



The inaugural Cultural Heritage Tourism Exchange brought together more than 100 practitioners and experts from around the country on Tuesday, May 3, 2011 in Washington, DC. The stakeholders represented 22 states including six state tourism office representatives, 10 city offices or convention and visitor bureaus, six national heritage areas, three museums, two scenic byways, two cultural attractions, two humanities organizations, two arts organizations, and one Preserve America community. Partners in Tourism's 29 federal agencies and national organizations provided a dynamic counterpart to the delegates, which together created a timely exchange of expertise, ideas and instructive information.

Supported by the Office of Travel & Tourism Industries (OTTI) and conceived and implemented by Hargrove International, Inc., the Exchange was held at the U.S. Department of Commerce. Recognizing the need for a national conversation about the issues and opportunities for advancing cultural heritage tourism in America, the organizers and host "Partners in Tourism" facilitated a series of conversations to address these topics and to identify ways to enhance the U.S. brand as a travel destination for international visitors.

An online survey conducted prior to the Exchange and completed by 240 stakeholders identified the following issues to address:

1. Funding
2. Justify the Value of/Making the Case for the Importance of CHT
3. Lack of research/hard data
4. Marketing
5. Lack of staff

The Cultural Heritage Tourism Exchange – Overview

The morning sessions offered delegates a chance to learn more about the programs and activities of federal and national agencies, the Travel and Tourism Advisory Board, the Corporation for Travel Promotion and the Congressional Travel and Tourism Caucus. In addition, in response to requests from the field, state cultural heritage tourism coordinators met to discuss current programs, future needs and potential partnerships.

Following a networking lunch and performance by Rick Franklin, a Piedmont Blues musician, the delegates participated in facilitated conversations focusing on research, product development and marketing. The day concluded with a general session to share highlights from the facilitated conversations and a challenge to frame next steps, with each delegate asked to pledge their personal commitment to move the agenda forward. The information in

this report provides a synopsis of the conversations and an outline of the proposed strategies to advance cultural heritage tourism in the United States.

Special thanks to the team of facilitators who contributed their time and expertise to direct the information flow and keep conversations moving: Linda Harper, Executive Director of Cultural Tourism DC, facilitated the federal agencies and product development sessions; Berkeley Young, President of Young Strategies, facilitated the national organizations and marketing sessions; Amy Webb, Heritage Tourism Director for the National Trust for Historic Preservation, facilitated the State Coordinator meeting; Ron Erdmann, Deputy Director of OTTI, and Randy Cohen, Vice President of Americans for the Arts, co-facilitated the research sessions. Students from the George Washington University's Masters in Tourism Administration program helped record the conversations.

Morning Exchange:

Federal Agencies, National Organizations, State Coordinators, and Special Entities

Two breakout sessions allowed delegates the opportunity to meet with and learn about specific groups engaged in or affecting the potential growth of cultural heritage tourism.

Federal Agencies:

The discussions included an overview of federal programs that contribute to the advancement of cultural heritage tourism in the United States. Highlights of the updates include:

- National Register of Historic Places (NTHP) and their "online travel itineraries" which link listings along particular themes or in destinations, and serve as a partnership/promotional tool, especially for international visitors.
- National Oceanic and Atmospheric Administration (NOAA) as the "underwater" link to trails and resources; it also develops and manages visitor centers. This agency is seeking additional ways to increase partnerships with destinations and organizations.
- National Endowment for the Arts (NEA) is seeking applications under its Challenge America: Fast-Track Grants deadline of May 26, 2011, for cultural heritage tourism marketing projects. The NEA's Our Town category may also support major projects with tourism implications. In addition, most states have state folklorists who can assist communities in identifying traditional artists.
- Appalachian Regional Commission supports economic development projects throughout its service area. A partnership with the NEA supports cultural heritage tourism planning and development.
- The Advisory Council on Historic Preservation (ACHP) recognizes that the 800+ "Preserve America" communities represent a substantial network to engage, include in partnerships and programs. Cultural and historic resources are considered economic assets, drivers.
- National Heritage Areas, as part of the National Park Service, include many rural areas. These areas partner, but branding the collection is a challenge as individual heritage areas are at different stages/levels of development, readiness and marketing.
- The National Trails System of the National Park Service is an under-utilized and under-promoted resource, as is the Rivers, Trails and Conservation Assistance that provides technical assistance to communities throughout the country (communities that do not have a NPS unit).

- Federal Highway Administration (FHA) and the National Scenic Byways Program often provide a bridge to state tourism offices, and help link natural as well as cultural and heritage assets together. Cultural events can link and serve as a patchwork for land use management.
- The U.S. Forest Service (USFS) and the Department of Agriculture have several programs that focus on sustainable tourism, in which cultural heritage is included.
- National Endowment for the Humanities (NEH) works closely with State Humanities Councils to offer preservation assistance grants as a beginning point for collaboration and education.
- America's Great Outdoors (AGO), a new initiative for 2012 coordinated by the Department of the Interior, offers ideas for projects and stakeholders to link with natural resources. It is a great way to connect nature-based activities to First Lady Michelle Obama's "Let's Move" campaign. If arts and heritage are included in this effort, more integrated nature-culture-heritage experiences can be developed promoted, and offered.

Involvement of federal agencies is seen as validation of importance; "locals listen" if a federal agency has funded or designated a program/initiative. A consistent thread weaving through the two sessions focused on the need for more federal/state/local (public/private) partnerships that can be measured to demonstrate the impact of cultural heritage tourism. Funding is currently at risk for many programs.

Concerns were voiced about how the segment is perceived as a "niche" and perhaps not as valued as other types of economic development or tourism. Discussion also focused on the need to recognize the fragility of resources, the desire for authentic stories, the need for greater communication among constituents and stakeholders, the use of technology, and the need for consistent definition: "natural" should include cultural landscapes; cultural assets, and experiences as part of "recreation." Tribal members expressed a need to include cultural values into programs focusing predominately on natural resources. Sustainable sensitivity is important to the big picture, long-term.

National Organizations:

The morning sessions identified key topics for discussion before launching into an overview of cultural heritage tourism programs and initiatives offered by national non-governmental organizations.

- Tribal representation at the national level is unfocused with a number of groups carrying the cultural heritage tourism portfolio, including the Tribal Historic Preservation Officers and the Bureau of Indian Affairs, which are members of Partners in Tourism and the American Indian Alaska Native Tourism Association (AIANTA). Each state has tribal members and/or nations. It is important to approach individual tribes and seek their opinions, rather than telling them a role to play.
- With funding from NEA, the National Trust for Historic Preservation (NTHP) Heritage Tourism Program created a new "Survival Guide" with 11 tips for grassroots marketing. The Heritage Tourism program also manages, on behalf of Partners in Tourism, the website – www.culturalheritagetourism.org – and produces the quarterly newsletter for industry stakeholders to share best practices, news and other relevant

data. Entities are encouraged to contribute information for these resources and to connect more practitioners to the site so it is used more universally.

- The National Trust's Main Street program has done an excellent job of demonstrating the economic impact of commercial revitalization and building a strong community of advocates.
- The Cultural & Heritage Tourism Alliance – www.chtalliance.com – serves as a channel for communication in the field.

Key topics of interest included fostering partnerships, enhancing coordination and cooperation among stakeholders, increasing funding, and demonstrating relevance for and respect of cultural heritage assets. A list of big ideas and specific recommendations generated during these sessions is included in a separate report entitled "Next Steps."

State Cultural Heritage Tourism Coordinators:

After the delegation shared updates on their respective programs and current situations (staffing, budget, priorities), the group agreed that cultural heritage tourism is the convening table (commonality to bring them together.) The delegates discussed how to bundle cultural heritage tourism to market the sense of place and all of its ingredients, bridging niches to promote the larger story with limited resources. The delegation also recognized the need for a strategy to sustain successful programs, to identify and share information that "gets communities talking" and working together around a common purpose.

Of particular note was the discussion on using more modern marketing approaches, recognizing that how people travel affects both product development and marketing strategies. Consistency of experiences and products, especially along trails, was also identified as an opportunity and a challenge.

Special Sessions (TTAB, CTP, Tourism Caucus)

Board members of the Travel and Tourism Advisory Board (TTAB) and the Corporation for Travel Promotion (CTP) offered a unique perspective into the current policies and proposed programs for these entities. Discussions also focused on membership of these entities, as well as access and participation.

As part of the Exchange's focus on reaching key decision makers, congressional staff members James Feldman, from the office of Senator Mark Begich (D-AK), and Tom Tucker, from U.S. Representative Sam Farr (D-CA)'s office, were asked to present their views on the Congressional Travel & Tourism Caucus and its role. In a conversation with Helen Marano, Director of the U.S. Department of Commerce's Office of Travel & Tourism Industries, staff members outlined several strategies for elevating cultural heritage tourism as a vital economic sector with the Caucus. Tucker and Feldman compared the Caucus to a megaphone, which can amplify information that can be delivered in the following ways:

- Remind members of the economic benefits of CHT and leverage your local contacts to deliver that message.
- Organize visits in while the member is in the state or district by bundling state tourism and local business leaders.
- Invite the member to events.

In response to questions from the audience, the staff members were asked about working with other caucuses such as the Arts Caucus, which has been an effective forum for members to discuss and advance cultural policy. Although aware of the Arts Caucus, the staff members had not collaborated with them on issues, but expressed interest in future collaborations with both the Arts and Historic Preservation Caucuses.

The staff members in turn asked the delegates to assist them in expanding the membership of the Tourism Caucus by encouraging their elected officials to join. Currently, there are only 50 members of the Travel & Tourism Caucus; last year, there were more than double that number. The session closed with this advice: be flexible; be prepared and knowledgeable about your issue; keep your information/messages concise; and be persistent.

Afternoon Exchange:

Research, Product Development, and Marketing

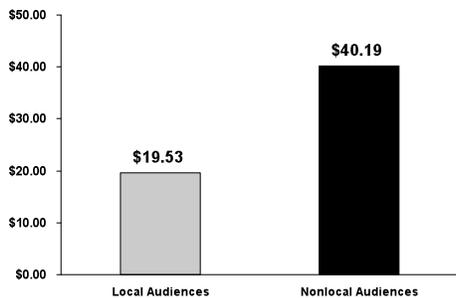
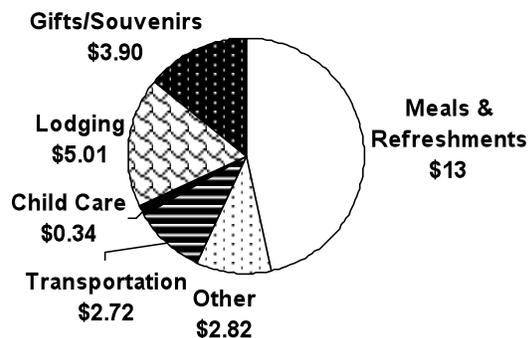
Originally, two discussion groups – product development and marketing – were scheduled to stimulate conversation about the unique issues/needs for cultural heritage tourism in the United States. The online survey responses overwhelmingly identified the need for more/better research, and as a result, a third topical session was added in the afternoon.

Research

An initial review of existing research led delegates to discuss other needs for documenting, analyzing and validating cultural heritage tourism in the United States.

Nonprofit Arts Attendees Spend an Average of \$27.79 Per Person

Facilitator Randy Cohen, Americans for the Arts, shared two significant findings from their research: the economic impact on the community from individuals engaging in arts events, and how the non-local arts participant spends twice as much as the resident participant.



Non-Local Arts Audiences Spend Twice as Much as Local Audiences

These findings helped frame the afternoon conversations about collaborations and relationships, the multi-level/pluralistic approach to research and how to study/quantify the impact of cultural heritage tourism.

Americans for the Arts plans to update its guidelines and research in 2012.

A CREDIBLE STUDY

Defining what we really need to know, the message and delivery system are important steps to address prior to initiating the next study. The discussion groups outlined some preliminary instructions:

- Present multiple perspectives, voices, and interpretations
- Select and analyze evidence; consistent data
- Deal with different contradictory evidence
- Find different methodologies or models for interpreting evidence
- Identify connections among processes and trending research

Several issues/challenges were identified with current research and segment needs:

- Ask the right questions. One of the problems with branding and data collection is that questions are often too broad. As a market niche, cultural heritage tourism has to be defined consistently so that information can be compared nationally as well as at the state and local level. Cultural heritage is also not necessarily or uniformly defined by the customer, but rather defined by the activities engaged in during a visit or experience. Paralleling international/global research is important for understanding cultural differences in market profiles.
- Lack of specificity in current research hinders the ability to demonstrate the specific impact of cultural heritage tourism on destinations. The greatest challenge is to find funding to conduct timely research with consistent benchmarks, methodology and analysis. Mandala Research described their approach to benchmark community sentiment and described their current 160 cities survey, with the scope and drift of study planned for every five years.
- Quantifying impacts such as enhanced civic/community pride, beautification, conservation and preservation, mythbusting, and quality are important but difficult. The group asked how to consistently demonstrate value and important benefits when impact is generated over time or because of several factors. Some projects require substantial investment of time and resources. For example, the Underground Railroad is an important development/interpretive project. How is a return on investment measured? What about performance measurement of resource management and stewardship?
- Mission vs. Market. Many non-profit organizations that manage cultural and historic sites/attractions/activities measure success based on mission rather than marketing or tourism benchmarks. Systematizing data collection, and educating individual/state cultural heritage agencies/institutions/managers on the value of this market and economic impact research needs to be a priority. Delegates discussed research as part of a broader context for helping define development and marketing strategies. Information on visitor behavior and lifestyle analysis is important to target activities and funding. There is a need, especially with elected officials, to tie performance to jobs and the economy. Several agencies including Institute of Museum and Library Services (IMLS) and ARC require a monetary value analysis of program outcomes.

- Tracking mega-events. National events and commemorations provide a platform for states, destinations, and sites to organize around. How are these programs individually and collectively measured, aggregated to demonstrate impact? Can a ripple affect be determined and measured? For instance, several special activities are commemorating the 150th Anniversary of the Civil War. How can the overall program be evaluated, and then compared to/measured with individual activities?
- Use of technology. What are the best ways to obtain information in the 21st century? Do certain audiences prefer certain tools? Are some more credible than others? Transparency is important. How can NGOs and organizations do meta-data harvesting in the most efficient, effective ways – and disseminate in timely ways to cultural heritage managers, destinations? What about mapping?

Several examples were shared for reference:

- Sarasota collects zip codes from visitors to understand traveler demographics for more targeted marketing.
- San Francisco Travel measures the impact of scenery, accessibility.
- “Brown bag” programs offer ways for public involvement, community archaeology, and engagements. Volunteerism is another way to engage visitors and residents.
- Pittsburgh (CVB) conducts visitor profile surveys every quarter to discover visitor demographics and economic impact. The CVB also does seasonal visitation analysis via visitor zipcodes to understand impact of marketing. The National Park Service’s Heritage Area program builds in evaluation as part of the grantee agreement. They are currently bucketing and piloting a methodology for consistent data collection.

A list of specific recommendations generated during these sessions is included in the last section of this report.

Product Development

As delegates gathered to discuss product development for cultural heritage tourism, several best practices surfaced as examples for consideration. Participants also shared concerns regarding engagement with various audiences, and the symbiotic relationship that product development has with marketing. The discussions also focused on the unique needs for balancing preservation, capacity and cultural sensitivity with promotion.

Conversation highlights:

- Engaging local residents: The resident is an important “local visitor” – just consider the impact of “staycations” – but also as potential ambassadors (or naysayers), influencing ‘visiting friends and relatives’ and advocating for cultural heritage tourism (preservation, conservation, infrastructure, hospitality, authenticity, investment, capacity-driven development, governance and pro-active planning). What are some ways to introduce *place* to residents and transmit the idea of “no place like home?” What are specific strategies to connect with or impact the local community, airports?
- Tapping into technology: Everyone has a cell phone, so what are some of the best ways to utilize this resource? Also, for the 15-30 year olds, what type of application do they prefer? Is cable the best media for 30-50 year olds and network TV the preferred source for the 50+ market? Is this an option for translation (example: marketing

Franco-American Heritage by using cell phones for parts of interpretation). How are on-line companies like Groupon and Living Social a sales opportunity for cultural heritage tourism?

- Creating a critical mass to attract attention: The War of 1812 was mentioned as an example of an event that seeks national attention, yet may be perceived as too local. Conversations focused on strategies to link to bigger or adjacent markets to attract attention and develop a more substantial product/experience for the visitor. A challenge is how to measure the effectiveness or attribute the impact of a non-gated trail/region to the local economy, visitor experience. What is the value of creative wayfinding, packaging and infrastructure improvements (bike paths) to visitors, residents and how are they documented?
- Understanding the Customer: How are international visitors different from domestic travelers? What product/experiences do we need to offer to meet America's brand promise? What do African American and Hispanic visitors desire in U.S. cultural heritage experiences? Youth still want authentic, diverse "goose bump" experiences; how do you develop for the various age groups?
- Defining pre-product development "capacity," Recognizing that many sites or tours have or need limited access (to protect the resource or integrity of experience), understanding how to identify the optimum site capacity is vital in order to develop a product or experience for visitors that can be sustained. The Connecticut Humanities Council recommends and offers a "cluster" of manageable pieces that add up to a whole/larger experience.

Examples Shared:

- The "Lobster" application used by Maine fisheries to track "who, what, when" of receipts and restaurants.
- Indiana river used as a connector of activities.
- National Trust's *Survival Toolkit* showcases several development strategies to attract audiences: Missouri Historical Society has a "Time Traveler" program; Wyoming State Parks has a Volunteer Camper program with free living history program.
- New Bedford's Whaling uses a multi-faceted approach to interpret the environmental issues and offer the experiences in Portuguese.
- The Creole Nature Trail is now interpreting hurricanes and including wildlife refuges in their experiences.
- South Carolina funds activities upfront and then conducts capacity building, planning and implementation concurrently.

A list of specific recommendations generated during these sessions is included in a separate "Next Steps" report.

Marketing

The first session focused on practical instruction for marketing cultural heritage tourism; the second session discussed strategies for a national brand to market America globally, and the role of cultural heritage in distinguishing the U.S. identity from other international destinations.

New Media

As expected, a great deal of the first session's discussion centered on the role of new media. Social media can build strategy, interact with followers and build on relationships. Twitter, Facebook, YouTube, Flickr (photo sharing site) are all online outlets to explore. Groupon and Living Social are new sales outlets for membership discounts, attraction/package tour specials and other promotional offers that can be tracked. More destinations are shifting traditional print strategies to online; an example is use of e-newsletters and QR codes to inform consumers about events, discounts and other news. TripAdvisor is well known for its consumer-generated content, similar types of reviews can be integrated into individual websites; other social media sources can promote one's good experience. Four Square can contribute to individual branding. Delegates recognized, though, that social media is not free; time is required to manage sources. Many destinations now have social media staff – communications, media director, office of social media – to strategize and manage programs and outcomes. Destinations/attractions/sites should not abandon traditional marketing methods solely for social media platforms, but instead use a mix of strategies to communicate with customers and stakeholders.

Marketing Culture

Delegates discussed the different ways to market culture: themed tours, walking/biking tours, promotion of neighborhood culture, event marketing, newspapers and websites. Research is important, especially to determine if visitors intend to return, revisit a destination. The four parts of branding were also discussed: 1) identity; 2) product; 3) experience; and 4) memory. To build the brand, delegates recommended videos and utilizing non-traditional outlets. In the United States, "we need to value and to learn to value what we have. Sometimes it is seen that great need inspires great creativity. Example: Dickinson County in Appalachia."

Positioning culture as a desired and important part of travel was discussed. Delegates also focused on authenticity, the value of uniqueness – over "chains" – as strategies to define the economic impact on the community and also as the essence of travel. A U.S. Secretary of Culture, or some other national level voice for cultural heritage, is needed. Participants recognized that there is no mutuality in cultural heritage, it is very segmented with no unity, and thus has no central voice. There is also no formal structure to recognize the arts as a major component/contributor to the travel and tourism industry. Participation in the CTP will help raise awareness for cultural heritage, but who will pay for it and how do we go about partnering with this entity?

Collaboration

Delegates in the second session debated who leads and is responsible for a national marketing strategy. The United States has national products, international products – such as World Heritage Sites, National Park System Trails – that need to be promoted; is it the National Park Service's job to do this? No money is currently available to market these sites/experiences that have global appeal.

Perhaps cultural heritage tourism needs to look at other industries and organizations – such as medical, environmental – and political campaigns as possible examples of strategies for rallying around a collective effort and identity. There is a desire, need to change (or broaden)

the international image of the U.S. to be more than just Disney World. Delegates recognize that there needs to be passion for participation, to come together and send a message inviting “what does this mean to you?” “What is your America? Discover America.” The National Trust’s campaign, *This Place Matters*, is one example of a central campaign. Discussion ensued regarding the formation of an umbrella organization to market American culture heritage, although starting (and funding) another entity may not be viable. Some delegates also cautioned about being too market driven at the expense of risking product authenticity, integrity, quality and sustainability.

Next Steps

A closing session offered delegates an overview of the major points covered in the session groups. It also allowed participants the chance to share additional ideas, reflect on discussions, offer opinions and suggest next steps.

A list of initial ideas was generated for voting by delegates to help identify priorities. These ideas represent the foundation for developing a more detailed roadmap for advancing cultural heritage tourism in the United States.

Priorities (listed in order of importance)

1. Cultural/Heritage/Arts “campaign manager” to represent CHT organizations nationally. This manager or organization would need a budget for implementing activities on a national level. Regional partners serve as pipelines for information flow and stakeholder engagement/involvement; consider regional versions of the CHT Exchange to engage larger audiences around geographic-specific issues. Design a national campaign to coordinate message and action plan and/or develop a national project.
2. Continue and expand conversations, communication, networking and meeting; maintain and expand web-based conversations, including the ability to share case studies and best practices.
3. Focus on developing/delivering consistent national, state, and local research – with particular emphasis on economic impact of cultural heritage tourism.
4. Expand and maintain a comprehensive “Resource Guide” for use by cultural heritage tourism providers, stakeholders, volunteers, and industry.
5. Design and offer a comprehensive Technical Assistance Program to provide expert talent on all aspects of cultural heritage tourism research, development, marketing, management, and policy. Need for training in use of social media was recognized.
6. Participate/influence the activities/policies of the Corporation for Travel Promotion. Also expand voice of cultural heritage tourism with the Tourism Policy Council.

7. Motivate members of Congress to participate in the Travel & Tourism Caucus. Help educate members about the importance of Cultural Heritage Tourism and the need/opportunity for participation in Arts & Preservation caucuses as well.
8. Adopt guidelines/criteria/principles for authentic, sustainable, integrity and understanding of Cultural Heritage Tourism, engaging and respecting diverse groups who contribute to the sector.

Other recommendations and big ideas generated from the discussions focus on policy, research, practical applications in product development and marketing, communications and resources.

In closing, delegates were encouraged to make personal pledges as a commitment to help keep the conversations moving forward and to expand the network of colleagues for engagement. Of the participants, 43 delegates targeted specific actions to implement. These pledges will be tracked by organizers and shared with participants as completed.

*Review “CHT Online Survey Results” and “Next Steps” Reports posted on www.chtexchange.com
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