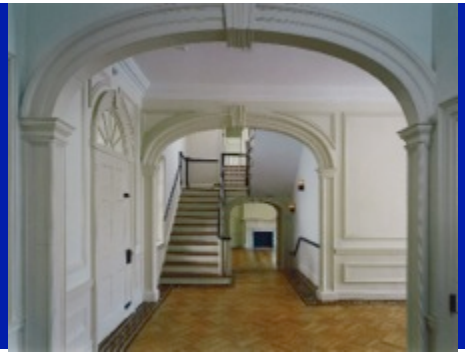
Heritage Tourism & Revolutionary War Sites



July 9-10, 2019

Crossroads of the American Revolution

HTC Partners
HERITAGE · TOURISM · CULTURE

Hunter Research, Inc.

Clarke Caton Hintz

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.

Broader Definition:

Heritage Tourism includes Historic, Cultural, Natural and Intangible Resources unique and distinctive to the destination and its peoples, both traditional and contemporary.

Heritage Tourism

Principles

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

Steps

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

The “Heritage Destination” Draw

Visitor’s Perspective

- ✓ Critical mass of activities and experiences for engagement
- ✓ “Different” from home
- ✓ Motivator(s): education, enjoyment, entertainment, relaxation
- ✓ Perceived value

Local Perspective

- ✓ New/Additional benefits: Positive brand
- ✓ Desired activities, services
- ✓ Economic impact
- ✓ Increased recognition for historical integrity, value (preservation, stewardship)

The Heritage Traveler

- Frequent traveler – 3.6 leisure trips vs. 3.4
- Spend more – $1,319 vs. $820
- 46% of total spent on activities, dining & shopping

76% of all U.S. leisure travelers

= $171 Billion US by

129.6 million adults annually

Source: Mandala Research, LLC 2013

The Heritage Traveler (cont.)

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

***Families**: Represent 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

Top Activities of 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

Heritage Behaviors of General Leisure Travelers

While history or heritage activities may not be the MOTIVATOR for the trip, travelers often engage in 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

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

Heritage Travelers' Use of Technology

- 75% use Facebook
- 40% use YouTube

Source: Mandala Research, LLC 2013

- 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 devises to learn about events, get recommendations
- More frequently book dining and attraction tickets via mobile devices (Smart phones & tablets)

The New 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 content generation

twitter

The Global Appeal

- **21,748,000 arrivals in 2017** (up one percent from 2016; almost double from 2005, but down from record visitation of 22,1512,000 in 2015)
- **Main purpose of trip in 2017**: 65% for vacation/holiday; 17.9% to visit friends/ relatives; 6.5% for business
- **Activity Participation while in U.S.:**
  - National Parks/Monuments: 62.5%
  - Art gallery/Museum: 50%
  - Historical Locations: 45.8%
  - Cultural/Ethnic Heritage Sites: 27.7%
  - Concert/Play/Musical: 26.6%

Different Activities Appeal to Different Segments

Matures visit historic sites and want scenic drives and local crafts

Gen X and Y are more into night life

All age groups want to experience the local cuisine

Source : The Culinary Traveler Study, 2013

Family Travel

- Prefer to travel when children are between 6 and 12 years of age
- 3.53 domestic trips and 1.25 international trips last year
- Highly value the educational and emotional benefits of travel
- Search engines are the most important information source
- Affordability is the most prominent challenge
- Taken in the past and plan to take again: day trip (75%); multi-day vacation in U.S. (71%); weekend getaway (70%); trip to see relatives (70%); museum/cultural attraction (65%)

Source: *US Family Travel Survey* (September 2015) Family Travel Association/NYU School of Professional Studies, Tisch Center for Hospitality and Tourism

U.S. Leisure Travelers

31.9% Visit Friends/Relatives
as **Main Purpose of Trip**

44.5% Visit Friends/Relatives
as **One of the Purposes of the Trip**

Source: 2015 Market Profile: U.S. Residents Leisure/VFR; NTTO
https://travel.trade.gov/outreachpages/download_data_table/2015-US-Leisure-VFR.pdf

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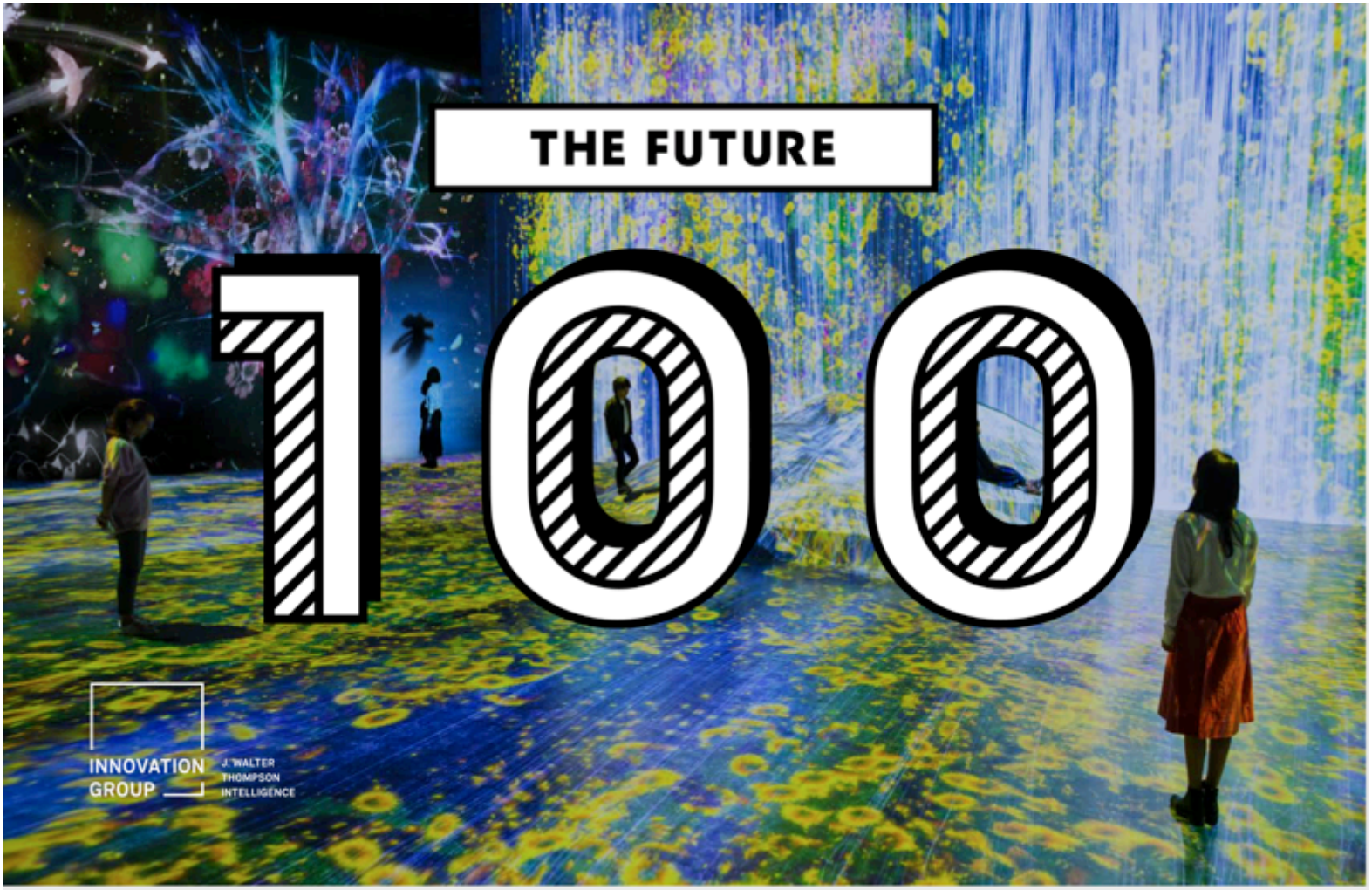
HERITAGE TOURISM TRENDS & OPPORTUNITIES

Tracking Consumer Trends



https://www.jwtintelligence.com/trend-reports/the-future-100-2019/

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JWT Intelligence: The Future 100

- Culture: Museum Futures, Instagram Backlash
- Travel/Hospitality: Immersive Public Landmarks; Editorial Travel Agents; Gen Z Travelers, Renaissance Neighborhoods
- Brands & Marketing: Grass Roots Brands
- Food/Drink: Clean Comfort Food
- Luxury: Wanderluxe, Diagnostic Travel, Luxury Loyalty; Energy-positive Hospitality
- Lifestyle: New Sustainability

Voice of the Visitor 2019

- More vacation days, fewer attractions
- 38% visit Historic Landmarks
- Leading Millennials (27-37) and Trailing Millennials (18-26) differ: Not one size
- **Most Important:**
  - **29% a Place where they feel welcome**
  - **27% allows me to do something I can't do on an everyday basis**
- Hispanic, Black, Asian travel profiles are different

Changing Demographics Impact Visitation

- **White Americans visited Historic Landmarks/ Places 19% more than minorities in 2018**
- According to Brookings Institution, America is on track to be **minority white** by 2045
- **America's Hispanic population** – on track to be the "minority majority" – has grown sixfold since 1970 to an estimated 57.4 million
- Minority groups account for 21% of attraction visitation in 2018 – most popular are zoos, aquariums, children's museums, science centers, dinner theatres/cruises, large-format screen theatres

Customers Discuss Experiences

"Whatever you are, be a good one."

- Abraham Lincoln

- 86% of consumers will pay more for a better customer experience

  (Source: 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

  (Source: *Forrester Technographics Customer Experience Online Survey)*

- It takes12 positive experiences to make up for one negative experience

  (Source: "Understanding Customers" by Ruby Newell-Legner)

Capacity Management

- Carrying Capacity
- Infrastructure Needs
- Resource Stewardship

How Trends impact Heritage Tourism Sites

- No “one-size-fits-all” strategy – customization is key for all aspects of heritage tourism
- Planning must focus on core principles and desired outcomes for positive triple bottom line
- Preserve and Protect, Cultivate Stewardship and Appreciation for Heritage Resources
- Identify and fund priorities first
- Implement flexible strategies without compromising integrity of resources, experiences
- Need to constantly manage, measure impact, ROI

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SITE READINESS

Heritage Tourism Responsibilities

- **Visitor Readiness -** Delivery of outstanding and appropriate experiences at every point of contact with visitors <u>at each stage</u> of their destination experience.

- **Market Readiness** – The creation and delivery of memorable, value added, high quality products and experiences that **meet and exceed the expectations of <u>various types of visitors</u>**

Interpretation: Telling YOUR Story(s)

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

OLD	NEW
Names & Dates	The Story of "Why?"
Focus on "things" – artifacts, décor	The People and their lives
Passive	Interactive
Only the Good	The Good, the Bad, the Ugly
Static Exhibits	Immersion of the Scenes

Good/Compelling Stories

- Make scattered bits of experience and information **coherent**
- Break what's complex into **manageable** bits
- Identify patterns in the world around us (**relevance**)
- **Share knowledge and learn** from each other's experience
- Anchor our **beliefs**
- Give our lives a continuous, recognizable **shape**
- **Teach** our children how to live
- **Remind** us how we fit into the world.

Factual, Story-based Experiences:

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!

Themed Programs to Attract Repeat Visitation

- People stories:
  - Profile a soldier
  - Profile a local family impacted by the war
  - Profile a local business
  - Profile role or impact on women, children
- Site/Area Stories:
  - Architecture, archaeology
  - Environmental impacts of war
  - Post-war development

Modify Story for Different Audiences

Children

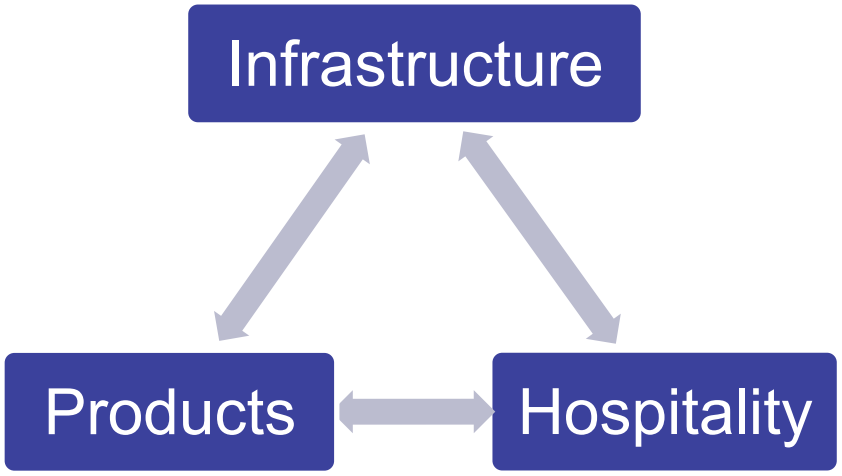
- Size down
- Add tons of physical activity and sensory experiences
- Make sure they can improvise, feel the joy

Seniors

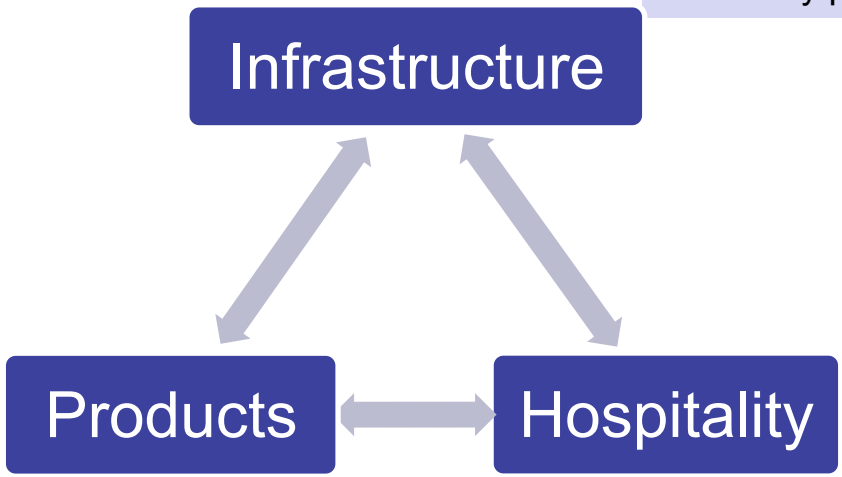
- Think about ergonomics
- Clarity (similar colors close together become harder to differentiate)
- Consider the rich life experiences they bring to your story

Source: PGAV Destinology

On-Site Readiness



On-Site Readiness



✔ Attractive Entrance/ Public Spaces
✔ Wayfinding/Signage
✔ Road Conditions/Appearance
✔ Beautification
✔ Buildings in Good Condition
✔ Quality preservation/ guidelines

✔ Unique attractions, retail
✔ Diverse dining
✔ Entertainment/evening options
✔ Distinct lodging (if appropriate)
✔ Interesting Events & Festivals

✔ Welcoming, friendly residents
✔ Knowledgeable/informed staff
✔ Service-oriented front-line
✔ Strong leadership, organizations
✔ Market-facing policies

Visitor Readiness

- ✓Open when visitors travel (days, evenings, weekends)
- ✓Offer compelling and relevant activities, programs for all ages
- ✓Quality exhibits and good curatorial practices
- ✓Welcoming and trained staff
- ✓Provide visitor amenities (restrooms, parking)
- ✓Attractive, safe and well-maintained facilities (buildings, grounds)
- ✓Rotate programming to attract repeat visitors

Sustainable Heritage Tourism

Capacity
- Visitation: Less > More
- New ROI Model for Measurement

Authenticity
- Credibility of Experience
- Competitive Advantage

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

= Balance of Benefits to Site, Visitor, Resident and Community

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THE INVENTORY PROCESS

Site Readiness Evaluation of NJ's Revolutionary War Sites

Historic Preservation Architect:	Clarke Caton Hintz	John D. S. Hatch, FAIA – Partner-in-Charge Michael J. Hanrahan, AIA – Project Manager
Heritage Tourism Consultant:	HTC Partners HERITAGE · TOURISM · CULTURE	Cheryl Hargrove – Partner-in-Charge
Cultural Resource Assessment:	**Hunter Research, Inc.**	Richard Hunter – Partner-in-Charge Patricia Madrigal – Project Manager
Cost Estimator:		Frank Paschen – Project Manager

Why This Team?

- Extensive Historic Preservation experience
- Unmatched experience with historic sites, especially Revolutionary War sites, across New Jersey
- Remarkable national perspective on Heritage Tourism combined with deep statewide knowledge
- Service oriented firms that are committed to consistent, effective communication

CCH: Historic Preservation Architect

Provide preliminary assessment of all sites in each phase:

- Visit all sites in each phase
- Inspect building and systems conditions
- Assess site access and visitor infrastructure
- Review interpretive materials: Use HRI checklist
- Assess visitor readiness: Use HTC checklist
- Document conditions with checklists, written descriptions and photographs

Deliverable:

✓ *Comprehensive preliminary assessment of all sites*

✓*Provide information to Cost Estimator*

✓*Visitor Readiness Assessment Report*

HRI: Cultural Resource Assessment

Research all sites in each phase:

- Preparation of checklist for CCH
- Gather data on existing conditions at individual sites and compiling pre-existing documentation about individual sites.
- Historic interpretive opportunities: Use information provided by CCH
- Preliminary archaeological assessments
- Visit Key Sites for follow up information

Deliverable:

✓ *Comprehensive Preliminary Assessment of All Sites*

Joint Task: CCH, HTC, HRI and Crossroads Team

Visitor Center Location and Development

Deliverable:

- ✓ *Preliminary recommendations with pros and cons for each site*
- ✓ *Discussion with Crossroads Team*
- ✓ *Recommendations included in final report*

Determine Market Potential:

- Review existing market research
- Trend report of potential market profiles
- Interview top tour influencers and operators
- Conduct competitive analysis of other Revolutionary War Sites
- Identify best practices in Military Heritage visitor experiences

Deliverable: Competitive Analysis Report

On-Site Assessments:

- Visit 140 sites
- Assess physical condition
- Assess interpretation
- Identify Visitation Potential
- Assess Visitor Readiness

Deliverable:

✓*Building/Structure/Site Report*

Additional Assessment Visitor Readiness:

- Review Net Promoter Score/Trip Advisor Ratings (and comments) for all sites
- Confirm visitor readiness criteria for sites, experiences
- Review site photography and assessment forms for each site
- Filter and map sites according to visitor readiness level
- Visit top 25-30 sites
- Assess surrounding community assets, visitor services as potential contributors to visitor experience
- Create potential itineraries for use in marketing

Deliverables:

✓*Visitor Readiness Assessment Report*

✓*Recommendations for Tiered Development*

Visitor Center Location and Development:

- Inform on current trends in Visitor Centers
- Identify potential locations for main, satellite centers
- Review use of technology (apps or other smart phone access) to help visitors locate sites and programs

Deliverable:

✓ *Location and Development Recommendations*

THANK YOU!

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