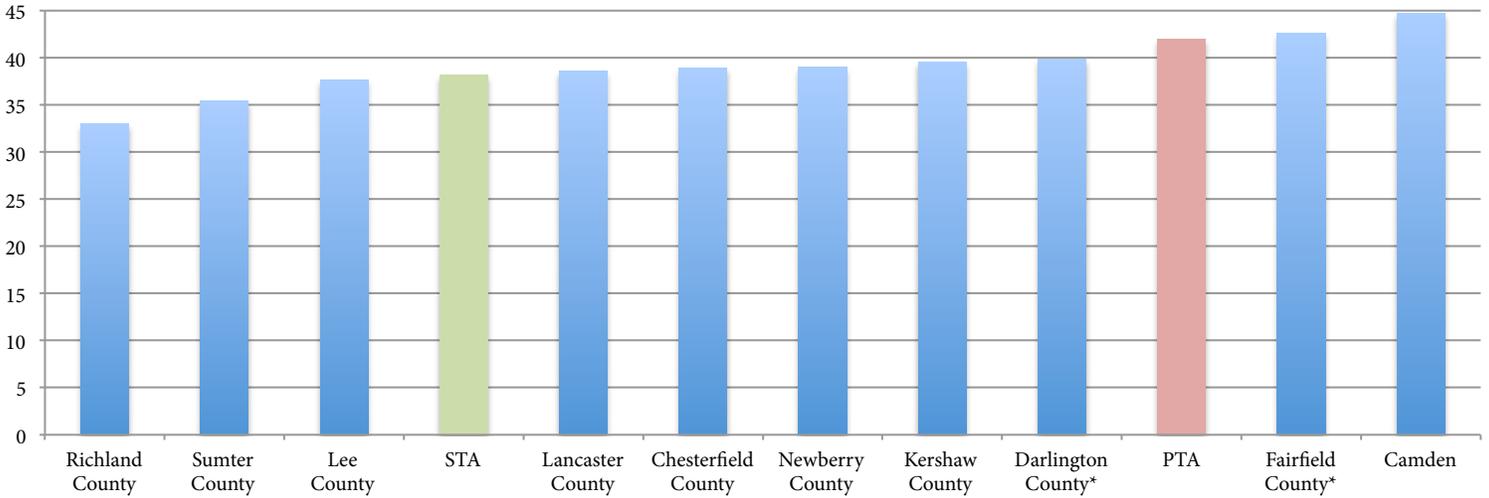


Figure 6: 2012 Estimated Median Age (*indicates 2013 data)

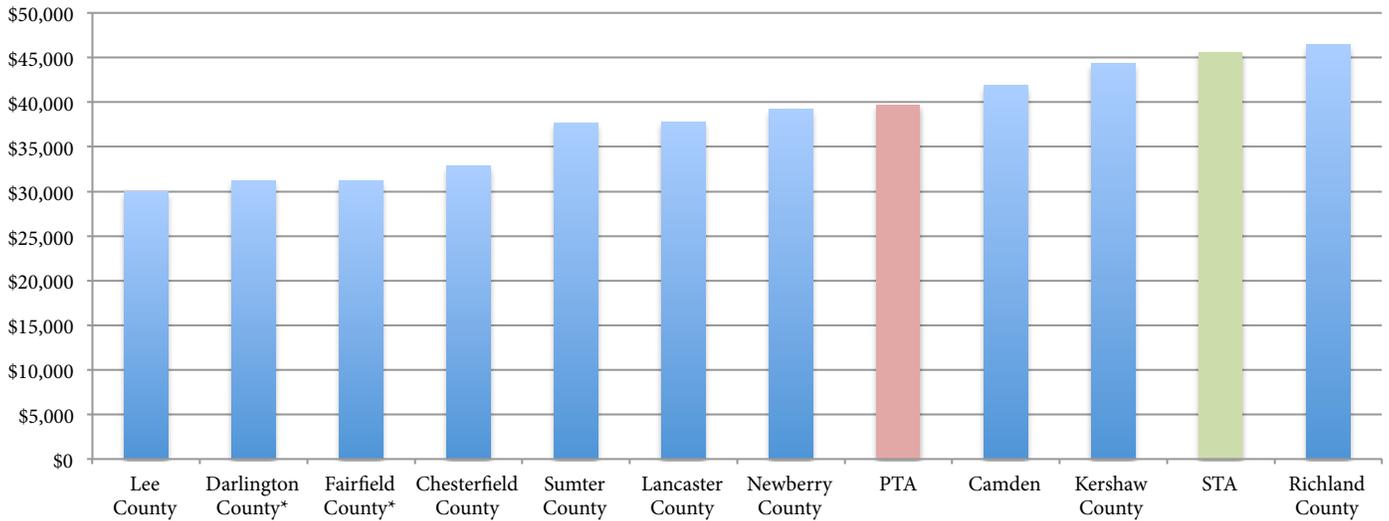


Figure 7: 2012 Median Household Income (*indicates 2013 data)

As Figure 7 above indicates, the median household income in the City of Camden as well as its primary and secondary trade areas is favorable. The City’s median income is \$41,863 with the secondary trade area and primary trade area reporting \$45,672 and \$39,740, respectively. Income is always a significant consideration for retail recruitment, so these figures are conducive to a healthy retail market.

2.3 Market Segmentation

Market segmentation summarizes demographic information into easy-to-understand categories. The market segmentation illustrated for Camden’s trade areas uses Claritas PRIZM data. PRIZM defines every U.S. household in terms of sixty-six demographic and behavioral types to help determine lifestyles, purchasing behaviors, and preferences of the customer base. These data are arranged into “Social,” “Lifestage,” and “Household” groups, each of which is detailed in Table 3.



2.3.1 PRIZM Social Group Segmentation

Claritas PRIZM provides insight into some of the shared social characteristics with its Social Group Segmentation categories shown in Figure 8. Major characteristics of the four PRIZM Social Groups represented in Camden’s primary trade area are described below. (Descriptions are provided by Nielsen Claritas.)

Rustic Living: 48% of Primary Trade Area

The six segments in Rustic America represent the nation's most isolated towns and rural villages. As a group, T4 residents have relatively modest incomes, low education levels, aging homes, and blue-collar occupations. Many of the residents, a mix of young singles and seniors, are unmarried, and they've watched scores of their neighbors migrate to the city. In their remote communities, these consumers spend their leisure time in such traditional small-town activities as fishing and hunting, attending social activities at the local church and veterans club, and enjoying country music and car racing.

Middle America: 27% of Primary Trade Area

The six segments in Middle America are filled with lower-middle-class homeowners living in small towns and remote exurbs. Typically found in scenic settings throughout the nation's heartland, Middle Americans tend to be white, high school educated, living as couples or larger families, and ranging in age from under 25 to over 65. Like many residents of remote communities, these conservative consumers tend to prefer traditional rural pursuits: fishing, hunting, making crafts, antique collecting, watching television, and meeting at civic and veterans clubs for recreation and companionship. Friday nights are for celebrating high school sports.

Country Comfort: 16% of Primary Trade Area

The five segments in Country Comfort are filled with predominantly white, upper-middle-class homeowners. In their placid towns and scenic bedroom communities, these Americans tend to be married, mostly between the ages of 25 and 54, with or without children. They enjoy comfortable upscale lifestyles, exhibiting high indices for barbecuing, bar-hopping, and playing golf as well as home-based activities such as gardening, woodworking, and crafts. Reflecting their rural, family environment, they prefer trucks, SUVs, and minivans to cars.

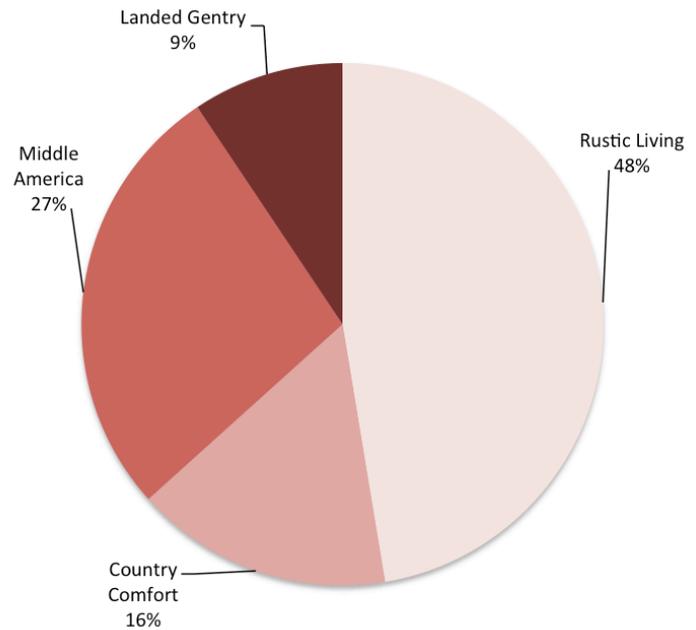


Figure 8: Primary Trade Area Social Group Segmentation



Landed Gentry: 9% of Primary Trade Area

Widely scattered throughout the nation, the five segments in the Landed Gentry social group consist of wealthy Americans who migrated to the smaller boomtowns beyond the nation's beltways. Many of the households contain Boomer families and couples with college degrees, expansive homes, and professional jobs--they're twice as likely as average Americans to telecommute. With their upscale incomes, they can afford to spend heavily on consumer electronics, wireless and computer technology, luxury cars, powerboats, books and magazines, children's toys, and exercise equipment.

2.3.2 PRIZM Lifestage Segmentation

In Camden, the primary trade area's share of the PRIZM Lifestage is skewed to an older population, as was indicated in the median age statistics reported in Figure 6. In Figure 9, the "Mature Years" category accounts for fifty-two percent of primary trade area households. The "Younger Life" category represents twenty-nine percent of Camden's primary trade area, and "Family Life" is trailing at nineteen percent. The age cohorts vary widely by subcategory and should be treated as general categorizations.

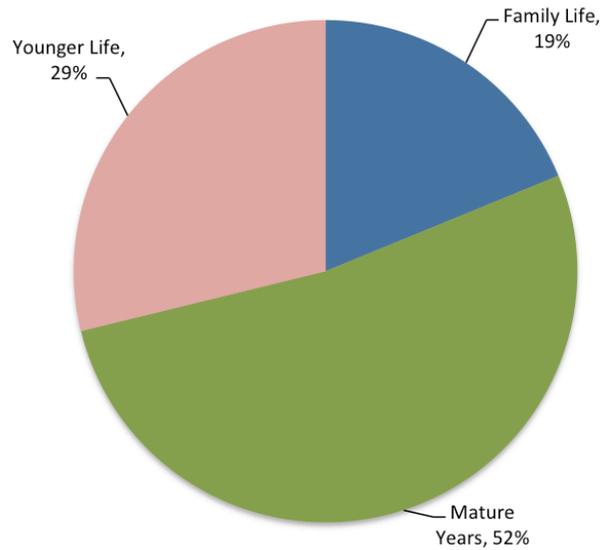


Figure 9: Primary Trade Area Lifestage Segmentation

2.3.3 PRIZM Household Segmentation

Figure 10 details all of the PRIZM segments included in the primary retail trade area. There are certain categories that only exist in urban markets and suburban markets that are not shown.

Each of the detailed descriptions below is provided by and paraphrased from Nielsen Claritas descriptions of their PRIZM Lifestyle Segmentation data. These descriptions are only provided for PRIZM household segments that index higher than that of the United States to show what segments are "unique" to Camden. The index method rates the segments against the United States with 100 being equal to the country and anything higher or lower less proportionate.

Old Milltowns: 12% of Primary Trade Area

America's once-thriving mining and manufacturing towns have aged--as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples, living on downscale incomes in pre-1960 homes and apartments. For leisure, they enjoy gardening, sewing, socializing at veterans clubs, or eating out at casual restaurants. For Camden this market segment represents an index of 907.2 making it both the largest individual segment in Camden and proportionately the most prevalent when compared to the United States.

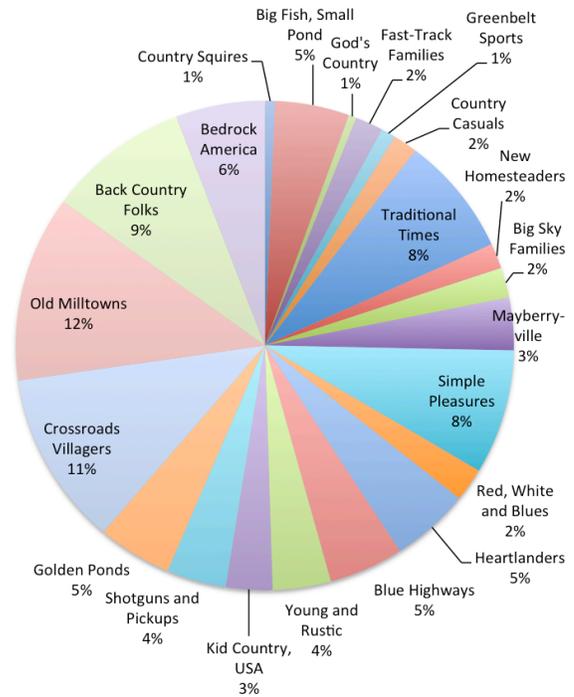


Figure 10: Primary Trade Area Household Segmentation

***Crossroads Villagers: 11% of Primary Trade Area***

With a population of white-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated, with downscale incomes and modest housing; one-quarter live in mobile homes. And there's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening, and hunting. The index for this category is 574.8 when compared to the United States.

Back Country Folks: 9% of Primary Trade Area

Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 65 years old, and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape. The index for this category is 413.1 when compared to the United States.

Simple Pleasures: 8% of Primary Trade Area

With many of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement. And a disproportionate number served in the military, so many residents are members of veterans clubs. The index for this category is 376.1 when compared to the United States.

Traditional Times: 8% of Primary Trade Area

Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these upper-middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles like Country Living and Country Home. But they're big travelers, especially in recreational vehicles and campers. The index for this category is 294.1 when compared to the United States.

Bedrock America: 6% of Primary Trade Area

Bedrock America consists of economically challenged families in small, isolated towns located throughout the nation's heartland. With modest educations, sprawling families, and service jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three haven't finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking, and camping. The index for this category is 339.4 when compared to the United States.

Big Fish Small Pond: 5% of Primary Trade Area

Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, including belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology. The index for this category is 224.4 when compared to the United States.

Heartlanders: 5% of Primary Trade Area

America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of older couples with white-collar jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders residents pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping, and boating. The index for this category is 266.5 when compared to the United States.

Blue Highways: 5% of Primary Trade Area

On maps, Blue Highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class residents who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish, the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert. The index for this category is 292.6 when compared to the United States.

***Golden Ponds: 5% of Primary Trade Area***

Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than \$35,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo, and doing craft projects. The index for this category is 324.8 when compared to the United States.

Young and Rustic: 4% of Primary Trade Area

Young & Rustic is composed of middle-aged, restless singles. These folks tend to be lower-middle-income, high school-educated, and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars, and dating. The index for this category is 203.3 when compared to the United States.

Shotguns and Pickups: 4% of Primary Trade Area

The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These Americans tend to be young, working-class couples with large families, living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than anywhere else in the nation. The index for this category is 243.3 when compared to the United States.

Kid Country, USA: 3% of Primary Trade Area

Widely scattered throughout the nation's heartland, Kid Country, USA is a segment dominated by large families living in small towns. Predominantly white, with an above-average concentration of Hispanics, these young, working-class households include homeowners, renters, and military personnel living in base housing; about 16 percent of residents own mobile homes. The index for this category is 247.9 when compared to the United States.

Mayberry-ville: 3% of Primary Trade Area

Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, upper-middle-class couples like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles, and pickup trucks. The index for this category is 148.6 when compared to the United States.

Red, White, and Blues: 2% of Primary Trade Area

The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Walmart, Radio Shack, and Payless Shoes. Middle-aged, high school-educated, and lower-middle-class, these folks are transitioning from blue-collar jobs to the service industry. The index for this category is 223.8 when compared to the United States.

Country Squires: 1% of Primary Trade Area

The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who've fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis, and swimming, as well as skiing, boating, and biking. This category is included although it indexes at only 36.2 when compared with the United States.

The market segmentation is revealing in several ways. First, many of the highest indexing categories represent some of the less affluent market segments, many skew older in their age categories, and those that are affluent represent a relatively small proportion of the households in the market.



2.4 Retail Market Analysis

In this section, the Camden retail market will be examined to identify potential opportunities for new or expanded stores by exploring “retail leakage.” This will allow the community to assess what kind of additional stores might be attracted to Camden and will help individual existing businesses understand how they might diversify product lines.

2.4.1 Retail Leakage in the Trade Areas

Retail leakage refers to the difference between the retail expenditures by residents living in a particular area and the retail sales produced by stores located in the same area. If desired products are not available within that area, consumers will travel to other places or use different methods to obtain those products. Consequently, the dollars spent outside of the area are said to be “leaking.” If a community is a major retail center with a variety of stores it will be “attracting” rather than “leaking” retail sales. Even large communities may see leakage in certain retail categories while some small communities may be attractors in other categories.

Such an analysis is not an exact science. In some cases, large outflow may indicate that money is being spent elsewhere (drug store purchases at Wal-Mart or apparel purchases through the internet). It is important to note that this analysis accounts best for retail categories where households (as opposed to businesses) are essentially the only consumer groups. For example, lumberyards may have business sales that are not accounted for in consumer expenditures. Stores such as jewelry shops and clothing stores are more accurately analyzed using this technique.

The leakage study for Camden is a “snapshot” in time. Consequently, there are factors that point to this being a more conservative or more aggressive look at retail potential depending on what factors are examined. For example, new residential development would mean that there would be more customers in the future resulting in greater demand for certain retail categories.

However, this leakage study only examines the primary and secondary trade areas identified for Camden. A successful store model might capture from well beyond this geography and could foster a strong visitor market as well. In Camden’s primary trade area (29020 zip code), selected store sales equaled \$377 million in 2012. Consumers in the same area spent \$313 million in 2012, meaning \$64 million entered the primary trade area. This overall importation of dollars is happening in only two major retail categories: Gasoline Stations and General Merchandise stores (at an astounding \$82 million). While many may lament the big box retailers in Camden, they are doing an excellent job of attracting customers from outside of the primary trade area. In their absence Camden would leak retail sales. The opportunity for Camden is to attract the regional resident visiting a big box store into downtown and the visitor stopping for gasoline to do the same.

Camden’s secondary trade area (the 29078, 29032, and 29009 zip codes) generated \$268 million in sales, but consumers in the secondary trade area spent \$326 million. This indicates that \$56 left the secondary trade area in 2012.

When combined, Camden’s primary and secondary trade areas form a \$638 million consumer market, of which nearly \$7 million is coming from other communities (outside of the 29020, 29078, 29032, and 29009 zip codes).

2.4.2 Detailed Retail Market Opportunity Tables

Table 3 details the individual retail categories in which Camden is leaking and gaining sales in both the primary and secondary trade areas. This data should be used as an overall guide to retail market potential and should not substitute detailed market research on the part of any business wishing to open in the area. The left-hand column indicates retail store types along with North American Industrial Classification System (NAICS) codes for these stores. Please note that some categories are subsets of larger categories. The other columns represent the consumer demand in Camden’s trade areas. Red numbers indicate an inflow of dollars and black numbers indicate market leakage.



Opportunity Gap - Retail Stores	PTA			STA			COMBINED		
	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)	(Consumer Expenditures)	(Retail Sales)	Leakage (Inflow)
Total Retail Sales Incl Eating and Drinking Places	312,553,912	377,083,025	-64,529,113	325,629,866	268,073,515	57,556,351	638,183,778	645,156,540	(6,972,762)
Motor Vehicle and Parts Dealers-441	55,358,163	18,753,207	36,604,956	58,533,788	98,786,890	-40,253,102	113,891,951	117,540,097	(3,648,146)
Automotive Dealers-4411	46,234,699	12,982,335	33,252,364	48,881,657	94,933,735	-46,052,078	95,116,356	107,916,070	(12,799,714)
Other Motor Vehicle Dealers-4412	5,335,506	540,357	4,795,149	5,632,830	1,040,052	4,592,778	10,968,336	1,580,409	9,387,927
Automotive Parts/Accsrs, Tire Stores-4413	3,787,958	5,230,515	-1,442,557	4,019,301	2,813,103	1,206,198	7,807,259	8,043,618	(236,359)
Furniture and Home Furnishings Stores-442	5,968,703	1,720,809	4,247,894	6,082,649	149,882	5,932,767	12,051,352	1,870,691	10,180,661
Furniture Stores-4421	3,190,938	1,464,101	1,726,837	3,229,601	65,070	3,164,531	6,420,539	1,529,171	4,891,368
Home Furnishing Stores-4422	2,777,765	256,708	2,521,057	2,853,048	84,812	2,768,236	5,630,813	341,520	5,289,293
Electronics and Appliance Stores-443	6,423,421	5,626,535	796,886	6,716,237	1,128,951	5,587,286	13,139,658	6,755,486	6,384,172
Appliances, TVs, Electronics Stores-44311	4,764,430	5,009,155	-244,725	4,968,987	1,128,951	3,840,036	9,733,417	6,138,106	3,595,311
Household Appliances Stores-443111	1,166,949	613,297	553,652	1,208,492	613,297	595,195	2,375,441	1,226,594	1,148,847
Radio, Television, Electronics Stores-443112	3,597,481	4,395,858	-798,377	3,760,495	515,654	3,244,841	7,357,976	4,911,512	2,446,464
Computer and Software Stores-44312	1,371,062	617,380	753,682	1,435,943	0	1,435,943	2,807,005	6,370,000	2,189,625
Camera and Photographic Equipment Stores-44313	287,929	0	287,929	311,307	0	311,307	599,236	0	599,236
Building Material, Garden Equip Stores-444	28,752,341	35,731,635	-6,979,294	29,926,947	28,387,719	1,539,228	58,679,288	64,119,354	(5,440,066)
Building Material and Supply Dealers-4441	25,794,024	35,731,635	-9,937,611	26,806,794	15,391,305	11,415,489	52,600,818	51,122,940	1,477,878
Home Centers-44411	10,332,658	6,982,867	3,349,791	10,709,912	0	10,709,912	21,042,570	6,982,867	14,059,703
Paint and Wallpaper Stores-44412	631,285	77,053	554,232	650,058	0	650,058	1,281,343	77,053	1,204,290
Hardware Stores-44413	2,590,049	68,276	2,521,773	2,710,543	1,796,937	913,606	5,300,592	1,865,213	3,435,379
Other Building Materials Dealers-44419	12,240,032	28,603,439	-16,363,407	12,736,281	13,594,368	-858,087	24,976,313	42,197,807	(17,221,494)
Building Materials, Lumberyards-444191	4,632,886	11,183,954	-6,551,068	4,894,965	5,315,403	-420,438	9,527,851	16,499,357	(6,971,506)
Lawn, Garden Equipment, Supplies Stores-4442	2,958,317	0	2,958,317	3,120,153	12,996,414	-9,876,261	6,078,470	12,996,414	(6,917,944)
Outdoor Power Equipment Stores-44421	619,302	0	619,302	651,337	0	651,337	1,270,639	0	1,270,639
Nursery and Garden Centers-44422	2,339,015	0	2,339,015	2,468,816	12,996,414	-10,527,598	4,807,831	12,996,414	(8,188,583)
Food and Beverage Stores-445	40,605,900	46,225,060	-5,619,160	41,969,008	16,868,869	25,100,139	82,574,908	63,093,929	19,480,979
Grocery Stores-4451	37,277,494	41,653,247	-4,375,753	38,515,267	14,204,908	24,310,359	75,792,761	55,858,155	19,934,606
Supermarkets, Grocery (Ex Conv) Stores-44511	35,423,902	40,550,695	-5,126,793	36,543,930	12,890,627	23,653,303	71,967,832	53,441,322	18,526,510
Convenience Stores-44512	1,853,592	1,102,552	751,040	1,971,337	1,314,281	657,056	3,824,929	2,416,833	1,408,096
Specialty Food Stores-4452	1,143,638	121,854	1,021,784	1,188,008	1,604,446	-416,438	2,331,646	1,726,300	605,346
Beer, Wine and Liquor Stores-4453	2,184,768	4,449,959	-2,265,191	2,265,733	1,059,515	1,206,218	4,450,501	5,509,474	(1,058,973)
Health and Personal Care Stores-446	22,136,925	28,801,400	-6,664,475	20,950,044	2,835,256	18,114,788	43,086,969	31,636,656	11,450,313
Pharmacies and Drug Stores-44611	19,269,634	26,732,416	-7,462,782	18,179,582	2,835,256	15,344,326	37,449,216	29,567,672	7,881,544
Cosmetics, Beauty Supplies, Perfume Stores	821,364	995,470	-174,106	765,939	0	765,939	1,587,303	995,470	591,833
Optical Goods Stores-44613	617,735	166,614	451,121	656,747	0	656,747	1,274,482	166,614	1,107,868
Other Health and Personal Care Stores-44619	1,428,192	906,900	521,292	1,347,776	0	1,347,776	2,775,968	906,900	1,869,068
Gasoline Stations-447	31,806,364	78,656,307	-46,849,943	33,600,550	65,194,338	-31,593,788	65,406,914	143,850,645	(78,443,731)
Gasoline Stations With Conv Stores-44711	23,705,460	73,923,306	-50,217,846	25,099,346	36,999,628	-11,900,282	48,804,806	110,922,934	(62,118,128)
Other Gasoline Stations-44719	8,100,904	4,733,001	3,367,903	8,501,204	28,194,710	-19,693,506	16,602,108	32,927,711	(16,325,603)
Clothing and Clothing Accessories Stores-448	13,683,500	7,711,319	5,972,181	14,684,948	1,036,628	13,648,320	28,368,448	8,747,947	19,620,501
Clothing Stores-4481	9,769,903	6,640,000	3,129,903	10,642,038	730,535	9,911,503	20,411,941	7,370,535	13,041,406
Men's Clothing Stores-44811	592,371	358,279	234,092	631,940	0	631,940	1,024,311	358,279	666,032
Women's Clothing Stores-44812	2,459,837	5,623,912	-3,164,075	2,696,591	511,263	2,185,328	5,156,428	6,135,175	(978,747)
Childrens, Infants Clothing Stores-44813	597,124	0	597,124	664,198	0	664,198	1,261,322	0	1,261,322
Family Clothing Stores-44814	5,222,120	0	5,222,120	5,679,977	0	5,679,977	10,902,097	0	10,902,097
Clothing Accessories Stores-44815	230,710	0	230,710	249,279	0	249,279	479,989	0	479,989
Other Clothing Stores-44819	667,741	657,809	9,932	720,053	219,272	500,781	1,387,794	877,081	510,713
Shoe Stores-4482	2,007,258	0	2,007,258	2,178,096	0	2,178,096	4,185,354	0	4,185,354
Jewelry, Luggage, Leather Goods Stores-4483	1,906,339	1,071,319	835,020	1,864,814	306,093	1,558,721	3,771,153	1,377,412	2,393,741
Jewelry Stores-44831	1,750,669	1,071,319	679,350	1,699,079	306,093	1,392,986	3,449,748	1,377,412	2,072,336
Luggage and Leather Goods Stores-44832	155,670	0	155,670	165,735	0	165,735	321,405	0	321,405
Sporting Goods, Hobby, Book, Music Stores-451	5,804,734	3,769,987	2,034,747	6,208,640	1,334,316	4,874,324	12,013,374	5,104,303	6,909,071
Sporting Goods, Hobby, Musical Inst Stores-4511	4,257,880	2,259,842	1,998,038	4,511,511	1,334,316	3,177,195	8,769,391	3,594,158	5,175,233
Sporting Goods Stores-45111	2,093,149	1,579,886	513,263	2,247,920	804,996	1,442,924	4,341,069	2,384,882	1,956,187
Hobby, Toys and Games Stores-45112	1,423,210	626,847	796,363	1,492,020	208,947	1,283,073	2,915,230	835,794	2,079,436
Sew/Needlework/Piece Goods Stores-45113	381,765	0	381,765	394,907	293,818	101,089	776,672	293,818	482,854
Musical Instrument and Supplies Stores-45114	359,756	53,109	306,647	376,664	26,555	350,109	736,420	79,664	656,756
Book, Periodical and Music Stores-4512	1,546,854	1,510,145	36,709	1,697,129	0	1,697,129	3,243,983	1,510,145	1,733,838
Book Stores and News Dealers-45121	1,009,648	415,008	594,640	1,131,861	0	1,131,861	2,141,509	415,008	1,726,501
Book Stores-451211	944,727	415,008	529,719	1,061,575	0	1,061,575	2,006,302	415,008	1,591,294
News Dealers and Newsstands-451212	64,921	0	64,921	70,286	0	70,286	135,207	0	135,207
Prerecorded Tapes, CDs, Record Stores-45122	537,206	1,095,137	-557,931	565,268	0	565,268	1,102,474	1,095,137	7,337
General Merchandise Stores-452	41,571,439	124,123,118	-82,551,679	43,257,253	23,166,139	20,091,114	84,828,692	147,289,257	(62,460,565)
Department Stores Excl Leased Depts-4521	20,157,371	64,965,305	-44,807,934	21,075,633	0	21,075,633	41,233,004	64,965,305	(23,732,301)
Other General Merchandise Stores-4529	21,414,068	59,157,813	-37,743,745	22,181,620	23,166,139	-984,519	43,595,688	82,323,952	(38,728,264)
Miscellaneous Store Retailers-453	8,314,450	14,638,914	-6,324,464	9,006,740	5,023,743	3,982,997	17,321,190	19,662,657	(2,341,467)
Florists-4531	601,607	281,289	320,318	620,976	241,116	379,860	1,222,583	522,405	700,178
Office Supplies, Stationery, Gift Stores-4532	3,075,471	3,754,213	-678,742	3,240,941	934,393	2,306,548	6,316,412	4,688,606	1,627,806
Office Supplies and Stationery Stores-45321	1,729,914	3,203,141	-1,473,227	1,821,652	0	1,821,652	3,551,566	3,203,141	348,425
Gift, Novelty and Souvenir Stores-45322	1,345,557	551,072	794,485	1,419,289	934,393	484,896	2,764,846	1,485,465	1,279,381
Used Merchandise Stores-4533	626,485	3,769,490	-3,143,005	675,472	203,758	471,714	1,301,957	3,973,248	(2,671,291)
Other Miscellaneous Store Retailers-4539	4,010,887	6,833,922	-2,823,035	4,469,351	3,644,476	824,875	8,480,238	10,478,398	(1,998,160)
Non-Store Retailers-454	24,094,121	526,052	23,568,069	24,494,991	150,300	24,344,691	48,589,112	676,352	47,912,760
Foodservice and Drinking Places-722	28,033,851	10,798,682	17,235,169	30,198,071	24,010,484	6,187,587	58,231,922	34,809,166	23,422,756
Full-Service Restaurants-7221	12,493,623	6,613,972	5,879,651	13,463,708	3,885,483	9,578,225	25,957,331	10,499,455	15,457,876
Limited-Service Eating Places-7222	11,917,474	0	11,917,474	12,858,125	19,979,770	-7,121,645	24,775,599	19,979,770	4,795,829
Special Foodservices-7223	2,347,834	4,029,704	-1,681,870						



2.4.3 Per Capita Retail Activity

To understand the relative strength of Camden's retail market, it is helpful to compare retail sales and expenditures to those of other Midlands South Carolina communities. As the trade areas for these nearby communities are undetermined, a county-to-county comparison provides the best "apples-to-apples" look at consumer spending data. The per capita retail data displayed in Table 4 are summarized as follows:

- The primary trade area per capita consumer demand is comparable to that of surrounding communities. The primary trade area expended \$13,713 in 2012 per capita while six adjacent counties, including Richland County, Kershaw County, Fairfield County, Newberry County, Darlington County, and Lancaster County, fell within a \$1,000 range of the primary trade area's per capita demand.
- The secondary trade area topped the rankings in per capita demand at \$14,022 expended in 2012. Lee County ranked at the bottom with \$10,474 spent in 2012 per capita.
- In 2012 retail sales per capita, the primary trade area beat all of the other geographies with \$16,544 spent in 2012. This number outranks even Richland County (\$13,576 retail sales per capita), which may have had an expected advantage given its considerably larger population. The secondary trade area followed behind Richland County, showing \$11,544 in per capita sales in 2012.
- Overall, these numbers indicate that the primary trade area is bringing in money from retail sales, and it is likely that some of this inflow is coming from the secondary trade area, which is leaking money.

Geography	2012 Population	2012 Retail Sales	2012 Per Capita Sales	2012 Demand	2012 Per Capita Demand
PTA	22,793	\$377,083,025	\$16,544	\$312,553,912	\$13,713
Richland County	393,967	\$5,348,415,961	\$13,576	\$5,344,012,082	\$13,565
STA	23,222	\$268,073,515	\$11,544	\$325,629,866	\$14,022
Kershaw County	63,419	\$718,563,206	\$11,330	\$883,111,565	\$13,925
Fairfield County	23,100	\$251,894,235	\$10,905	\$297,818,830	\$12,893
Sumter County	108,431	\$1,143,658,469	\$10,547	\$1,352,984,671	\$12,478
Newberry County	37,871	\$387,257,271	\$10,226	\$518,276,187	\$13,685
Darlington County	67,800	\$606,575,503	\$8,947	\$883,448,473	\$13,030
Chesterfield County	47,444	\$413,087,814	\$8,707	\$586,280,689	\$12,357
Lee County	19,148	\$152,367,269	\$7,957	\$200,548,207	\$10,474
Lancaster County	79,528	\$577,603,055	\$7,263	\$1,049,193,639	\$13,193

Table 4: 2012 Per Capita Retail Sales and Demand by County

2.4.4 Key Market Opportunities

The retail market potential for Camden combines many different facts of the data gathered above. Not simply a collection of numbers, retail markets depend on both quantitative and qualitative information. Moreover, just because there is retail market potential for a possible retail store type in no way ensures the success of that store type in the community. There are many reasons why a business might succeed or fail and the retail market is but one of those factors. However, this does provide a synopsis guide for the "best potential" retail opportunities in Camden. These market opportunities are as follows:



- *Furniture and Home Furnishings Stores:* There is a \$4.2 million and a \$5.93 million gap in the primary and secondary trade areas, respectively. As with some other categories, furniture stores work well as a cluster that can even outstrip local demand. A conservative capture scenario suggests demand of up to 10,000 square feet in this category.
- *Clothing and Clothing Accessories Stores:* The primary trade area is leaking \$5.97 million out of the community, and the secondary trade area echoes this untapped demand with \$13.65 million going to other geographies. Family clothing stores and shoe stores hold the most potential for success in Camden within this category. A conservative capture scenario suggests demand of up to 12,000 square feet in this category.
- *Food Service and Drinking Places:* Camden's primary trade area is missing out on \$5.8 million in full-service restaurants, \$11.92 million in limited-service restaurants, and \$1.12 million in drinking places. These missed opportunities, combined with inflow from special food services, yield an overall food services "deficit" of \$17.23 million in the primary trade area. The secondary trade area contributes another \$6.19 million in leakage. As with furnishings, restaurants present a clustering opportunity. A conservative capture scenario suggests demand of up to 17,500 square feet in this category.

2.4.5 Overall Observations and Conclusions

Based on the above findings, Camden has the opportunity to expand its retail offerings in several NAICS categories. Needless to say, any retail expansion in Camden is likely to involve the concerted effort of the public and private sectors. The following conclusions will form the basis of the recommendations to follow in Chapter Three of this report.

- Overall, Camden is a relatively healthy retail market, relying on the customer base along SC 97, US 601, and US 1, which help shape the primary and secondary trade areas.
- A key challenge for Camden is demographic. While the local population is predicted to increase slightly and the median income is favorable, retail growth and expansion will largely depend on an even larger population with demographic traits favorable to larger retailers.
- Marketing and recruitment efforts should focus on both local and visitor markets, noting that different messages and tools will be required to do this well. For example, seventy-five percent of the primary trade area is made up of Rustic Living and Middle America cohorts, who prefer a more modest lifestyle and spend more conservatively. This is a population that should be actively pursued through marketing efforts that are likely to be different than those designed to retain out-of-town visitors, such as those in the equine or motorsports industries, who may spend differently.
- Although Camden's retail is largely supported by the local market, ample opportunity exists to capture spending from visitors traveling along I-20. Appropriate marketing and branding strategies derived later in this study can aid in this effort.
- Right now, opportunities exist for new and expanded offerings in several retail categories, most notably restaurants, furniture, and clothing.



3. Recommendations

The recommendations for Camden are divided into four themes outlined below. Each theme specifically addresses a key objective to promote a stronger tourism economy for Camden. In many instances, the overall themes overlap one another and should be worked on simultaneously and in a collaborative manner. For each theme, the issues and strategy related to the theme is introduced and specific recommendations follow in **bold type**. At the conclusion of each recommendation a time frame for implementation and a key partner for implementing the recommendation. The time frames are for the completion of the recommendation and are generally divided into three tiers: within 6 months, within 1 year, and within 2 years. It is imperative that each of these recommendations be viewed as a partnership among different groups in order for this plan to be successful.

3.1 Branding and Marketing

3.1.1 Issues and Strategy

As mentioned earlier, the results of the zip code survey indicate a mixture of local customers, regional customers, and visitors to Camden. Visitor attractions in general had less thorough zip code data so there's not corroborating data to indicate how attractions are truly driving traffic to merchants and restaurants in Camden. However, the retail and restaurant data alone points to a multi-pronged marketing strategy: local, regional, and outside of region. This should be undertaken with a deliberate approach outlined below.

A critical issue for Camden is that the community is still working with multiple images (typefaces and logos) throughout the community with very little consistency. The most recent "Grab Life" campaign has merit but evolved into a political debate and does not necessarily have the expansion capability of other campaigns. "History, horses, and hospitality" is still used on some banners and publications but is limiting in showcasing everything Camden has to offer, reinforces old stereotypes, and is now being used by Aiken, South Carolina less than two hours away. The timing of a fresh branding *system* is now. It should be expandable, broad, and authentic.

By using a system, Camden can address another serious issue. In many cases each attraction, event, shop, district, restaurant, museum, and activity is left to its own devices to market itself. This "Silo" marketing strategy erodes the overall image of Camden, fails to leverage the strength of aggregating activities, is a highly inefficient use of funds, and most importantly has fomented unhealthy competition among groups who should be working together to market the community. As a result the strategy for the marketing and branding campaign should be:

Camden will leverage its assets, both internal and external, public and private, to promote the community as a destination.

3.1.2 Branding and Marketing Recommendations

Launch Brand Identity for Camden

A key component of this project is a brand identity system. A separate branding report accompanies this report and provides all of the branding recommendations.



We are Camden, a place surrounded by history. Long a home of Native Americans, we were founded not long after Carolina was separated into North and South. Here, King Hagler, the Catawba Chief, worked for peace among natives and colonists along the banks of the Wateree. Here, Patriots suffered one of the worse defeats in the Revolutionary War. Yet from this place, the tide of war would turn and ultimately lead to victory for a fledgling nation built on ideals of equality, freedom, and hope.

We are a place of beauty where the land provides for equestrian and hunting lifestyles that have attracted people here for two hundred years. Many of us may never ride a horse, but we are all inspired by the classic grace and strength of this noble creature, which has been and remains a symbol for our community.

We are a place where the Winter Colony brought people from across the nation to Carolina, where they could enjoy life with kind and gracious people. We are a place where memories of a horse race, sometimes hazy, become the first experience of young people making a lifelong connection to South Carolina.

Like the great Palmetto State, we are a place of many walks of life: young and old, black and white, native-born and from places far away. And yet, it is here we have chosen to call home. Here, where the stories of centuries past still echo in our ears. Here, where living is comfortable and easy. Here, where the future offers opportunity and potential.

*We invite you to experience the pace of South Carolina's oldest inland city. We beckon you to discover the warmth of our diverse cultures. We welcome you to discover the place we call home.
We are Camden: Classically Carolina.*

Brand control is essential throughout the life of a brand system but particularly in the early implementation stages of a brand launch.

Time frame: Within 6 months. Key partners: Economic Development Office, Chamber of Commerce, Camden Business Alliance, Main Street Camden (mentioned later), other partners.



Figure 11: Primary Community Brand.

***Enhanced online/mobile presence.***

Currently the City of Camden has an excellent website with easy access to visitor information about the community. In fact, the website profiles the visitor experience as the “landing page” for the community. The City should launch ClassicallyCarolina.com, which has already been secured as a visitor page for the community. The new domain will allow the community to track visitation from a “zero” starting point. For the short term, the domain can redirect to the City’s web page. Over time, the site should stand-alone as its own visitor oriented destination for the community. As the community establishes a distinct visitor website, it should deploy it as a mobile friendly website. Visitors are very unlikely to download a visitor “app” but will be looking for an easy way to use their mobile browsers to explore Camden, a mobile friendly edition of the site will be essential. Such a site with mobile functions will allow Camden to showcase shopping, dining, historic tours, and interest themes such as African American History or Equestrian Attractions.

Time frame: Launch and redirect within 6 months. Establish independent site within one year. Establish mobile friendly site within one year. Key partner: Tourism Director.

Revised publication pieces.

Existing publications pieces promoting Camden are inconsistent, some are very out of date, and none provide a clear visitor guide to the community. Camden should launch a revised visitor guide that provides a comprehensive overview of visitor amenities to the community. It should focus on themes such as: recreation, history and architecture, shopping and dining, accommodations, African American history, and the equestrian experiences. Events and a master calendar should also be included. This should be an annually produced publication.

Time frame: Produce new publication within one year. Key partner: Tourism Director with possible Chamber of Commerce collaboration.

Launch outdoor marketing per South Carolina Parks Recreation and Tourism grant for the Beard Collection at the Camden Archives and Museum.

The City of Camden has received funding to market the Beard firearms collection at the Camden Archives. These billboards have been designed and will be placed along the interstate corridors throughout South Carolina. This should serve as a pilot project for additional outdoor advertising that would promote other attractions to Camden. Future billboards should follow a simple consistent design and should not be fully funded through the City of Camden but rather through partnerships with key organizations (the Camden Antiques Dealers Association, the Camden Business Alliance, the Chamber of Commerce, Historic Camden, the Fine Arts Center, etc.) In order to set precedent, the impact of the billboards on Archives visitation should be closely monitored to track their effectiveness. All future placements should have similar tracking methods to evaluate their success.

Time frame: Implement Beard Collection billboards within 6 months. Explore additional billboards within 1 year. Key partner: Archives Director, Tourism Director in collaboration with partner organizations.

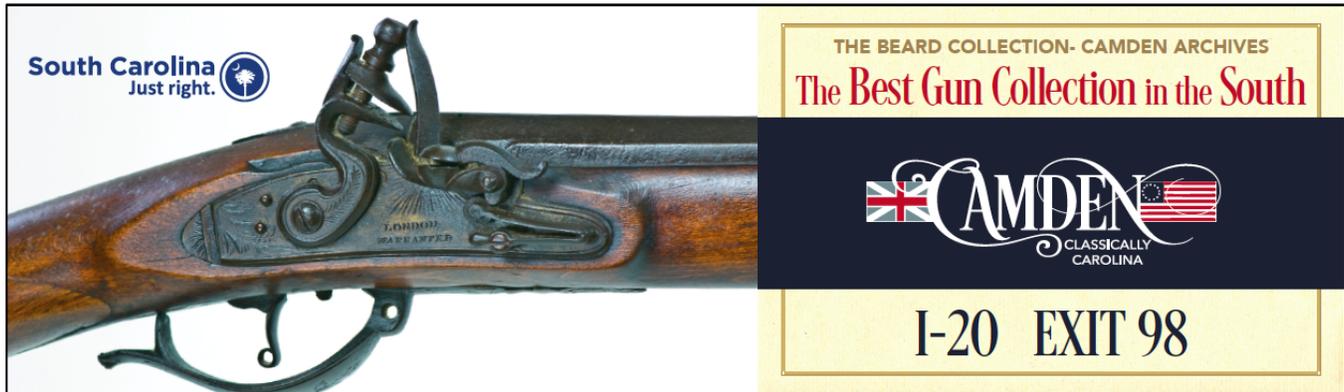


Figure 12: Outdoor Advertising for Beard Collection.

Create a guerilla marketing tactic/campaign for existing visitors to major events and attractions.

An attempt was made to collect zip code data from accommodations and attractions in the area to define Camden-Kershaw’s tourism market. However, the zip code data provided was insufficient and could not be utilized to make valid or reliable recommendations. Even if there had been enough data to do the market analysis, this marketing recommendation would remain the same.

The Camden-Kershaw area has a large base of existing visitors to established tourism products (Steeplechase, SC Equine Park, Carolina Motorsports Park, etc). However, there has not been a concerted and coordinated effort to engage this audience and leverage the opportunities created by these established events and attractions. The Director of Tourism should create a corps of volunteers to engage current visitors.

- Create a “Come back to Camden” campaign that suggests day and overnight experiences built around current products. For example, during the Carolina Cup you should engage visitors to “Come back to Camden” by advertising the packages suggested later in the report.
- Invite and entertain travel writers by providing tickets and familiarization tours surrounding major events. With the equestrian events and industry, Hermitage Farms, historic homes, and antique shopping available, Camden is tailor-made for articles in a publication like Garden and Gun. ***However, we do not recommend purchasing ads in major national publications.***

Time frame: Launch initial guerilla marketing within one year. Establish ambassador program and comprehensive guerilla campaign within two years. Key partner: Tourism Director alongside partner attractions, Chamber of Commerce.

Revisit gateway/corridor improvements with new brand identity.

Although gateway streetscapes and signage have been studied in the past, the time may be right for Camden to explore these issues again. The new community brand identity provides a platform for gateway signage and design cues for corridor improvements. Well-designed gateways can reinforce brand identity, build community pride, and impart a positive impression to visitors. Gateway signage need not be expensive, although monumental gateway signs can certainly require a hefty sum to design and construct. SCDOT’s Transportation Alternatives Program can include streetscape improvements that improve cultural, historic, and environmental aspects of



transportation infrastructure. The City and its partners should explore this and other public and private funding sources to capitalize this project.



Figure 13: Example of Community Wayfinding and Gateway.

Time frame: Prepare wayfinding and gateway plan within one year. Initiate gateway improvements and wayfinding within two years. Key partner: City of Camden Economic Development Director alongside the Tourism Director and Public Works Department.

Consider community wayfinding to link together significant visitor attractions.

Many of the visitor-oriented destinations and attractions in Camden are relatively distant from one another and require some level of directional assistance. A well-designed community wayfinding system would orient visitors and establish clear links between destinations. In general, a wayfinding system should direct motorists to attractions, convert motorists to pedestrians, and orient pedestrians to curate the visitor experience, boost visitation, and facilitate greater spending within the community. A wayfinding system can also reinforce community pride and remind residents of Camden's special and unique places. As some of Camden's key visitor attractions are privately owned and operated, integration of a wayfinding system (which typically prohibits private sector destinations from being included) with SCDOT TODS (Tourism Oriented Directional Signs) and Agritourism program should be explored as well.



Time frame: Prepare wayfinding and gateway plan within one year. Initiate gateway improvements and wayfinding within two years. Key partner: City of Camden Economic Development Director alongside the Tourism Director and Public Works Department.

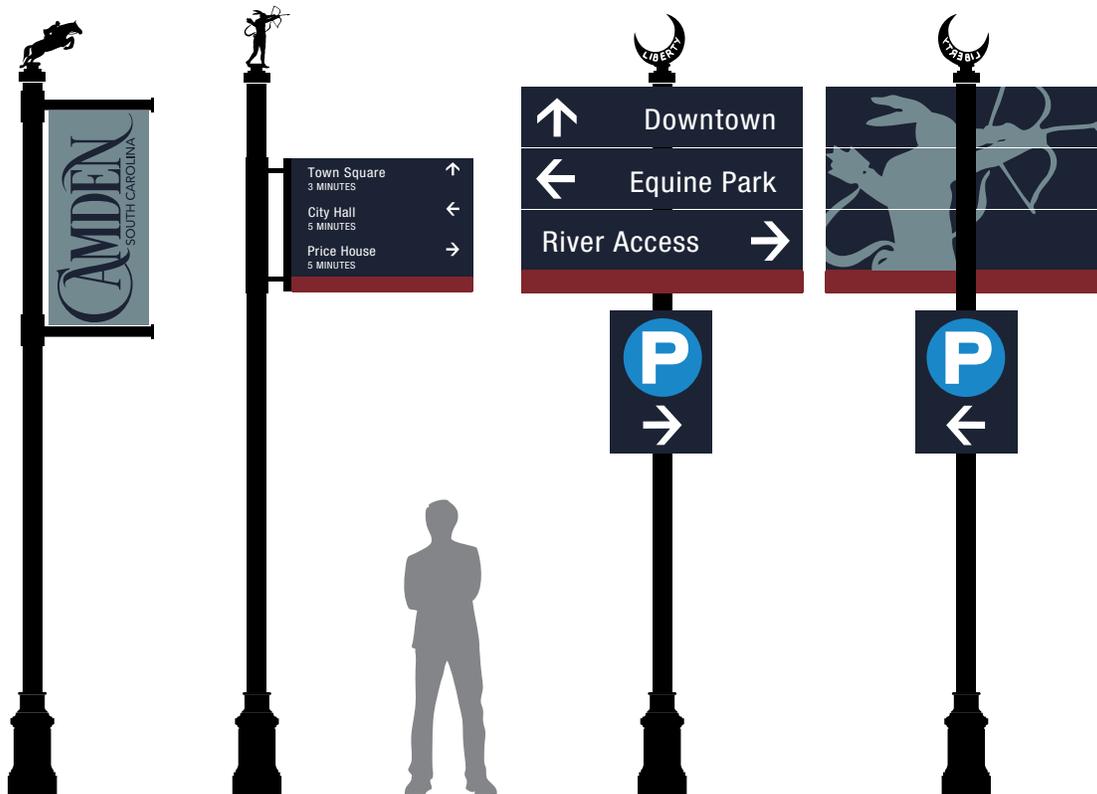


Figure 14: Conceptual Rendering for Community Wayfinding System for Camden.

Launch Marketing in Major Visitor Feeder Markets

As already mentioned, Camden should not be placing ads in national publications geared toward general visitor audiences. A more strategic approach would be to place ads in “feeder markets” that are attracting visitors for similar reasons or are proximate to the community. For example, Columbia, South Carolina has an aggressive visitor-marketing program. Camden should be placing ads in Columbia publications that are likely to reach both the visitor and the regional audience. Charleston should also be a marketing focus for Camden. The Charleston region has a multitude of magazines, visitor’s guides, and promotional pieces that could afford Camden the chance to reach an audience that is already in South Carolina or planning to visit. Placing these ads should be done with care and with an eye toward tracking the impact of each ad placement. A final component of this strategy would be to target *segments* of visitors within these markets as well. The African American Market, Architectural and Historic Tourist, and others all have specific publications and a web presence in these larger markets. Camden should consider strategic partnerships with the Convention and Visitors Bureaus in Charleston and Columbia to help lengthen the visit of visitors to the state.



Time frame: Prepare partnership program within two years. Key partner: City of Camden Tourism Director, the Chamber of Commerce, and special interest groups.

Explore Thematic Visitor Packages.

One of the most effective ways Camden can cultivate its various visitor attractions, foster partnerships among groups, and enhance the visitor experience is to develop thematic packages for visitors to experience. The first package should be an Art, Antiques, and Culture package for day-trippers and overnight visitors. As an example, it might include a performance at the Fine Arts Center, an antiques walk, and an exclusive history luncheon speaker.

Over time additional packages should be developed. The existing brochure profiling African American historic sites should be expanded to include not simply historic sites but current day activities (such as dining at New Horizons), or a custom tour of a Church Sanctuary. A “Guy’s Day Out” package might include a cart race at Carolina Motorsports, a custom tour of the Beard Collection, and shooting at Hermitage Farm.

Time frame: Prepare Art, Antiques, and Culture package within six months. Explore other packages within one year. Key partners: Tourism Director in collaboration with all interested parties to establish packages along with attractions. Ultimately, the packages should “vest” with a key leader like the Chamber of Commerce, which would potentially receive revenue from the sale of packages (thereby incentivizing participation) and help keep each package structured, as the Tourism Director will not be able to manage all packages. Packages should be vested with a group like the Chamber of Commerce, who could potentially derive revenue from the sales of such

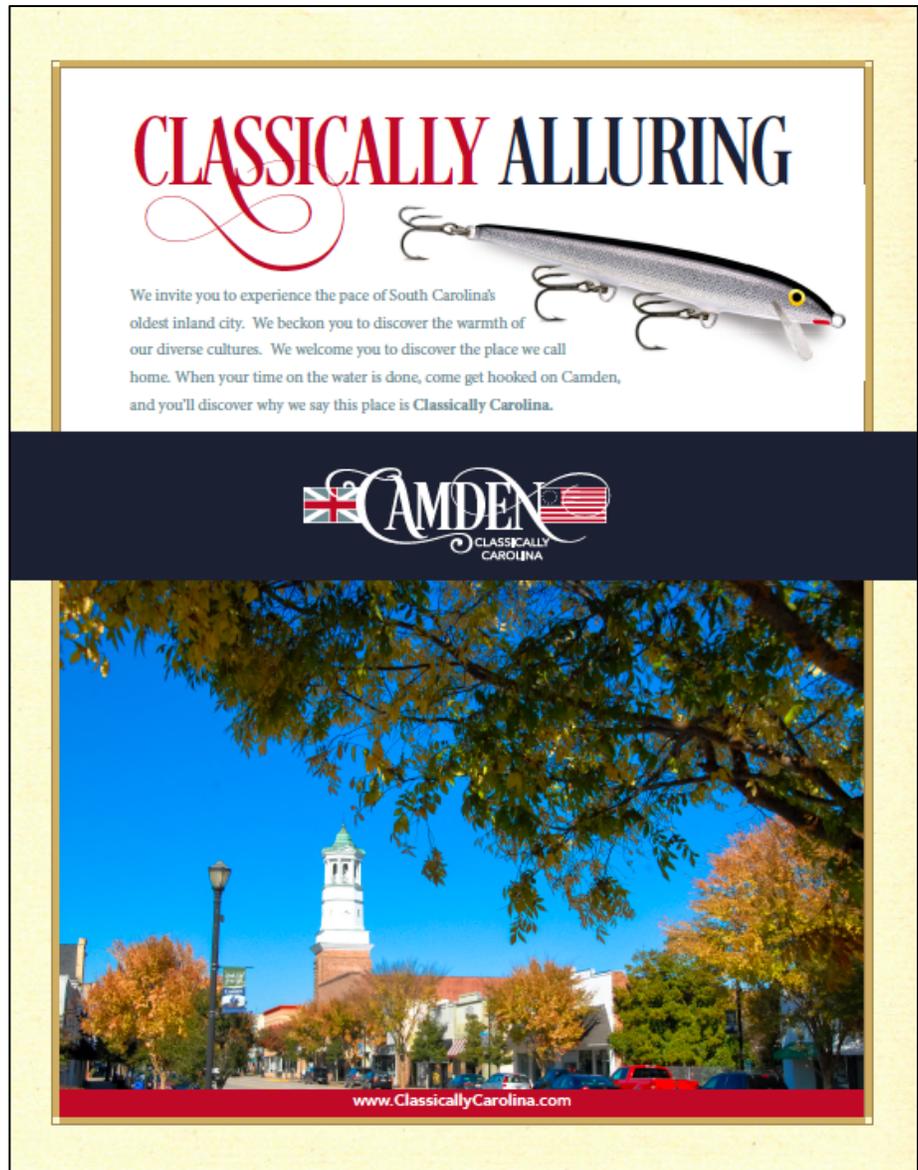


Figure15: Example of Print Advertisement.



packages to tourism. This would incentivize them to participate. Other special interest groups such as African American Churches and Businesses would make ideal partners as well.



3.2 Product Development

3.2.1 Issues and Strategy

The Camden-Kershaw area has an excellent and unique collection of existing tourism product. However, the area needs to build critical mass. For example, while the downtown area has a few solid shopping and dining opportunities, it is not particularly pedestrian friendly and will not hold a visitor's interest for more than a short period of time. In addition, the area is missing an opportunity to position itself as an attractive option for state and regional baseball, softball, and soccer tournaments. Current recreational facilities can and should be upgraded to accommodate these events.

It appears that there has been somewhat of a shotgun approach for new product development. In the future, any new tourism products must reinforce and compliment existing product and be part of the overall strategy.

Even with the interesting and unique existing product mix, the area is not ready for visitors to show up without a specific purpose. Camden must get the basics right first. **Further development of tourism supporting businesses (dining, retail, lodging, etc.) must be completed before the area is mature enough to deploy regional, national, and international marketing campaigns.** Quantifying when the community has reached critical mass is not easy. Some simple benchmarks would be increases in hotel occupancy rates (they have been on decline in Camden), increases in new businesses in downtown, revenue invested in new construction downtown and throughout Camden, and increases in visitation as tracked in recommendations to follow.

The Camden-Kershaw area has a number of high-quality existing tourism products. Obviously, equine opportunities including the SC Equine Park, the Colonial and Carolina Cup races, Hunt Country, and the Tack Room are viable and drive a large number of current visitors. In addition, the Carolina Motorsports Park is a unique facility that hosts many events each year and provides opportunities for people to participate in Kart racing. Hermitage Farms is a world class shooting sports facility providing world-class instruction as well as recreational shooting opportunities. Existing historic and cultural products include the Camden Archives and Museum, Historic Camden, and the Fine Arts Center. The Buckley Institute draws visitors from around the world. Finally, the antique shopping opportunities in Camden are second to none. The strategy for product development for Camden should be:

Camden will focus its product development strategy on connecting and enhancing existing strengths in its equine and historic resources with building critical mass in sports tourism and downtown development to make for a more complete visitor destination.

3.2.2 Sports Tourism Product Development Recommendations

Work with county to increase capacity of SCEP from 30+ to 40+ shows per year

The SC Equine Park indicated that it could host approximately 40 events per year with current staff. The covered arena that is currently under development will help make the facility even more attractive because events will not risk losing as many days to rain. With additional staff, the number of events per year could increase even more. Staff interviewed indicated that it is possible to have two smaller events at the facility at a time. Currently, a number of the 30+ events per year are smaller shows and the facility has hosted multiple groups on a weekend. While it is still important to have open weeks/weekends during the year for maintenance, it is possible to increase



shows and the number of visitors hosted each year by maximizing the facilities capacity. It is also recommended that the roadway, intersection, and entrance be improved.

The SC Equine Park is an essential product to the tourism industry in the Camden-Kershaw area. It is of utmost importance that this facility be kept “sexy” to continue to attract shows, organizers, and participants. ***Do not rest on your laurels when it comes to the SCEP.*** Because equine tourists are such high value visitors to an area, competition to attract events has been increasing. It is extremely important to treat the shows, organizers, and participants like a long-term relationship or marriage.

Time Frame: Additional staffing within 6 months. Continued improvement: ongoing. Key partner: Kershaw County, State of South Carolina, the City of Camden, SC Equine Park and others.

Work with county to improve ball fields and soccer fields

An area with potential that Camden-Kershaw is currently not leveraging to attract events and visitors is sport tourism. Making the necessary improvements for sport tourism is attractive because the improvements will better serve local citizens as well as creating opportunities to increase visitation to the area. While there are some serviceable base level facilities, it appears that most facilities were not completed. For example, some lack lighting, others lack restrooms, and some lack parking. **By completing field improvements and adding restrooms, parking, and lights the Camden-Kershaw area can position itself as a low-cost alternative for regional and state level baseball, softball, and soccer tournaments.**

Within five years, Camden should be prepared to replace the Rhame Arena and build a new facility to serve both the administrative needs and sporting facility needs that will be needed to support tourism and local activities. A concept for this facility is presented in greater detail in recommendations below for downtown.

Time Frame: One year to assess needs and work on a partnership with Kershaw County. Key Partner: Kershaw County should take the lead on this initiative in partnership with the City of Camden. The county recently hired a recreation director with the experience to maximize this market and who is very well respected in his field.

Other Recreational Opportunities

In addition to equine and traditional sport tourism development, attracting fishing tournaments, expanding cross country meets, developing canoeing and river access as a stand alone product, and exploring the possibility of partnering with the state park service to expand trail riding opportunities at Goodale State Park are all viable areas to explore and develop. Some of these efforts may require capital expense such as establishing a canoe launch and river access development for the Wateree. The City of Camden is currently investigating the development of an environmental learning campus with canoe launch at its new wastewater treatment facility.

3.2.3 Historic and Cultural Tourism Product Development Recommendations

Develop a Strategic Plan for Historic Camden

Historic Camden is an important cultural amenity for the community. For nearly forty years, Historic Camden Foundation has supported a unique attraction that combines historic structures with accurate reproductions of important structures that were in place during the Revolutionary War era.

The Historic Camden Foundation is awaiting a decision on an application before the National Park Service to designate the site as a unit in the National Park Service. While a decision on this application could come as soon



as 2014, actual designation is dependent upon Congressional approval and funding. If approved, Historic Camden will be placed on the bottom of a growing list of recommended new units within the Park Service.

Unfortunately, the National Park Service has been on a continual course of budget constraints unlikely to be resolved for the foreseeable future. Furthermore, Congressional interest in designating new units within an already strained National Park System is lacking. The prospect of designation and funding mean that a realistic path forward at the national level will not be clear for years to come.

The board of the Historic Camden Foundation recognizes that the facility must not stagnate awaiting federal decision-making. As a result the Foundation is working to create a regularly opened working tavern on the site so visitors might experience an authentic evening in a functioning facility. In an era where the visitor and local are looking for authentic experiences, such a move can make Historic Camden even more relevant to local and regional customers.

This is a step forward for Historic Camden. **A more important step and one that should be implemented with the support of the City of Camden is to conduct an update to the original master plan for the site (created in the early 1970's) along with an accompanying strategic plan and fiscal strategy designed to have the Historic Camden Foundation work towards being self-sustaining through a clear five year business plan.** Whether or not National Park designation occurs, such a plan is essential to ensure Historic Camden remain viable in a national climate where historic sites, house museums, and collections are facing increasing fiscal challenges.

Time Frame: One year to fund and to complete plan update and strategic plan. Two years to become self-sufficient based on the plan. Lead Partner: Historic Camden Foundation with the financial support of the City of Camden to fund a portion of the plan update.

Expand Tour of Homes Festival

Currently the Camden Junior Welfare League conducts a Candlelight Tour of Homes during the holiday season. This event should expand to include more partners, extend its timeframe (and perhaps contemplate another time of year), and take cues from successful home tours in communities like Columbus and Vicksburg, Mississippi. One consideration would be to expand the tour to have “tiered” levels of tours where select homes are open on a very limited basis for a higher cost. There are several landmark homes in the Camden area that are national treasures rarely if ever open to the public. The Camden Tourism Board should work in conjunction with an event committee. The Committee Chair or Board Chair would serve as the lead for this event. Non-profit organizations who can benefit from the event would serve as partners. The Tourism Director should serve a minimal advisory role, as organization of and execution of the event will be the responsibility of the Board and/or Event Committee and its partner organizations.

Time Frame: Within two years. Lead Partner: Camden Tourism Board in conjunction with non-profit partners.

Continue support of Archives and Museum

The Camden Archives and History Museum is one of the single most unique amenities within the community. Its foundation support coupled with it being a department within the City of Camden is indicative of the values of the community and the critical role this facility plays in sharing the history of the region. The Archives should continue to be a department of the City of Camden and ongoing relationships with partners such as Ross E. Beard, Jr. should continue to be cultivated, rotating exhibits should be explored (as the museum has a vast collection not



currently on display), and the Archives role as the “clearinghouse” for understanding family and land history of South Carolina’s inland should be promoted. The Camden Archives is a “national caliber” treasure for the community.

Time Frame: Ongoing. Lead Partner: Camden Archives and Museum, Archives & Museum Commission, Friends of the Archives.

3.2.4 *Downtown Development Recommendations*

Pursue Aggressive Downtown Development

Downtown Camden is the specialty retail and dining center of Kershaw County. It is richly historic and has the potential to evolve into an even more dynamic district. However, downtown has been through several planning initiatives dating back to the 1970’s and is currently in dire need of public and private sector investment. Although its validity is still debated in the community, the recently implemented Town Green project succeeds as a public gathering space in Camden and should not be removed any time in the near future but rather should be programmed in partnership with other organizations for additional regularly scheduled events.

Events are critical to the success of downtown Camden. **The city should play a supporting role in event production and activity with the lead role held by partner organizations.** Events should be either revenue neutral or generate revenue for partner organizations. If the event loses money, it should be seriously considered for significant changes or be eliminated altogether.

While there is a reasonable mix of dining and shopping options, the downtown is not particularly pedestrian friendly, lacks critical mass, and the important 100% corner of Broad and Rutledge home of Camden’s iconic clock tower is sadly occupied by a thrift store. For a community that prides itself on its rich history, the latter situation is indefensible particularly when other downtowns across South Carolina (many with far fewer resources) are making significant investments in their downtown.

Camden should continue its aggressive role in recruiting businesses identified in this plan as appropriate for downtown. This role should rest with the City of Camden’s Economic Development office.

Physical improvements for pedestrian environment downtown are essential. Currently downtown Camden is oriented for the quick movement of automobiles through the heart of the district. Downtowns that are geared toward the walking public are time-tested as places that people want to be and countless examples exist across the state and nation of downtowns that accommodate the pedestrian without eliminating car traffic. The proposed three-lane configuration for downtown Camden (called a road diet locally) should be implemented. The success of these projects far outweighs the very few poorly implemented projects and this is essential to the ongoing vibrancy to downtown. Concurrently, Camden needs a detailed parking study that clearly quantifies if there is a need for more parking, where it should be placed, best practices for managing parking, and long term goals to adapt as downtown continues to thrive.

Finally, the City of Camden should pursue South Carolina Main Street membership as a way to be a part of a state and national organization with over thirty years’ experience combined with a comprehensive approach to the success of downtowns. The South Carolina Main Street Program run through the South Carolina Municipal Association is a key ally in this effort.



Time frame: Join South Carolina Main Street within a year. Evaluate all events within a year. Complete streetscape improvements within five years. Key Partner: City Council will be the lead partner in advocating for Main Street Program and participation by stakeholders, the City of Camden Economic Development Office will administer Main Street Program.

Pursue Downtown Hotel.

A recently completed feasibility study indicates that while demand for traditional chain hotels in Camden is tepid, a unique hotel in downtown could be successful if it uses creative partnerships for implementation. Some examples may include a privately developed hotel with local investors owning rooms in the hotel and placing them in a rental pool (basically a condo-hotel concept) or a partnership with the Springdale Hall Club to have a downtown “companion” to its cottages. **Creative financing will be essential to the success of this project.**

Time frame: Within five years. Key Partner: Private Sector Investors, City of Camden.

Pursue Downtown Meeting/Activity Space

Part and parcel to developing a downtown hotel is the development of complementary meeting and activity space in downtown Camden. This space could be extremely creative and flexible to allow for both recreational and meeting space to occur in the same facility. The Dillon Wellness Center http://www.cityofdillonsc.us/residents/wellness_center.php is a facility worth studying for its flexibility in providing both meeting and recreation space in a cost-efficient facility.

Partner: City Council/County Council; City & County Economic Development; Committee of 100



3.3 Organization and Funding

3.3.1 Issues and Strategy

Issues

Although many of Camden's organizations are to be commended for their work, there is not a coherent strategy to show how their efforts can collectively work to improve the visitor experience for the community. **Currently, tourism roles and responsibilities in Camden are fragmented and disorganized.** Not only does this impair the ability of Camden to remain "top of game" in an increasingly competitive tourism market, it creates internal friction and competition for limited resources. **Organizational funding decisions in Camden have been based on tradition and political clout rather than the merit and impact of the proposed project or activity. As a result, the correlation between the level of public funding and its return on investment is lost.**

In Camden, there is a critical need to understand the return on investment of publically funded organizations and events. As public monies are limited the City must use them wisely to generate additional revenue. As a result, the strategy for organization and funding in Camden should be:

"Camden will streamline its organizational approach to tourism development and utilize relevant data to steer funding decisions."

3.3.2 Organization and Funding Recommendations

Hire tourism director

The tourism director will report to and operate in cooperation with the City of Camden's Economic Development Director in the short term. The tourism board (described in the next recommendation) will guide and assist with the work of the tourism director in organizing and enhancing the tourism industry in Kershaw County. A position description and recommended salary range has already been provided to the City of Camden to be used in the hiring of the director.

Time frame: Within six months. Key Partner: City of Camden.

Create tourism cooperative with county and work with County to collect H-tax

The tourism industry in the Camden-Kershaw area will not reach its full potential unless it is a true partnership between the City of Camden and Kershaw County. Kershaw County is leaving a significant revenue source on the table by not collecting hospitality tax. The 2-percent hospitality tax is an insignificant tax that has an almost imperceptible impact on local residents and visitors. For example, an individual who spends \$100 a month on dining out at restaurants would only pay an additional \$2 in H-tax. Therefore, we strongly encourage the City of Camden to aggressively lobby the county to implement the H-tax and provide funding for current tourism initiatives and funding for the future non-profit Tourism Bureau.

Time frame: Within two years. Key Partners: City of Camden and Kershaw County



Create board to guide and assist with the work of the tourism director and work towards semi-autonomous, non-profit Tourism Bureau

While the tourism director will initially be an employee of the City of Camden, a tourism board should be created immediately to guide and assist with the work of the director. As the tourism industry grows and matures and when and if the county buys in by collecting H-tax, tourism should be transitioned out of city government and become a semi-autonomous, non-profit Tourism Bureau. Board appointments can be adjusted as deemed appropriate.

The board should be comprised of 5-people with 3 appointments by City Council, 1 appointment by County Council, and 1 appointment by the Chamber of Commerce.

Guidelines for appointments:

- 1) At least one person representing the lodging industry.
- 2) At least one person representing the hospitality industry.
- 3) At least one person representing tourist related retail business.
- 4) At least one person representing major attractions.

Time frame: Within six months. Key Partner: City of Camden, Chamber of Commerce, Kershaw County

Mandated collaboration and strategic plan to receive funding

In order to receive H- or A-tax funding for events or projects, preference will be given to organizations that create partnerships. For example, if the Fine Arts Center partners with the Chamber of Commerce to create a new event or enhance an existing event, they would receive funding over an organization attempting to create an event on their own.

Each applying agency should not only have collaborative practices in place, it must also demonstrate that it has a strategic plan in place to sustain and enhance itself and the event being funded. **The application for funding from either A or H Tax should be amended to include the following as key criteria for funding:**

- What is your data collection strategy? Explain how are you going to use the survey to evaluate the success of the event.
- If this is NOT a new event, provide a three-year profit and loss statement for the event.
- Describe how this event furthers the goals of the 2014 Camden Strategic Tourism plan
- Under the attendance figure question, what methodology did you use to determine attendance?
- List the private sponsors for the event, other sources of revenue and amounts.
- Describe the partnerships involved in producing this event.
- Not all events are designed to be self-sustaining, however all events should strive to be efficient in their use of public funds, please describe the methods you have a plan in place for this to become more self-sustaining, include the sources of funds would you use if grant moneys are not available.

Time frame: Within six months. Key Partner: City of Camden.

Maintain and fund visitor's center at the Chamber of Commerce

Due to its location, historic significance, quality of the facility, and the close relationship that tourism should have with the Chamber of Commerce, the visitor's center should be maintained at Mills Courthouse. **Continue funding the visitor's center to include evening and weekend hours to best serve visitors.**



Key Partner: City of Camden, Chamber of Commerce

Create a hospitality training program geared towards frontline employees

Work with local high school programs to develop training geared toward hospitality and other frontline employees (waiters/waitresses, convenience store attendants, hotel front desk staff, etc.) Program could be online. Implement “Top 5 Camden” marketing piece that can be handed to visitors and placed at attractions, hotels, restaurants, service stations, etc. Should include QR code and link to tourism website. The major goal of this recommendation is that visitors are being provided with accurate and consistent information.

Timeframe: Within one year. Partner; Chamber of Commerce, Kershaw County School District, Central Carolina Technical College



3.4 Data Collection and Analysis

USTA’s Travel Economic Indicator Model is made available by SC Department of Parks, Recreation, and Tourism management. This top-down model (state and federal level data extrapolated out to county level) is useful for tracking growth and comparing the Camden-Kershaw tourism economy to other counties in the state.

The baseline economic model provided in this report is a bottom-up model that provides another method to track growth or decline in the Camden-Kershaw tourism economy. The main advantage to this model is that it begins with data collected (accommodations tax collections) in Kershaw County and builds the model from the ground up.

	Camden	Aiken	Newberry
Enter FY Accommodations Tax Revenue:	\$124,351.42	\$643,203.94	\$106,539.37

<i>Direct Spending</i>			
Lodging	\$6,217,571.00	\$32,160,197.00	\$5,326,968.50
Transportation	\$9,587,843.13	\$35,917,229.36	\$5,949,277.90
Dining	\$8,309,464.05	\$42,980,450.20	\$7,119,219.58
Retail	\$2,672,974.45	\$13,825,879.08	\$2,290,098.61
Ent & Rec	\$2,266,217.47	\$11,721,940.96	\$1,941,605.34
Total	\$29,054,070.09	\$150,281,294.39	\$24,892,376.17

<i>Economic Impacts</i>			
Total Demand	\$26,148,663.08	\$135,253,164.95	\$22,403,138.55
Jobs	698	3609	598
Net Local Govt Rev	\$1,778,919.00	\$9,201,404.47	\$1,524,107.32
Net State Govt Rev	\$5,753,641.43	\$29,760,535.40	\$4,929,492.02
Total Impact/Output	\$32,162,855.59	\$166,361,392.89	\$27,555,860.42

A separate spreadsheet will be provided that can be utilized for year-to-year tracking of growth or decline.

- Total Demand – direct expenditures by visitors to the Camden-Kershaw area
- Jobs – jobs supported by the economic activity attributable to visitors to the Camden-Kershaw area
- Net local government revenues – net revenue accumulated by local government entities in Kershaw county as a result of visitor expenditures
- Net state government revenues – net revenue accumulated by SC state government



entities as a result of visitor expenditures in Kershaw County

- Total Impact/Output – total effect of visitor expenditures and spend through effects in
- Kershaw County including direct (total demand), indirect (spending by businesses), and induced (spending by employees) effects

This data should be reported to Council on a quarterly basis though the data will not become meaningful until year over year data is reported. The goal of this strategy is to: “Use data as a way to inform the efficient and effective use of tourism funding.”

Standardized electronic guestbook at all attractions to include zip code, purpose of trip, number of days staying in Camden area, accommodations, estimate of spending by category (lodging, dining, retail, transportation, entertainment, miscellaneous)

Invest in iPads to be placed at major attractions (Carolina Motorsports Park, SC Equine Park, antique shops, Camden Archives, etc.) that will act as a guestbook and collect basic data from visitors. Use data to refine and continue to build tourism impact analysis. Sample guestbook survey has been developed in iSurvey and access will be provided.

Expanded visitor surveys at CMP, SCEP, Springdale races, other events drawing majority of visitors from outside Kershaw County

Use electronic guestbook survey to collect spending and other data from visitors to all major events and events that receive funding from H- and A-tax sources. These surveys can and should be expanded to include additional questions that are unique to each event. Guestbook survey has been developed in iSurvey and access will be provided. Survey can be expanded to include additional questions for each event. The goal of this data collection is to make the connection between the data being collected and grant funded groups being able to report that data on grant and funding applications in the future. Return on investment will be a key feature of future funding from both Hospitality and Accommodations Tax revenues.



3.5 Conclusion

The attached “Strategy Board” summarizes all of the projects and recommendations included in this plan. The board is a working document for benchmarking and ongoing evaluation of the implementation process. The strategy board summarizes all of the recommendations of the plan into one sheet of paper.

The projects are divided into three time frames. The first series of projects are demonstration projects that should begin in the coming six months. The second set of recommendations is labeled “next steps” and should be completed within a one-year time frame. Some of these are more advanced projects while others are continuations of projects that began during the demonstration period. The next step projects should be completed within the first year of the plan. The final series of projects are long-term or plan completion projects that may be from one to five years to complete.

The strategy board and its recommendations represent a “living document.” As time goes by and implementation proceeds, some priorities will shift while other ones will arise. The implementation strategy board should be evaluated periodically, no less than annually. This evaluation process will allow for finished tasks to be indicated on the board, for responsibilities to be shifted between parties, and for time frames to be adjusted for individual projects.

Each of the plan strategies and visions are outlined in the strategy board. It is important to remember the ultimate planning, development, and marketing strategies that each project supports. Of course, each of these strategies is linked with one another, but failure to achieve any one goal does not negate the ability to achieve others.

Camden is at a crossroads of its development as a tourism destination. For centuries a destination for visitors, Camden must work together as a community to remain relevant in an increasingly competitive market. The community is rich in resources, beauty, and opportunity and will certainly seize the opportunities ahead.



Strategy Board: Camden Tourism, Market Study, and Branding Plan

Strategy	First Six Months	Within One Year	Two Years and Beyond	Goal
Branding and Marketing	<ul style="list-style-type: none"> Launch brand identity for Camden. Distribute brand identity to key partners. Foster partnerships to ensure brand integrity. Launch and redirect to "classicallycamden.com" Implement outdoor advertising for Brand Collection. Prepare art, antique, and culture package. 	<ul style="list-style-type: none"> Establish independent site for "classicallycamden.com" Ensure mobile presence for web site. Revise Publication Pieces Coordinate visitor and local guides. Create downtown publication piece. Expand billboard presence. Launch guerrilla marketing campaign. Prepare wayfinding plan. Expand visitor packages. 	<ul style="list-style-type: none"> Implement wayfinding plan. Implement additional gateway signs. Continue guerrilla marketing campaign. Launch marketing in feeder markets. 	<p>Camden will leverage its assets, both internal and external, public and private, to promote the community as a destination.</p>
Product Development	<ul style="list-style-type: none"> Provide additional staffing for SC Equine Park City and County partner to improve parks. Continue support of Archives. 	<ul style="list-style-type: none"> Continue improvement to SCEP. Expand product to other recreational opportunities. Fund strategic plan for Historic Camden Foundation. Join SC Main Street. Evaluate all events for return on investment. Explore downtown meeting/activity space. 	<ul style="list-style-type: none"> Continue improvement to SCEP. Continue to improve product development for recreation. City verifies Historic Camden is self-sufficient and following strategic plan. Expand Tour of Homes festival. Complete street improvements (road diet) Pursue downtown hotel. Implement downtown meeting/activity space. 	<p>Camden will focus its product development strategy on connecting and enhancing existing strengths in its equine and historic resources with building critical mass in sports tourism and downtown development to make for a more complete visitor destination.</p>
Organization and Funding	<ul style="list-style-type: none"> Hire tourism director. Create board for tourism guidance. Mandate collaboration and strategic plan to receive H and A tax funding. Maintain and fund visitors center at Chamber of Commerce. 	<ul style="list-style-type: none"> Staff visitors center. Create hospitality training program. Check on return on investment of tourism related funding. 	<ul style="list-style-type: none"> Create tourism cooperative with County – leading to independent group. Modify policies as tourism cooperative becomes more independent to ensure ongoing accountability and return on investment for funding. 	<p>Camden will streamline its organizational approach to tourism development and utilize relevant data to steer funding decisions.</p>
Data Collection and Analysis	<ul style="list-style-type: none"> Use baseline data created by model to understand tourism economy in Camden. 	<ul style="list-style-type: none"> Implement trial of electronic guestbooks at key attractions and events. Expand visitor surveys at key attractions and events. 	<ul style="list-style-type: none"> Expand guestbooks and surveys to all events and attractions, standardize results. 	<p>Camden will use data as a way to inform the efficient and effective use of tourism funding.</p>

● City of Camden (Economic Development primary)
 ● City of Camden (Tourism Director)
 ● Main Street Camden
 ● Chamber of Commerce
 ● Kershaw County
 ● Non-Profit Partners