



From mid-February to early May 2011, more than 240 cultural heritage tourism practitioners and stakeholders completed a 16-question online survey to share their opinions, ideas and issues related to advancing the industry segment. The analysis presented below offers highlights and suggestions for use by federal agencies, national organizations, states and other participants engaged in cultural heritage tourism. Many of these findings were used as the foundation for discussions at the Cultural Heritage Tourism Exchange on May 3, 2011 in Washington, DC and mirror the recommendations resulting from that one-day event.

Major Survey Findings

Respondents said the three most important issues facing cultural heritage tourism in their agency, organization or business are:

- 1) Funding
- 2) Lack of research data or information
- 3) Education about relevance/importance of cultural heritage tourism

Overwhelmingly, funding is a key issue – more than 27% of the respondents specifically mentioned it as their first issue. Other descriptions referenced the need to replace disappearing federal and state funds. Some respondents mentioned specific uses for funding: promotion, interpretation, preservation and restoration, development, maintenance and management. Securing funds for operations is increasingly difficult and impacts ability to hire/retain staff.

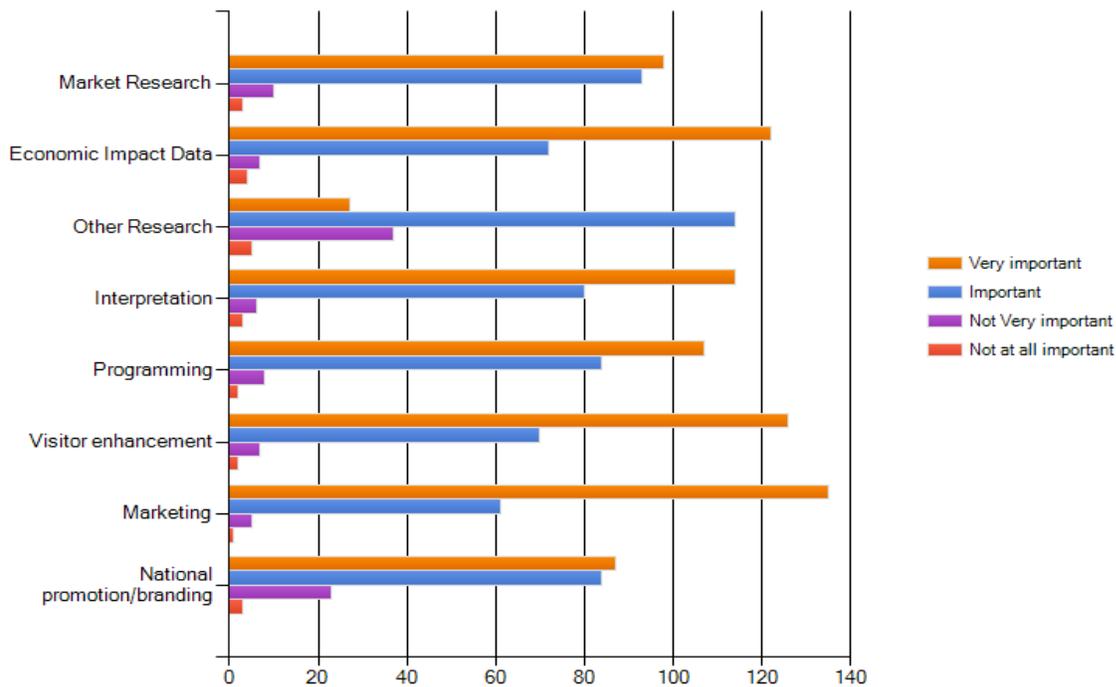
Research available in various forms (economic impact, trending, visitor profile) and at various levels (local, state, national) is a desire by a majority of respondents. Research is perceived as the primary tool for educating budget officers, elected officials, and local citizens about the relevance/importance of cultural heritage to tourism, economic growth and community. Research is also valuable to guide development and marketing strategies.

Several respondents also cited the need for a uniform definition to use in research and education. One respondent requested, “that the arts are included in the discussion.” Another suggested “an agreed upon definition about what is included – and as broad an encompassing definition as is legitimate – to insure that natural resources/interests understand that often these resources are the basis for the communities and the culture that emerged from and within them.”

Other issues cited include marketing locally and nationally; inconsistency in/need for emphasis on authenticity; interpretation accuracy and ownership; delivery of quality cultural heritage experiences that fulfill customer expectations; lack of leadership to direct efforts (nationally, state, locally); recognition/integration with other segments of the tourism industry, businesses and recreation entities; increasing visitation.

Important Components for Cultural Heritage Tourism

Respondents ranked components on their importance for advancing cultural heritage tourism in the U.S. The following chart indicates that marketing, visitor enhancement, and economic impact data are very important to respondents. Interpretation and programming are also very important to survey respondents.



Opportunities & Challenges

Respondents recognize that now is a time for creativity and innovation. Some respondents said high gas prices might force travelers to stay close to home, and therefore provide an opportunity for regional destinations to attract visitors and “increase awareness, especially in the area of stewardship.” Other respondents cite the weak dollar as an opportunity to attract more international visitors based on our “value.” Retiring baby boomers are a recognized audience to tap for visitation.

The following two opportunities, however, ranked highest in the survey results:

1. **Use of Social Media.** Respondents consider social media as the greatest opportunity for cultural heritage tourism. Almost one quarter of respondents see the Internet as

the primary communication tool that levels the playing field, provides the chance to reach broader audiences and build “community” around interests. Maximizing use of technology is vital to reach new audiences.

2. **Partnerships** and collaboration. One fifth of respondents see partnerships as an opportunity to leverage resources, expand quality and quantity of experiences, and demonstrate strength (in numbers).

Education of youth was recognized as both an opportunity and a challenge. Respondents heralded youth as the travelers of tomorrow; they also lamented that “without an understanding or appreciation of cultural heritage, the next generation may not care about it.” Integration into educational curriculum is necessary to help students (K-college) engage in, visibly participate in cultural heritage tourism. “Visitors hate history because it was, and still is, poorly taught as memorization of isolated dates and names.”

Major challenges include:

1. **Competition.** Vying for visitor’s attention, away from other media and tourism segments is more difficult. A few respondents also suggested competition is among cultural heritage partners, working in silos or at cross-purposes rather than collaborating to combine activities into integrated experiences or programs.
2. **Myths and Misconceptions.** Several respondents mentioned the need to overcome certain attitudes and opinions about the arts and historic places as “elitist.” Other respondents shared that visitors consider cultural heritage “boring”, as “outdated/uninteresting, so unnecessary.” Also, the mindset that “cultural heritage tourism isn’t economic development” reinforces the major issues listed above.

Respondents also expressed the need for museums, sites and attractions to **move from static presentations and exhibits to more engaging and relevant experiences.** “Changing the hands-off mentality to a more experiential visitor experience” and “designing programs that meet the visitor’s expectations, preferences, and needs – not the designers” reflects the change in interpretation needs and product development strategies.

Thought-leaders in Cultural Heritage Tourism

The **National Trust for Historic Preservation** received the greatest number of mentions when prompted to list current thought leaders in cultural heritage tourism; more than one quarter of respondents listed the national non-profit organization as a leader. Other recognized thought leaders, listed in order of number of mentions, include:

- National Park Service (park system)
- State Tourism Offices
- Historical Societies
- Convention & Visitors Bureaus
- Museums
- National Heritage Areas
- County Commissions

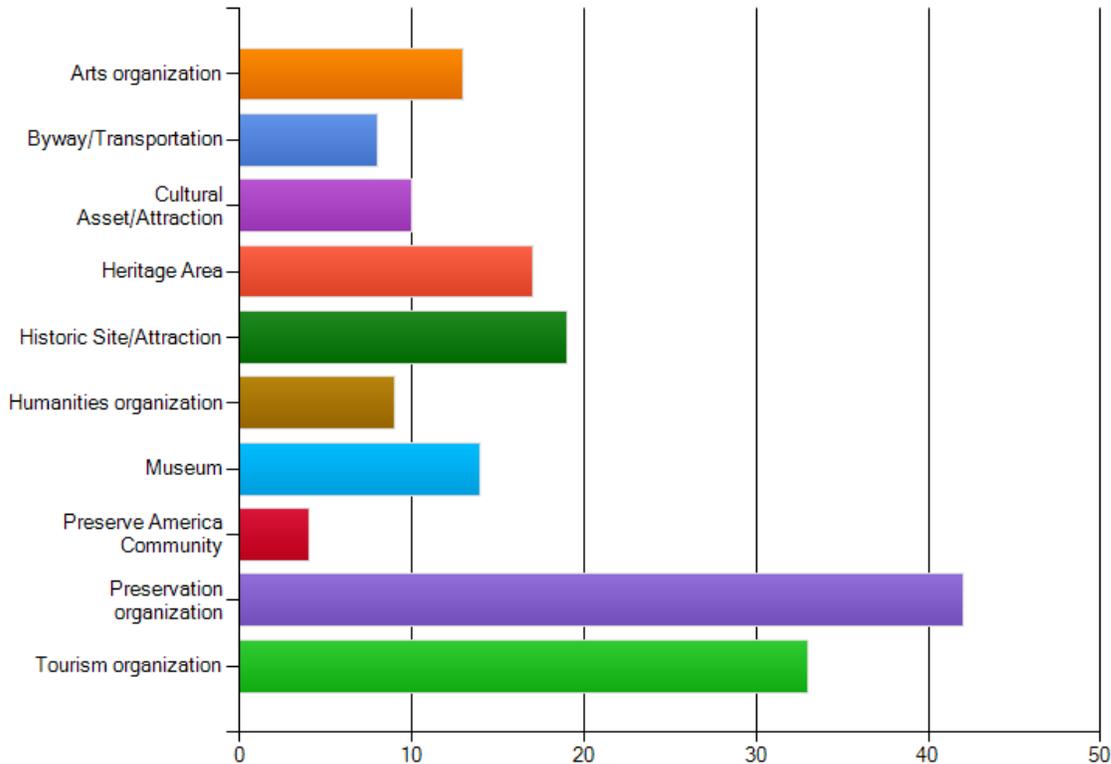
A total of 34 organizations or entities and 210 individuals were identified as thought leaders in cultural heritage tourism. These persons or representatives from the organizations will be invited to join future Exchanges and on-line discussions.

About the Respondents

Representing 42 states, almost half of the respondents work in non-profit or not-for-profit organizations; 40% work in government; 12% work in the private sector.

Respondents cover a lot of territory: 25% work locally; 22% work at the region level; 23% work at the state level; 10% work across state borders, at the regional multi-state level; and 20% work at the national level.

The respondents indicate their segment/field of cultural heritage tourism as:



Almost three-quarters of all respondents said their organization has planned a major initiative to occur in the next 18 months. Many of the events are related to commemorations: the 150th Anniversary of the Civil War, the War of 1812 Bicentennial, and 200th anniversary of steam travel on the Mississippi in 2011. Pending permission, a complete list of activities will be posted on the CHT Exchange website for reference.

For more information about this survey or the Cultural Heritage Tourism Exchange, please contact Cheryl Hargrove at info@chtexchange.com or phone 202-547-0959. Visit www.chtexchange.com for additional updates and information.