AN EVERGREEN APPROACH TO CULTURAL HERITAGE TOURISM

March 2017 – Bellingham, Washington
Cultural Heritage Tourism

National Trust for Historic Preservation

- Traveling to experience the places and activities that authentically represent the stories and people of the past and present.

Inclusive Definition:

- It includes Historic, Cultural, Natural and Intangible Resources unique and distinctive to the destination, both traditional and contemporary.
Travel directed toward experiencing the history, art and culture of a place

“Culture” in this context is broadly defined to include:

- All forms of traditional and contemporary arts such as sculpture, painting, photography, music, performance, dance and theatre
- Heritage, which includes historic and prehistoric sites, architecture, native peoples, and traditional events
- Culture and heritage may take the form of place-based activities and events unique to the area such as farmers’ markets, Bellingham Highland Games, the Lummi Stommish, etc.
The New Cultural Heritage Traveler

- Prefer leisure travel that is educational (56%)
- 43% spend more money on cultural and heritage activities while on trip
- Want to engage with locals; “do” something
- 40% will pay more for distinctive c/h lodging

- On-line important for:
  - Trip planning
  - Community engagement
  - User-generated content

[Social media icons]
The Cultural Heritage Traveler (cont.)

- Older (49 vs. 47); Affluent
- Educated: Graduate +
- Baby Boomers still dominate
- Increase in Gen X (up to 33%)
- Multi-generational also on rise

**Families:** 1/3 of U.S. population but make half of all visits to attractions. Priorities are: togetherness, fun, variety, unique experiences, learn something new, go someplace new

*Source: PGAV Destinations 2013*
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  - Trip planning
  - Community engagement
  - Consumer content generation
Top activities of Cultural Heritage Travelers:

1. Visiting historic sites (66%)
2. Participating in historical re-enactments (64%)
3. Visiting art museums/galleries (54%)
4. Attending an art/craft fair or festival (45%)
5. Attending a professional dance performance (44%)
6. Visiting state/national parks (41%)
7. Shopping in museum stores (32%)
8. Exploring urban neighborhoods (30%)

Source: Mandala Research 2009
Cultural Heritage behaviors of General Leisure Travelers

While culture or heritage activities may not be the MOTIVATOR for the trip, travelers often engage in culture and heritage as part of their visit to a destination.

- Visited heritage buildings/historical buildings (42%)
- Attended cultural/heritage fair, festival (40%)
- Attended historical reenactments (38%)
- Participated in an organized tour of local history or culture (37%)
- Visited living history museums (37%)
- Took a tour focusing on local architecture (34%)
- Researched family history (32%)
- Shopped for items made by local artisans, craftspeople (31%)
- Visited farms and ranches (25%)
- Explored small towns (24%)
- Experienced local or regional cuisine for a unique and memorable experience (23%)
- Self guided walking tour (22%)

Source: Mandala Research LLC, 2013
Different Activities Appeal to Different Segments

- Matures visit historic sites and want scenic drives and local crafts
- Gen X and Y are more into nightlife
- All age groups want to experience the local cuisine

Source: The Culinary Traveler Study, 2013
The Generations: Different Travel Styles

Destination Analysts’ Traveler Psychographic Intensity™ indices show that members of the Millennial Generation are active, highly connected travelers with a desire for urban culture and culinary experiences. Baby Boomers are more interested in less active, rural experiences that yield a sense of exploration. GenX sits at the halfway point between the two generations, with one key unique differentiator, slightly higher levels of price sensitivity.

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### Average Traveler Psychographic Intensity™ Index score

- **Activity Seekers**: Prefers active vacations
- **Connectivity**: Connected during leisure travel and its planning
- **Travel Planning Intensity**: Intensively plan leisure travel
- **Nature Lovers**: Desires rural over urban travel experiences
- **Culinary Interest**: Food & cuisine driven traveler
- **Authenticity**: Wants the real destination vs. commercial tourism product
- **Cultural Interest**: Wants to engage a destination’s arts and culture assets
- **Price Sensitivity**: Concern about pricing drives demand for leisure travel experiences
- **Exploration Hungry**: Gains pleasure from exploration while traveling

- **Baby Boomers**
- **Gen X**
- **Millennials**
The Global Appeal

- 45.6% of all overseas leisure travelers to the U.S. visit historical places
- 27.7% visit art galleries or museums
- 28.1% visit cultural/heritage sites
- the international cultural traveler stays 3 nights longer than general international visitors to the U.S.

Source: 2010 Overseas Visitor Profile Reports, OTTI, US Dept of Commerce
TOURISM DOES NOT GO TO A CITY THAT HAS LOST ITS SOUL.

- Arthur Frommer
4 Trends Impacting CHT

Evergreen Experiences
Use of Technology
Rise of the Disruptors
Tracking Consumer Trends

THE FUTURE

TRENDS AND CHANGE TO WATCH IN 2016

INNOVATION GROUP J. WALTER THOMPSON INTELLIGENCE

HTC Partners HERITAGE TOURISM CULTURE
11 Trends for 2017 from JWTIntelligence.com

1. Experiences over Goods
2. The Attention Economy
3. Civic data
4. Wifi disrupters: Unplugged!
5. Augmented Reality
6. Techucation
7. Gen Z Hotels
8. Polar travel
9. Elemental hospitality
10. DNA tourism
11. Travel action
2014 Traveler Happiness Study - one of the four key ingredients in having a happy travel experience was making a local connection and creating a connection with people and places, cultures and histories allows us to open our minds and increase our chances of experiencing happiness.

Global tour operators are under pressure to introduce into their itineraries exclusive, up-close-and-personal encounters with the people and cultures that define their destinations.
Customers Discuss Experiences

“Whatever you are, be a good one.”
- Abraham Lincoln

- 86% of consumers will pay more for a better customer experience
  (RightNow Customer Experience Impact Report, 2011)

- 24% of consumers who had unsatisfactory experiences shared them through social networks in 2010 – a 50% increase over 2009
  (Forrester Technographics Customer Experience Online Survey)

- It takes 12 positive experiences to make up for one negative experience
  (Source: “Understanding Customers” by Ruby Newell-Legner)
In North America, Europe and Latin America, however, differences in sustainability sentiment between Millennial and Generation X respondents are largely negligible and only about two times greater than Baby Boomer respondents.
Trend 2: Evergreen Experiences

- Offered consistently year-round
- Expands and celebrates seasonality, rather than limiting it
- Provides reasons for visitors to come back often
- Focuses on value rather than price
- Plays to destination strengths
Growing Evergreen Experiences

- Offer consistently excellent customer service everyday
- Give samples all year round
- Schedule sensory experiences – music, public art, food – every day (and evening)
- Incentivize self-guided walking tours
- Expand tours to include retail shops, restaurants, other downtown attractions
- Offer packing and shipping for purchases
- Provide bounce-back coupons (a reason to return)
Trend 3: Growth of Sharing Economy

Source: JWT April Trend Report – Travel Changing Course
PEER-POWERED TRAVEL

MANIFESTATIONS: P2P hospitality

Peer-to-peer lodging companies are challenging traditional hotels by offering a wider variety of accommodations—from a couch to a room to full homes—at generally lower prices. Couchsurfing, initially run as a nonprofit, launched the idea of strangers hosting travelers nearly a decade ago.

9flats.com
Claims to be the European leader in private short-term rentals, having recently acquired Airbnb rival iStopOver.

airbnb
Connects travelers looking for accommodations with people who have rooms, apartments or homes (and houseboats and treehouses) to rent.

Couchsurfing
The Craigslist of travel connects hosts with travelers looking for a free bed or couch.

CampinmyGarden
Enables people to rent their backyards as what it calls “micro-campsites.”

Wimdu
An Airbnb imitator and one of the largest European players in this space.
People-First Tourism: www.peoplefirsttourism.com

- P1T sort of a “dating web site – pairing up adventurous and socially conscious tourists with charismatic micro-entrepreneurs”
- Uses cell phone access and web-to-cell technology to facilitate client-to-entrepreneur communications and bookings
- Travelers interested in supporting local economies + wanting meaningful experiences, register on the P1T site and search providers geographically
Peer-to-Peer marketplace growing

- Travelers expect highly personal experiences and customer service – social media provides insights into desires and product development

- Moving beyond traditional consumer goods to travel and transportation

- Organizing, connecting and engaging through social media for a new “Trust Economy”

- Growth due to distrust in institutions and craving for authenticity
Trend 4: Use of Technology

- CHT: 75% use Facebook
- CHT: 40% use YouTube
- More than ¼ of CH travelers report they visit websites via a QR code using their smart phones.
- 3x more likely to use their mobile devices to learn about events, get recommendations
- More frequently book dining and attraction tickets via mobile devices (Smart phones & tablets)

Source: Mandala Research, LLC 2013
Travel Media & Technology

Resources and Services Used to Plan Leisure Travel

Q: In the past 12 months, which of these Internet technologies or services have you used to help plan your leisure travel? (Select all that apply)

- Travel-related radio program
- iPad or tablet computer
- User-generated reviews of destinations or activities
- User-generated reviews of restaurants or activities
- User-generated reviews of hotels
- User-generated travel itinerary or blog
- Used Facebook
- Used Twitter
- Used Instagram
- Used Twitter or Periscope
- Became a friend or follower of destination on social media
- Social media sharing websites
- Social bookmarking websites
- Social media websites
- DMO website
- Mobile phone to access travel info
- Travel-related APP on tablet or mobile device
- Online videos
- Audio files/podcasts
- Group discount website
- Opinions of friends, colleagues, or relatives
- Travel-related programming on TV
- Travel or lifestyle magazine
- Newspaper travel section
- Commercial guidebook
- DMO print publication
- Direct mail piece
- Travel agent
- Travel-related radio program

DMO Website Use in Travel Planning

Q: In the past 12 months, have you used the official WEBSITE of a destination’s local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?

- Yes: 59.4%
- No: 49.8%
- I Don’t Know: 30.8%

Q: At which point in your travel planning did you use the website of a destination’s visitors or convention bureau (or chamber of commerce) or state or national government travel office? (Select all that apply)

- Before I had decided to travel to the destination: 9.4%
- After I decided to travel to the destination: 18.4%
- While I was in the destination on my trip: 15.4%

By comparison, 13.7% of travelers used a digital DMO guide.

Destination Analysts’

State of American Traveler

January 2016
New Technology Options Available

- AR
- VR
- iPads
- Digital picture frames
- Holograms
- Robots
- Touch screen monitors
Dallas Museum of Art conducted landmark study from 2003-2009 of visitors and teachers.

- **Observers** – prefer guided experience; smARTphone Tours, wi-fi, and Q4tags
- **Participants** – connect through social activities (demonstrations, performances, readings); artists’ talks, videos
- **Independents** – very knowledgeable, less likely to use interactive resources
- **Enthusiasts** – participate in a wide variety of programming; frequent visitors asked to assess new exhibits
On line Research, Recommendations & Ratings

Storytelling becomes Story Involvement – a conversation with the customer

- Trip Advisor
- Yelp
- Squidoo
- Hubpages
- Wikipedia
- Discoverhistorictravel blog
- Travelandhistory blog
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Cultural Heritage Tourism Challenges

1. Increased competition, increased demand:
   - Over 2,000 historic downtowns and neighborhood commercial districts
   - 34,500 Museums
   - 80,000 properties listed on the National Register of Historic Places, representing 1.4 million individual resources
   - 49 National Heritage Areas

2. Homogenization forcing destinations to define “unique selling proposition”

3. Pressure to balance visitor needs with resident desires, environmental impact: Manage Capacity & Success
Cultural Heritage Tourism: Additional Challenges

- Commodification
- Declining funds for restoration, operations
- Tired exhibits, tours
- Lack of authentic messaging, marketing
- Lack of diversity
- “Non-profit” vs. “for profit” business philosophy
- Engaging and educating youth (about importance, relevance of U.S. culture & heritage)
1. Preservation and promotion expands beyond bricks and mortar, and geographic boundaries - Cultural heritage goes beyond bricks and mortar

2. “Stories” more important than “things”

3. Growth in Educational Tours
   - National Trust increased its study tour program from 1 in 1979 to 78 in 2014, including 11 domestic
   - Educational Travel Conference now in 31st year, 2100 delegates
What do these trends mean NOW for Cultural Heritage Tourism Destinations?

- No “one-size-fits-all” strategy – customization is key for all aspects of cultural heritage tourism
- Planning must focus on core principles and desired outcomes for positive triple bottom line
- Identify and fund priorities first
- Implement flexible strategies without compromising integrity of resources, experiences
- Need to constantly manage, measure impact, ROI
“ACTION IS THE FOUNDATIONAL KEY TO ALL SUCCESS.”

- Pablo Picasso
CHT Planning: 5 Steps

1. Identify and Analyze the Potential
2. Plan and Engage
3. Develop Authentically
4. Market for Positive Impact
5. Manage for Growth and Sustainability
1. Identify and Analyze the Potential

- Create an extensive inventory
- Define “visitor readiness”
- Identify additional opportunities for development, interpretation, enhancement, training, visitor services
- Conduct a SWOT Analysis
Asset Categories

Art Categories
• Performing Arts
• Visual Arts
• Educational & Maker Arts
• Culinary Arts

Culture Categories
• Cultural sites
• Cultural centers
• Cultural Events

Heritage Categories
• Historic Sites
• Historic Activities
• Historic Events
# Arts defined

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<tr>
<th>Performing Arts</th>
<th>Visual Arts</th>
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<tr>
<td>□ Dance</td>
<td>□ Folk &amp; Fine Arts</td>
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<td>□ Music</td>
<td>□ Painting</td>
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<td>□ Theatres</td>
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<td>□ Film</td>
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<td>□ Photography</td>
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Arts defined (continued)

**Educational & Maker Arts**
- Museums
- Art Centers
- Libraries
- Literature
- Classes/experiences for children, adults

**Culinary Arts**
- Locally produced food
- Locally produced beer
- Locally produced wine
- Locally produced spirits
Culture Sites, Centers, Events defined

- Native American and other traditional events, festivals, programs
- Farmers Markets
- Museums
- Libraries
- Art/Cultural experiences
Historic Sites & Activities defined

- Walking tours
- Museums
- House museums
- Historic districts
- Architecture
- Farmsteads
- Heritage Trails
- Maritime assets
- Heritage events & programs
Determine Visitor Readiness

Three categories:

- Ready for Visitors
- Almost Ready
- Needs Development
SWOT Assessment

**INTERNAL**

- Strengths
  - Attractors, Attractions
  - Leadership
  - Solvency
  - Stewardship

- Weaknesses

**EXTERNAL**

- Opportunities
  - Buy Local, Source Local
  - Travel with/for purpose
  - Use of technology
  - Storytelling

- Threats/Challenges
2. Plan and Engage

- Leadership Capacity
- Different Terminology
- Fragmentation
- Importance of Cultural Integrity
- Different Priorities
- Fear of unsatisfactory outcomes
Engage all CHT Stakeholders for Sustainability

An Integrated Approach:

- Tourism DMOs
- Planning Offices, Architects
- Transportation Agencies
- Marketing Departments
- Preservation & Conservation Agencies
- Interpretation Programs (Arts & Humanities)
- Recreation & Parks
- Business & Finance (Banks, Investors)
- Government/ Elected Officials
- Product SME (Artists, Retailers, Farmers, Restauranteurs, Vintners, Hoteliers, B&Bs, etc.)
Developing a Stakeholder Engagement Strategy

1. **Identify stakeholders**: are they equal or vary in levels of engagement required/desired

2. **Assess their attitude toward cultural tourism**: positive, negative, neutral, uninformed

3. **Identify the best way to communicate with each stakeholder**: email, in-person meetings, surveys, telephone interviews, social media
Bellingham Cultural Heritage Tourism Planning Process: January – August 2017

1. Inventory & Analysis
   - January – March
   - OUTCOME: Analysis Report

2. Stakeholder Engagement
   - January – March
   - OUTCOME: Stakeholder Recap

3. Market Trends & Segmentation
   - March – April
   - OUTCOME: Market Trends

4. Defined Goals & Outcomes
   - March – June
   - OUTCOME: SWOT Analysis, Goals & Obj

5. CHT Strategic Plan
   - April – July
   - OUTCOME: Final CHT Plan

6. Year One Action Plan
   - August
   - OUTCOME: Priority Projects, Specific Action Plans
3. Develop Authentic Experiences

- Attractions
  - Cultural
  - Historic
  - Natural
- Activities: Day & Night
- Accommodations
- Retail shopping
- Dining
- Entertainment Venues
“WE TAKE STOCK OF A CITY LIKE WE TAKE STOCK OF A MAN. THE CLOTHES AND APPEARANCE ARE THE EXTERNALS BY WHICH WE JUDGE.”

- Mark Twain, New York
  December 6, 1900
The Holistic Approach

Authentic Experience

- Local Restaurants, Diners, Farmers Markets, Specialty Foods
- Local Shops, Art Galleries/ Studios, Main Streets
- Cultural Heritage Attractions, Tours, Entertainment, Activities, Neighborhoods
- Distinctive Lodging, Historic Hotels, Local Rentals (Airbnb, VRBO)
- Gateway, Signage, Visitor Information Center, Transportation
- GREAT HOSTS!

HTC Partners
HERITAGE TOURISM CULTURE
SHOPPING: What do travelers want?

- Stores travelers do not have at home (73%)
- Items travelers cannot get at home (67%)
- Items that represent the destination travelers are visiting (53%)
- A unique shopping atmosphere (52%)

(Source: US Travel Association)

Museum Store Statistics:
Average Visitation – 85,000 Visitors
Annual Sales: $200,000 +
Up 16.5% since 2006

Source: 2009 Museum Store Association Retail Industry Report
Create the Experience

- Set **learning objectives** based on what interests your visitors — **Goal: Change What They Know**
- Set **emotional objectives** to connect with, inspire your visitor — **Goal: Change How They Feel**
- Set **behavioral objectives** to affect change — **Goal: Compel How They Act**

*Source: John Veverka, Certified Interpretation Specialist*
Interpretation: Telling YOUR Story

- Understanding Your Visitor
- Designing Relevant Learning Programs
- Delivering Provocative Experiences
- Creating Appropriate Messages

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<th>OLD</th>
<th>NEW</th>
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<tr>
<td>Names &amp; Dates</td>
<td>The Story of “Why?”</td>
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<tr>
<td>Focus on “things” – artifacts, décor</td>
<td>The People and their lives</td>
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<tr>
<td>Passive</td>
<td>Interactive</td>
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<tr>
<td>Only the Good</td>
<td>The Good, the Bad, the Ugly</td>
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<tr>
<td>Static Exhibits</td>
<td>Immersion of the Scenes</td>
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Answer These Questions

1. **Significance**: Why is your destination important?
2. **Reasons**: Why are you interpreting the destination?
3. **Meanings**: What do you wish to communicate?
4. **Audience**: Who is your target audience(s)?
5. **Key messages**: Are stories relevant to your audience?
6. **Goals**: What will visitors learn, gain, change?
7. **Critical review**: What do they already know? Where are the information gaps?

Source: Ideas for Interpreting Heritage Sites, Irish Walled Towns Network
Factual, Story-based Experiences that Engage, Educate, Entertain, Evoke

- Appeal to the five senses
- Cater to specific audience needs: interactive for kids/families; expert lecturers and guides for special interest groups
- Provide a unique perspective - your “point of difference” from other destinations
- Relate past to the present
- Tap local “culture” — music, dance, sculpture, literature, cuisine — to tell the story
- Make it personal!
Interpreting Human Legacies

- Victoria’s proposed Cultural Heritage Route includes linking a National Landmark with a waterfront walkway named after musician/composer David Foster, a native of Victoria.
- David Foster Way will include interpretive signage and public art paying homage to the artist’s musical legacy.
Asheville, NC

- Started in 2000 when hoteliers agreed to increase room tax from three to four percent, with the additional cent dedicated to capital projects.
- Last year awarded $2.25 million – total of $14+ million since inception – for community projects.
- Invests in products that increase overnight stays, especially in soft or off season, or enhance destination competitiveness.
Farm-to-Table Dinner on Main Street

- Jonesborough, TN (population 5,174)
- Farm-to-table dinners raised more than $10,000 for the local farmers’ market
- 2012: Tickets @ $75 each sold out in 3 hours
- 155 people attended
4. Marketing for Positive Impact

- Market Research
- Public Relations
- Advertising
- Promotions (trade, consumer)
- Collateral Materials
- Distribution Channels
  - Digital
  - Traditional

Integrated Cultural Heritage Tourism Marketing Plan
“Precision marketing and knowing your consumers intimately will yield the greatest results,” said Fenton. “It’s no longer a question if consumers care about social impact. Consumers do care and show they do through their actions. The question is ‘how is your brand effectively creating shared value by marrying the appropriate social cause and consumer segments?’.”

The best initiatives are those that appeal to a heterogeneous group of buyers, but a keen focus on your most passionate (and profitable) consumer segments is also vital.
Digital Marketing

- Promotion of products or brands via one or more forms of electronic media:
  - Internet
  - Social Media
  - Mobile phones
  - Electronic billboards
  - Digital TV and Radio Channels
- Advertising, Influencer Marketers (Blog), Advocacy, Polls/Surveys

#Socialnomics
Design Guidelines

- Philosophy for using logo and other graphic elements to brand an attraction or destination
- Ensures consistency in visual messaging across platforms
- Helps partners cross-market
5. Manage for Growth & Sustainability

### Capacity
- Visitation: Spend more, Stay longer
- Evergreen Marketing to Capacity

### Authenticity
- Credibility of Experience
- Integrity gives Competitive Advantage

### Quality
- Consistency of Products, Services
- Opportunity to Exceed Expectations

Balance of Benefits: Resident, Resource, Visitor
Global Sustainable Tourism
Destination Criteria

- 37 criteria specific to:
  - Demonstrate sustainable destination management,
  - Maximize economic benefits to the host community and minimize negative impacts
  - Maximize benefits to communities, visitors and cultural heritage and minimize negative impacts
  - Maximize benefits to the environment and minimize negative impacts

Criteria is also available for hotels and accommodations.

Source: Global Sustainable Tourism Council, www.gstcouncil.org
TOURISM IS LIKE A FIRE ... it can cook your food it can burn your house down.
Tourism Management

Important to:
- Sustainability
- Brand equity
- Resident quality of life
- Desired visitor experiences

TRAVEL WEEKLY

Europe

Barcelona, Florence, Rome, Venice

Crowded cities moving to limit tourism growth

By Michelle Baran / January 31, 2017

Barcelona has sent a message to the travel industry: Tourism is not an inexhaustible resource that can grow unfettered without repercussions. Photo Credit: Shutterstock/Gusev Mikhail Evgenievich
Measure the Impact of CHT

- On the cultural heritage resource
- For the customer
- For travel industry partners
- For the cultural heritage institution, manager
- To the local, state, national economy
- On the quality of life for local residents
The Effort is Never Finished

- Pro-active planning averts potential problems
- May have to revisit similar situations during several life cycles to affect positive, sustainable change
- Education of new partners, generations of leaders is ongoing
5 Principles of CHT

1. Focus on Authenticity and Quality
2. Preserve and Protect Resources
3. Make Sites & Programs Come Alive
4. Find the Fit Between Community & Tourism
5. Collaborate
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