CRITICAL SUCCESS FACTORS FOR CULTURAL HERITAGE TOURISM OPERATIONS

by

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(Under the Direction of John C. Waters)

ABSTRACT

Cultural heritage tourism is a complex field involving many factors, including the business of tourism, the needs of the host community, and the management and preservation of heritage assets. This thesis aims to discover what factors play a key role in the success of cultural heritage tourism operations. Through research of literature and case studies, recurring factors taken from success stories and the evaluation of cultural heritage tourism failures has led to the development of a list of eight critical success factors that play a key role in successful cultural heritage tourism operations. Although success is not solely dependent upon these factors, they have been important in the successes of the case studies discussed in this thesis and throughout cases studied in academic literature. Therefore, it is recommended that these factors be considered when developing any cultural heritage tourism operation.

INDEX WORDS: Cultural heritage tourism, Heritage tourism, Cultural tourism, Tourism development, Critical success factors, Strategic planning, Management, Interpretation, Historic preservation

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DEDICATION

        I have a long list of individuals who I have been blessed with to assist me in this giant undertaking who have been unbelievably helpful and understanding throughout this process. First, I want to say thank you to my parents, Pat and Pam McShea, for putting up with me and helping me to achieve goals that I never thought were possible. To Nana and Diddley, thank you for listening to me whine about writing my thesis and always being supportive and encouraging; to Grandfather Bob and Grandmother Doris for sending me some cash to help me eat while in school and for also offering words of encouragement; to my friends and colleagues whom have endured my hours of venting over the phone (especially Ashton Mullins, Ashley Cissel, and Sarah Smith); to my boyfriend, Todd Withrow, who has been a wonderful distraction and friend throughout this process; to Donna Gabriel for acting as my stand-in mother away from home, to my professors John Waters, Wayde Brown, Pratt Cassidy, Mark Reinberger, James Reap; to my Reading Committee members, Leigh Askew Elkins and Brian La Haie; and to Devon Harris, Director of Public and Visitor Relations of the South Carolina National Heritage Corridor, for helping me with my research.

I can do all things through Christ who strengthens me.

-Philippians 4:13

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CHAPTER I

INTRODUCTION

Purpose of Thesis

The purpose of this thesis is to examine all of the critical success factors that must

be present in heritage sites, communities, regions, and national heritage tourism endeavors

in order to achieve successful cultural heritage tourist operations. I chose this topic

because in recent years I have developed an interest in tourism to places that have a strong

"sense of place" and have kept their historic, cultural, or ecological integrity. Through

experiences such as working on Hilton Head Island, South Carolina in the hospitality and

marketing businesses and my internship with Fanning Institute at the University of

Georgia, I have witnessed firsthand the benefits and challenges in developing cultural

heritage tourism. Through researching the topic of cultural heritage tourism, I have

discovered that a recurring pattern of critical factors is present in successful cultural

heritage tourism operations. This research has aided in the development of a list of critical

success factors of cultural heritage tourism that aims to serve as a reference for

communities, cities, regions, and states that are attempting to develop cultural heritage

tourism.

Methodology

Through researching literature and cultural heritage tourism case studies, this

thesis will examine the characteristics of successful cultural heritage tourism operations to

determine the critical success factors. Based on published literature by tourism, sustainability, marketing, and business professionals, personal interviews, marketing studies, and the analysis of cultural heritage tourism case studies encompassing a broad range of cultural heritage tourism operations, a list of critical success factors will be determined based on the recurring presence of these factors in successful tourism operations. Conclusions about which factors are critical in the success of cultural heritage tourism operations will be based upon the findings of the case studies and research. The applicability of these factors to any scale of heritage tourism operation (local, regional, statewide, or national) will be examined. Also, an executive summary of the eight critical success factors with recommendations for communities will be included at the end of this thesis.

<div style="text-align:center">**CHAPTER II**</div>

<div style="text-align:center">**WHAT IS CULTURAL HERITAGE TOURISM?**</div>

Cultural Heritage Tourism Defined

People have been traveling for cultural tourism reasons since the age of the Romans, visiting historic sites, monuments, landmarks, attending special events and festivals, and visiting museums. All these activities are part of the total tourism experience.[1] In recent years, growing international interest in heritage has caused a growth in cultural heritage tourism as well. For the purposes of this thesis, cultural heritage tourism can be defined as "travel concerned with experiencing the visual and performing arts, heritage buildings, areas, landscapes, and special lifestyles, values, traditions, and events."[2]   This includes also "handicrafts, language, gastronomy, art and music, architecture, sense of place, historic sites, festivals and events, heritage resources, the nature of the work environment and technology, religion, education, and dress."[3]   The American Chapter of The International Council on Monuments and Sites (ICOMOS) says, "Cultural tourism as a name means many things to many people and herein lies its strength and its weaknesses." The World Tourism Organization (WTO) defines cultural heritage tourism as "movements of persons essentially for cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other events, visits to sites and monuments, travel to study nature,

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[1] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, (New York: Haworth Press, Inc., 2002), 3-5.
[2] Walter Jamieson, "Cultural Heritage Tourism Planning and Development: Defining the Field and its Challenges," *APT Bulletin, Vol. 29*, No. 3-4. Thirtieth Anniversary Issue (1998): 65-67.
[3] *Ibid.*

folklore or art, and pilgrimages."[4]   There is no one definition for cultural heritage tourism, as it is a broad concept that covers a variety of tourism activity.

There are also sub-categories beneath cultural heritage tourism, such as thanatourism, or "dark tourism," which involves tourism "motivated by a desire to visit places of death, atrocity, disaster, and other forms of human suffering."[5] This form of cultural heritage tourism includes visiting sites of battlefields, Ground Zero in New York City after September 11, 2001, or even Southeast Asia following the 2004 tsunami crisis. New Orleans is currently benefiting from thanatourism after Hurricane Katrina. One study done by Devon Robbie from the Department of Anthropology at Tulane University stated that, " …in many ways it is the human costs of such events, rather than the purely physical aspects of destruction, that make them fascinating to the public."[6] Whether or not it is ethical to benefit from human crisis by exploiting people and/or sites is questionable, but it is a form of cultural heritage tourism worth noting.

Bob McKercher and Hilary du Cros examine cultural heritage tourism and its underlying principles, as shown on the following page in Figure 1.

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[4] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, WTO 1985:6, (New York: Haworth Press, Inc., 2002), 3-5.
[5] Robbie, Devon. "Touring Katrina: Authentic Identities and Disaster Tourism in New Orleans." *Journal of Heritage Tourism,* Vol. 3, No. 4., 2008.
[6] *Ibid.*

Issue	Principle
The nature of tourism	• Tourism is a commercial activity • Tourism involves the consumption of experiences • Tourism is entertainment • Tourism is a demand-driven activity that is difficult to control
Attractions drive tourism	• Not all tourism attractions are equal • Cultural heritage attractions are part of tourism • Not all cultural assets are cultural tourist attractions
Factors influencing visitation levels	• Access and proximity dictate the potential number of visitors • Time availability influences the quality and depth of experience sought
Tourist behavior	• The tourist experience must be controlled to control the actions of the tourist • Tourists want controlled experiences • The more mainstream the market, the greater the need for user-friendly tourism products
Cultural Tourism	• Not all cultural heritage tourists are alike • Cultural heritage tourism products may be challenging and confronting but not intimidating or accusatory • Tourists want "authenticity" but not necessarily reality

Figure 1: Underlying Principles of Cultural Heritage Tourism [7]

History of Cultural Heritage Tourism

Cultural heritage tourism began to be recognized as a specialized product in the

1970s because researchers noticed that some tourists traveled specifically to learn about

and experience a certain culture or heritage. It was a niche market for the educated, more

affluent tourists who were seeking a vacation outside the norm. The growth of cultural

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[7] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, WTO 1985:6, (New York: Haworth Press, Inc., 2002), 3-5.

heritage tourism has been an expression of a more fundamental change in tourists'

preferences for quality and experiential, not passive, activities. Therefore this niche

market must be managed and marketed differently than other forms of tourism.[8] Cultural

tourism really took off in the 1990s, making it a "high-profile, mass-market activity."[9]

Internationally, cultural heritage tourism grew quickly by the 1990s, and 35-70

percent of international travelers were considered to be traveling for cultural heritage

purposes.[10] In recent decades, countries have used cultural heritage tourism as a catalyst

to regenerate rural areas, especially in the United Kingdom, the United States, Australia,

and Ireland.[11]

Elements of Cultural Heritage Tourism

According to McKercher and du Cros, there are four basic elements of cultural

heritage tourism: 1. Tourism; 2. The Use of Heritage Assets; 3. Consumption of Experiences

and Products; and 4. The Tourist.

1. Tourism

Above all else, cultural heritage tourism is a form of tourism, and tourism is a big

business. In 2005, the travel and tourism industry contributed $650 billion to the United

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[8] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage Area." *The Journal of Heritage Tourism*, Vol. 4, No. 3, August 2009, 245-256.
[9] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, (New York: Haworth Press, Inc., 2002), 27
[10] *Ibid*.
[11] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage Area." *The Journal of Heritage Tourism*, Vol. 4, No. 3, August 2009, 245-256.

States economy, and is the third largest retail industry in the United States following automotive dealers and food stores. Travel and tourism also directly employ over 8 million people in the United States and creates a payroll income of $171.4 billion, adding $104.9 billion in tax revenues for federal, state, and local governments.[12]

The decision to embark on cultural heritage tourism in any place must be based on sound commercial tourism reasons first, and upon cultural heritage tourism management reasons second, in order for it to succeed. "The overall purpose of tourism development is to enhance the quality of residents' lives by addressing economic, social, cultural, and other benefits of tourism."[13]

Successful cultural heritage tourism products must be shaped with the cultural tourist in mind. Like all tourism forms, heritage tourism development must be preceded by some kind of market study or business plan that is based upon sound commercial tourism reasoning. Before you can develop heritage tourism on a local, statewide, or national scale, you must first understand the type of tourists you are attracting or plan to attract.

2. The Use of Heritage Assets

Tourists are motivated by the experiences and knowledge gained from visiting cultural heritage assets. ICOMOS defines "cultural heritage assets" as "tangible assets such as the natural and cultural environments encompassing landscapes, historic places, sites, and built environments; also intangible assets such as collections, past and continuing

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[12] "Cultural Heritage Tourism 2008 Fact Sheet." The National Trust for Historic Preservation. March 2008.
http://culturalheritagetourism.org/documents/2010CHTFactSheet_000.pdf
[13] Harrill, Rich and Thomas D. Potts. "Enhancing Communities for Sustainability: A Travel Ecology Approach." Department of Parks, Recreation and Tourism Management, Clemson University. *Tourism Analysis*, Vol. 3, 133-142. 1998.

cultural practices, knowledge, and living experiences (ICOMOS, 1999).[14] Cultural heritage

assets must be managed by cultural heritage management but based upon the sound

reasoning of commercial tourism.

3. Consumption of Experiences or Products

Tourists should utilize cultural heritage assets only after they are turned into a

tourism experience or product. All forms of tourism involve the consumption of

experiences and products and cultural heritage tourism is no different. Cultural heritage

assets must be transformed into cultural tourism products, something the cultural tourist

can utilize.[15] Tourism products are generally categorized into sightseeing tourism

products, leisure tourism products, and commercial tourism products.[16] The challenge

comes when attempting to change a heritage asset into a successful tourism product that

tourists can utilize without sacrificing the integrity of that asset.

4. The Cultural Heritage Tourist

What really separates cultural heritage tourists from other tourists is their

motivation for traveling. However, motivation alone does not encapsulate the full

magnitude of cultural heritage tourism. The cultural tourist is most often nonlocal,

traveling for pleasure with limited time and a limited budget, with little or no knowledge of

the significance of the historic or cultural resources being visited. Cultural heritage tourism

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[14] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, (New York: Haworth Press, Inc., 2002), 3-5.
[15] *Ibid.*
[16] Zou, Ying. "A Study on Tourism Development of Small Towns." *International Journal of Business and Management*. April 2006. 63-68.

also seems to be an experiential activity and may include an inspirational aspect for many cultural travelers. More than one-fourth of American adults and one-third of overseas visitors have visited a historic site or museum on their trips. Heritage tourists take longer trips, spend more money, and stay longer than average tourists.[17]

A growing number of visitors are becoming heritage travelers who rank the arts, heritage or other cultural activities as one of the top five reasons for traveling, and these visitors are known as cultural tourists. Since 1998, the Travel Industry Association of America (TIA) and Partners in Tourism have collaborated on research that illuminates the scope of this demographic trend in travel. Nearly 118.1 million American adults say they included at least one of fifteen arts, humanities, historic or heritage activities or events while traveling in 2002. This is more than half of the U.S. adult population (56%). One quarter of these cultural travelers take three or more of these trips per year. In fact, historic and cultural travel volume is up 13 percent from 1996, increasing from 192.4 million person-trips to 216.8 million person-trips in 2002. "Thirty percent or 35.3 million adults say that a specific arts, cultural or heritage event or activity influenced their choice of destination. In fact, many travelers will extend their stay because of an arts, cultural or heritage event or activity."[18]

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[17] "Heritage Tourism and the Federal Government; Federal Heritage Tourism Summit 1." Advisory Council on Historic Preservation Report of Proceedings, Washington, D.C. November 14, 2002.

[18] "Cultural Tourism Resources: Cultural Tourist Profile," The National Assembly of State Arts Agencies, http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.

Changing Trends

Tourists have changed and expect experiences that enrich their lives. From the 1980s to the 1990s, there was a paradigm shift from "escapism" to "enrichment" among American tourists, having major effects on the travel industry as a whole. Figure 2 below shows the huge difference in motivation among American tourists in the 1980s and 1990s.
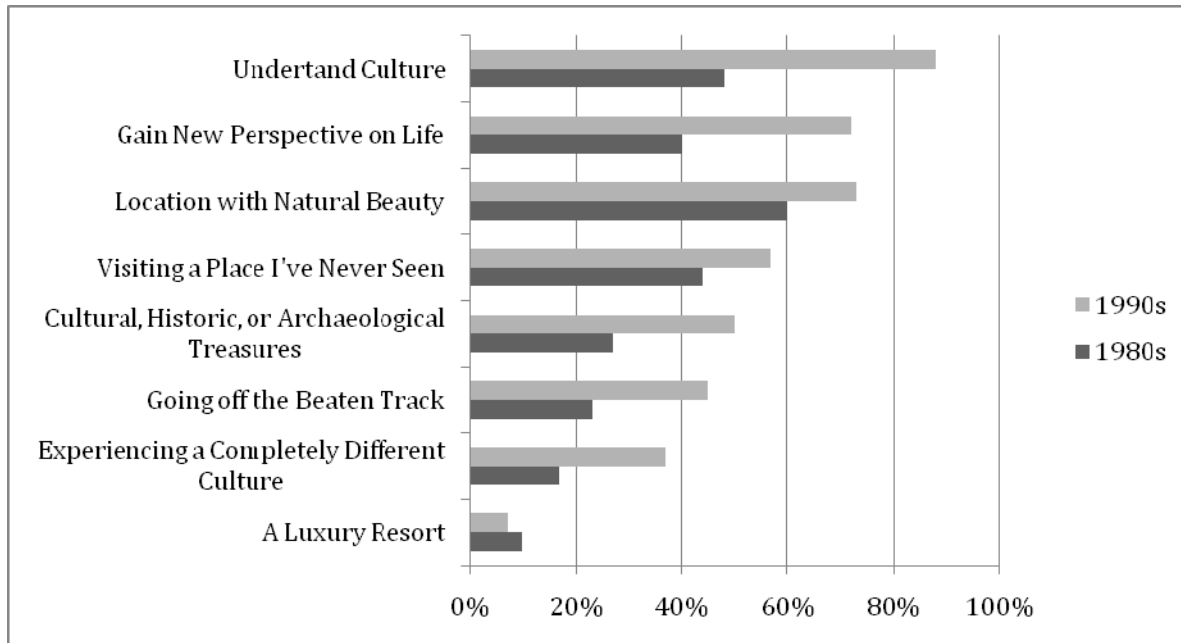
Figure 2: Tourists' Motivation in the 1980s and 1990s[19]

Why has cultural heritage tourism become so popular in recent decades? According to Gail Dexter Lord, President of LORD Cultural Resources Planning and Management, Inc., three factors have contributed to cultural heritage tourism's rise in popularity: 1) rising education levels, 2) an aging population, and 3) the increasing economic role of women.[20]

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[19] Lord, Gail Dexter. "The Power of Cultural Tourism." Wisconsin Heritage Tourism Conference. Lac du Flambeau, Wisconsin. 17 Sept. 1999.
[20] *Ibid*.

Education is the most significant of the three factors that has influenced tourists' participation in heritage and the ability to travel to heritage sites. From the 1980s to 2000, the number of Americans holding college degrees has risen from 15% to 30%.[21]

An aging population has contributed to the increased interest in cultural heritage tourism as well. Visitors' participation in cultural activities increases through middle age and peaks between the ages of 45 and 65. Because of the baby boomer generation, we now have more adults between the ages of 45 and 65 than ever.[22]

Statistics show that women participate in more cultural activities than men. Today, women have a larger economic role than in the past, controlling more of the family's income and in positions of leadership. Women are also more likely to be tour group planners and promoters.[23]

Other trends have emerged in the tourism industry making cultural heritage tourism a popular idea. There has been a dramatic increase in short, get-away trips, especially for those with higher education and income. This group wants more value for the time spent, so quality and convenience are key. Another factor is the "Generation X" tourists, the 40 million Americans born between 1965 and 1977, who make up 40 percent of all cultural heritage tourism. This group is made up of independent, mobile, and highly educated travelers who are looking for authenticity and adventure. People who want to find meaning in life through nature, heritage, and culture are a growing group as well and have contributed to the increased interest in cultural heritage tourism over the years.

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[21] Lord, Gail Dexter. "The Power of Cultural Tourism." Wisconsin Heritage Tourism Conference. Lac du Flambeau, Wisconsin. 17 Sept. 1999.
[22] *Ibid*.
[23] *Ibid.*

Modern theme parks have created higher expectations for cultural tourism. This trend has caused tourists to expect and demand a high-quality experience and has led the cultural heritage tourism industry in the direction of commodification (meaning that heritage tourism has become a commodity that can be marketed and sold). In addition, recent trends indicate an increased level of concern for the environment therefore cultural tourists expect the tourism industry to contribute to the sustainability of communities and the natural environment. Finally, the trend that has and will continue to have an increasing impact is the Internet. Between 1998 and 2003, the number of leisure travel bookings increased tenfold. As cultural heritage sites have shown up on the web, tourists have become more interested. Increased awareness of heritage sites through the Internet has caused the cultural heritage tourism industry to grow exponentially in a short amount of time.[24]

Economic Aspects of the Cultural Heritage Tourist

It is important for leaders in a community to understand who the cultural heritage tourists are and why they are coming (or not coming) in order to best maximize the tourism potential. According to the studies listed on the National Assembly of State Arts Agencies' (NASAA) website, cultural heritage tourists compare to average American tourists in the following ways:

- Spend more: $623 per trip vs. $457 per trip
- Are older: 49 vs. 47
- Are more likely to be retired -- 20 percent vs. 16 percent

[24] Lord, Gail Dexter. "The Power of Cultural Tourism." Wisconsin Heritage Tourism Conference. Lac du Flambeau, Wisconsin. 17 Sept. 1999.

- Are more likely to have a graduate degree: 21 percent vs. 19 percent

- Use a hotel, motel or B&B -- 62 percent vs. 55 percent

- Are more likely to spend $1,000+/-: 19 percent vs. 12 percent

- Travel longer: 5.2 nights vs. 3.4 nights

- Travel by air: 19 percent vs. 16 percent[25]

According to the data above, cultural heritage tourists spend more money and stay longer than average American tourists. According to a Virginia study, "historic preservation visitors stay longer, visit twice as many places, and spend, on average, two-and-a-half times more money in Virginia than do other visitors."[26] They are the curious travelers who want to learn something, or experience something new during their stay. They generate millions of dollars each year in travel expenses, including hotel and bed and breakfast costs, dining, and activities. [27]

Expectations Shape Tourist Behavior

The type, quality, and veracity of information that a tourist consumes prior to his arrival will shape his expectations of the asset and his expected behavior while visiting. This is why marketing is so important to reach out to tourists outside of the local area. Different types of tourists will visit a cultural asset for different reasons.[28]

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[25] "Cultural Tourism Resources: Cultural Tourist Profile," The National Assembly of State Arts Agencies, http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.
[26] Brink, Peter H. "Heritage Tourism in the U.S.A.: Grassroots Efforts to Combine Preservation and Tourism." APT Bulletin, Vol. 29, No. ¾, Thirtieth Anniversary Issue (1998), pp. 59-63.
[27] "Cultural Tourism Resources: Cultural Tourist Profile," The National Assembly of State Arts Agencies, http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.
[28] *Ibid.*

Types of Attractions Cultural Heritage Tourists Visit

According to NASAA's Cultural Visitor Profile, cultural heritage tourists visit the following places when they travel: art galleries, theater and museums, historic sites, communities or landmarks, cultural events, festivals and fairs, ethnic communities and neighborhoods, and architectural and archaeological treasures.[29]

The variety of attractions listed above can be an enormous advantage for the community because of the vast opportunity to create partnerships and cross-marketing strategies to build their tourism economies.

Benefits of Cultural Heritage Tourism

There are countless benefits of cultural heritage tourism, but perhaps the biggest benefits are diversification of local economies and the preservation of a community's unique character.[30] NASAA describes cultural heritage tourism as a "creative economy" and lists many of its benefits:

> The benefits of cultural heritage tourism can be far-reaching. For communities, it can strengthen the local economy; promote resource protection; increase visitor expenditures; generate employment; preserve the unique character of a community; increase community pride, and awareness of community resources; increase tax receipts; and stimulate economic growth. It can assist the cultural heritage resources themselves by augmenting revenues in appropriate and sustainable ways; fortifying cultural heritage resources through a stronger base of cooperation; fostering recognition of the economic contribution of the cultural heritage resources on a regional and community level; and strengthening the preservation, protection, and presentation of the resources. Finally, on the state level, cultural heritage tourism encourages the protection and continued use of

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[29] "Cultural Tourism Resources: Cultural Tourist Profile," The National Assembly of State Arts Agencies, http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.
[30] "Cultural Heritage Tourism 2008 Fact Sheet." The National Trust for Historic Preservation. March 2008.
http://culturalheritagetourism.org/documents/2010CHTFactSheet_000.pdf

cultural heritage resources, which is important to the quality of life and economic well being of the state. It strengthens cultural heritage resources, and the tourism industry; it is an integral, complementary element of the recreation and leisure environment of the state; and it stimulates revenues in appropriate and sustainable ways.[31]

In addition, cultural heritage tourism reintroduces people to their cultural roots and sparks interest in one's own history or culture, therefore serving as a powerful force encouraging people to preserve that culture.[32]

Cultural heritage tourism is part of a diversified economy and provides jobs that are directly and indirectly related to tourism.   According to the Travel Industry Association, tourism itself generated 7.2 million in direct-travel generated jobs and 17 million indirect travel-generated jobs in 2002. These jobs were ranked in order of the number of employment: 1) public transportation, 2) auto transportation (includes car dealers, gas stations, car rental and leasing), 3) lodging, 4) food service, 5) entertainment, 6) general retail, and 7) travel planning.[33] These jobs are obviously directly related to tourism, however, there are many more jobs that cultural heritage tourism creates that are not as obvious. These include: interpreters, re-enactors, interpretive planners, museum guides, exhibit designers, museum architects, curators, craftsperson or artist, musicians, actors, arts council staff, preservation staff, architectural historians, recreational outfitters… the list goes on and on. Just by increasing cultural heritage tourism, a

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[31] "Cultural Tourism Resources," The National Assembly of State Arts Agencies, Travel Industry Association of America Travel Scope survey 2003; *The Historic/Cultural Traveler, 2003 Edition,* TIA and Smithsonian Magazine http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.

[32] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage Area." *The Journal of Heritage Tourism,* Vol. 4, No. 3, August 2009, 245-256.

[33] "Cultural Heritage Tourism Creates Jobs." *Share Your Heritage.* National Trust for Historic Preservation. http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2010.

community can really benefit the residents by increasing job opportunities and setting a higher standard of living.[34]

A Study on the Benefits of Heritage Tourism

A study was conducted in the Silos and Smokestacks National Heritage Area (SSNHA) in Iowa in 2008 with the purpose of analyzing the visitor spending and economic impacts of heritage tourists in the SSNHA. Understanding the expenditure patterns of heritage tourists was not only crucial to strategic planning for the area but also helped strengthen its case that it was essential to the economy of the state of Iowa.[35]

The SSNHA is one of twenty-seven congressionally designated National Heritage Areas in the United States and consists of a variety of sites that interpret the stories of agriculture, ranging from dairy farms to museums to vineyards. It takes up a large part of the state of Iowa, consisting of thirty-seven counties and covering over 20,000 square miles. It is also affiliated with the National Park Service.[36]

The study was conducted by surveying a large sample of respondents by surveying them from August 2003 through June 2004. By June 2004, 616 surveys were completed. Visitors provided information regarding to six categories of spending, including lodging, restaurants, groceries, transportation, admissions, and shopping.[37]

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[34] "Cultural Heritage Tourism Creates Jobs." *Share Your Heritage.* National Trust for Historic Preservation. http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2010.
[35] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage Area." *The Journal of Heritage Tourism*, Vol. 4, No. 3, August 2009, 245-256.
[36] *Ibid.*
[37] *Ibid*.

The spending patterns of cultural heritage tourists in the SSNHA were also analyzed

to find the economic impact that heritage tourists have in the SSNHA. Findings concluded

that initial visitor spending was just over $62 million and are identified as total "direct"

economic transactions. The largest amounts were found in the aggregate service sectors

($49.7 million), which was based largely on lodging. The trade services came next ($10.7

million) reflecting a major role of the bars and restaurants of the SSNHA.[38]

There are also indirect impacts of cultural heritage tourists, which are broadly

based. Overall, there were an estimated 222,051 heritage tourists to the SSNHA in 2004.

The largest spending amounts were found in the manufacturing sector ($4.3 million),

finance, insurance, and real estate group ($3.4 million), and the services group ($3.2

million). Overall there were $41.7 million of gross sales transactions that were directly or

indirectly related to the SSNHA heritage visitors in Iowa, implying a gross sales multiplier

of 1.65 (sales total impact/sales direct impact = 41,724,327/25,199,709). This means that

$1.00 of additional heritage tourist spending generates $1.65 of output in the Northeast

Iowa economy. [39]

[38] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic
Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage
Area." *The Journal of Heritage Tourism*, Vol. 4, No. 3, August 2009, 245-256.
[39] *Ibid.*

Economic Impact of Heritage Tourists in the SSNHA

Sales/Output

Industry	Direct	Indirect	Induced	Total	Total Value Added/Income	Total Jobs
Agriculture	0	197,334	87,117	284,452	47,417	2.3
Mining	0	200	203	402	227	0
Utilities	0	354,770	218,255	573,026	298,863	1.4
Construction	0	235,565	60,014	295,580	125,113	3.6
Manufacturing	0	1,748,263	1,261,169	3,009,428	1,262,755	16.4
Transportation & Warehousing	0	428,081	235,021	663,104	365,464	8.8
Retail Trade	4,328,816	261,099	1,119,830	5,709,744	2,724,273	131.8
Information Services	0	534,708	256,956	791,664	417,757	5.9
Finance, Insurance, & Real Estate	56,012	1,373,260	1,269,319	2,698,509	1,800,273	19.7
Professional Services	15	1,175,166	416,032	1,591,216	1,126,858	30.6
Other Services	20,144,444	1,307,599	2,717,197	24,169,243	13,788,092	579.4
Government	670,422	153,756	1,113,699	1,937,878	937,480	2.6
Total	25,199,709	7,769,801	8,754,812	41,724,327	22,894,572	802.5

Figure 3: The annual economic impact of tourists to the SSNHA 2004 ($ sales, $ value added, jobs).[40]

This data helps researchers to see how much cultural heritage tourism really

impacts the economies of the thirty-seven counties located within the SSNHA. A total of

72.2 percent of the total employment (almost 605 jobs created directly related to heritage

tourism and 803 created indirectly related to heritage tourism) of the SSNHA is a result of

tourist spending. The above results show that visitor spending is concentrated in the

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[40] "Cultural Tourism Resources: Cultural Tourist Profile," The National Assembly of State Arts Agencies, http://www.nasaa-arts.org/artworks/ct_contents.shtml. 2010.

services and trade sectors, but is also widely disbursed due to the multiplier affect across all sectors of the economy.[41]

The results of this study also show that visitors to heritage and cultural sites spend significantly more on shopping and lodging than the average tourists. Their total spending was highest among heritage tourists who visited farms, museums, parks, and gardens. This type of research is important to communities and regions that want to gain insight into how much impact heritage tourists really have economically. Cultural heritage tourism can potentially provide major economic benefits to host communities and great motivation for them to manage and preserve their historic, natural, and cultural assets.[42]

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[41] Cela, Ariana, Sam Lankford, and Jill Knowles-Lankford. "Visitor Spending and Economic Impacts of Heritage Tourism: a Case Study of the Silos and Smokestacks National Heritage Area." *The Journal of Heritage Tourism*, Vol. 4, No. 3, August 2009, 245-256.
[42] *Ibid*.

CHAPTER III

ISSUES AND CHALLENGES OF CULTURAL HERITAGE TOURISM

General Issues

Competition in tourism is increasingly difficult, but this competition is not currently between companies or cities, but between integrated regions. [43] Tourism comes with its own challenges when attempting to attract, manage, and promote visitors and tourism products. However, cultural heritage tourism has all of the same issues and challenges as typical vacation tourism but with added challenges that are unique to that particular site or region. This is due to the fact that cultural heritage tourism involves cultural or historic sites that usually need sustainable funding for preservation and maintenance unlike attractions in the normal tourism industry that can be upgraded or rebuilt without a second thought.

There are serious drawbacks to tourism at cultural heritage sites. For example, improper treatment of the cultural and/or historic resources, including overuse (tourism can be too much of a good thing if not managed properly) can lead to the destruction of the resource and threaten the economic well-being of that particular place. Also, too many tourists can lead to problems such as demands on the infrastructure—on roads, airports, water supplies and public services like police and fire protection. Tourism can also add traffic congestion, trash, and inflated real estate prices that make it no longer desirable to

[43] Zou, Ying. "A Study on Tourism Development of Small Towns." *International Journal of Business and Management.* April 2006. 63-68.

live there. Unrealistic expectations of the tourism potential due to lack of reasonable

tourism planning can lead to the deterioration of the local economy.

Over-commodification of resources can lead to the loss of authenticity, which may

decrease tourism demand in the future. Also, changes in social values and a deterioration

of the cultural fabric can have very detrimental effects of cultural heritage tourism if not

handled properly.[44]

Issues Addressed Through Planning

Many of these issues and challenges can be addressed during the planning phase of

developing a cultural heritage tourism operation. Involving the public should be a main

focus. Planning must revolve around the community and local resident first before it can

cater to the visitor. If not, people will not support tourism efforts or even worse, decide to

move. In "A Study of Tourism Development of Small Towns," author Ying Zou describes the

importance of having community participation and management throughout the process of

developing tourism. "Their ideas and promotions should be weighed and adopted so their

enthusiasm will be mobilized, and they will support the construction."[45] Zou also states

that educating the public about tourism and heritage assets is crucial to successful tourism:

"Reinforcement of education with respect to knowledge of tourism will promote the

community residents' tourism consciousness and environmental conception, so they will

take part in the construction and development..."[46] Though Zou is talking about small town

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[44] Jamieson, Walter. "Cultural Heritage Tourism Planning and Development: Defining the Field and its Challenges." APT Bulletin. Vol. 29, No. 3. (1998) pp. 65-67.
[45] Zou, Ying. "A Study of Tourism Development of Small Towns." *International Journal of Business and Management*. April 2006. 63-68.
[46] *Ibid.*

tourism development, this idea should be applied to all levels of tourism development, including local, regional, and national.

Maintaining the authenticity of resources and tourism products should also be an ongoing strategy in any cultural heritage tourism operation. Planning for the site's capacity and deciding on its physical, natural, social, and cultural limits beforehand will prevent the development of issues later on. The scale and pace of development should also be compatible with the local or regional limits. Essentially, there must be a balance between the irreplaceable resources and the needs of the tourists, residents, economic, and social development.[47]

Issues can also be resolved during the planning phase by developing guidelines for the tourism operations, such as codes of practice, indicators to measure the impact and success of tourism ventures, and strategies for the protection of the natural, cultural, and historic resources that will be promoted.[48]

Hong Kong Study on Cultural Tourism Failures

A study was conducted in Hong Kong in 2004 to analyze the factors associated with cultural heritage tourism failures. Ho and McKercher (2004) describe four key factors associated with unsuccessful cultural heritage tourism ventures. These include 1) heritage managers having a lack of understanding of market expectations related to the experiences of heritage sites, 2) a lack of assessment of the tourism potential of a site in terms of its attractiveness to tourists and its carrying capacity, 3) lack of site management strategies

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[47] Jamieson, Walter. "Cultural Heritage Tourism Planning and Development: Defining the Field and its Challenges." *APT Bulletin*. Vol. 29, No. 3. (1998) pp. 65-67.
[48] *Ibid.*

and 4) no connection between the management of the site as a cultural heritage asset and development and promotion of tourism products.[49] These factors indicate a general lack of knowledge and skill involving tourism product management and development, as well as a lack of understanding of the market and how to go about marketing heritage tourism products.

Failure to Adopt a Marketing Approach

Failure to adopt a marketing approach in a cultural heritage tourism endeavor can lead to many problems. These issues include a loss of control over the tourism product, leaving those managing the product in a reactive position, and having to respond to the consumer and travel trade demand rather than leading it. Too often managers of heritage tourism operations become overly obsessed with increasing the number of tourists rather than focusing on increasing the quality of the tourist's experience. When this happens, the large number of people visiting a site can actually damage it and decrease its quality, resulting in fewer tourists in the future and possibly compromising the site's historical or cultural value.[50]

Research on the Sustainability of Cultural Heritage Tourism Lacking

Perhaps one of the biggest challenges of cultural heritage tourism is that is has received surprisingly little scholarly attention in regards to its close relationship to

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[49] Hughes, Michael and Jack Carlsen. "The business of Cultural Heritage Tourism: Critical Success Factors." *Journal of Heritage Tourism*. Vol. 5, No. 1, February 2010, pp. 17-32.
[50] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, WTO 1985:6, (New York: Haworth Press, Inc., 2002), Chapter 13.

sustainability. Instead, the academic literature has focused on the cultural, educational, and practical preservation aspects of cultural heritage tourism, leaving gaps in research on the sustainable and economic benefits of cultural heritage tourism.[51] Yet, cultural heritage tourism represents a large portion in much of the world's developed economies. For example, cultural heritage tourism generates 28 percent of the tourism expenditures annually in the United Kingdom, and has been described as "a major strength of the British market for overseas visitors."[52]

The "Curatorial Approach"

Another challenge that arises often in cultural heritage tourism is that many heritage managers do not even consider themselves to be in the tourism business, but see themselves as curators of historic or cultural sites. This "curatorial approach," as Garrod and Fyall describe, implies "a heritage mission that is primarily one of caring for the property and maintaining it in as pristine a state as possible, with issues such as financial solvency and public access entering into the decision-making process only as secondary considerations."[53] This is particularly true in the museums and galleries group, and often these managers will actually resent tourists visiting. An unfortunate consequence of this "curatorial approach" is a lack of funding for essential maintenance and preservation, especially during difficult financial times when access to traditional public funding has been restricted by government spending cuts. Sites that get hit the hardest as a result of

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[51] Fyall, Alan and Brian Garrod. "Managing Heritage Tourism." Annals of Tourism Research, Vol. 27, No. 3, 682-708, 2000.
[52] *Ibid.*
[53] *Ibid.*

the lack of funding are historic buildings, which are especially prone to both natural deterioration and a range of negative tourist impacts.[54]

Conclusions on Challenges and Issues

Cultural heritage tourism faces many challenges and issues, even more than other forms of tourism. This is mainly due to the unique challenges that involve historic and cultural sites, often leading to a lack of adequate funding to manage and preserve them. Lack of planning for tourism is a major issue but a simple one to fix in many cases. Managers are also a problem in the development of cultural heritage tourism because they take on a "curatorial" attitude when managing a heritage attraction that often leads them to ignore the business side of heritage site management.

In the following chapter, cultural heritage tourism case studies will be examined revealing the critical success factors that must exist for successful tourism operations. Many of these factors will be determined based on how the individuals, organizations, businesses, and other stakeholders come together to resolve the challenges mentioned in this chapter.

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[54] Fyall, Alan and Brian Garrod. "Managing Heritage Tourism." Annals of Tourism Research, Vol. 27, No. 3, 682-708, 2000.

CHAPTER IV

CASE STUDIES

Introduction

This chapter includes two case studies that exemplify successful cultural heritage tourism operations. Each case study was analyzed in order to discover whether certain factors contributed to the success of the heritage tourism operations. If a recurring pattern of critical factors is present in both case studies, which involve very different cultural heritage tourism efforts, this pattern may suggest that certain critical success factors might contribute to the success of many cultural heritage tourism operations. Also, these case studies may help to suggest that these critical success factors may be applicable to all levels of cultural heritage tourism, whether it is local, regional, statewide, or national.

The first case study, the South Carolina National Heritage Corridor, was included in this thesis because this heritage tourism effort includes a broad range of heritage assets that exist in a large region of South Carolina and represents a variety of tourism efforts. Also, this case study exemplifies the need for creating partnerships, strategic planning, and marketing efforts in order to achieve success. This particular case was also chosen because of its potential applicability to cultural heritage tourism efforts on any scale, whether it is local, statewide, or national.

The second case study discussed in this chapter, "Market-Based Product Development in Heritage Tourism," is smaller in scale than the first and focuses on

marketing research, marketing, product development, interpretation, and management of

heritage sites. This case was chosen because it provides an analysis of a heritage tourism

effort that focuses on specific heritage sites. Like the first case study, this study was chosen

in order to examine its potential applicability to cultural heritage tourism efforts of any

scale, whether it is a local, statewide, regional, or national effort.

Case Study 1: The South Carolina National Heritage Corridor

This case study of the South Carolina National Heritage Corridor (SCNHC) illustrates

a successful cultural heritage tourism development effort at a regional scale. This case

study also demonstrates how cultural heritage tourism operations must have certain

critical factors present in their development, implementation, and evaluation phases in

order to be considered sustainable and successful in increasing tourism and economic

development in a community, region, or state. This case study and Case Study 2 will be

evaluated for the critical factors that made it a success. These factors will be discussed at

the end of this chapter.

The data for this case study was obtained by use of the Corridor's website, through

personal interviews with SCNHC staff members, and researching the initial SCHNC

marketing research report and the Heritage Corridor Plan.

Description

Beginning in the 1990s, a number of initiatives at the local, regional, and statewide

levels demonstrated that South Carolina's heritage resources could be used as a tool for

rural economic development and community revitalization through cultural heritage

tourism. The Heritage Corridor Plan was developed in 1996 by a variety of stakeholders in

South Carolina who wanted to use the state's rich heritage to improve the economic situations in many of South Carolina's rural areas.[55]

The United States Congress designated the South Carolina National Heritage Corridor as a National Heritage Area in 1996 and then as a National Heritage Corridor in May 1997.[56] South Carolina was first among the Southeastern states to receive National Heritage Area designation and this area was the largest one in the United States at the time of its designation. A National Heritage Area is defined as a "region recognized by Congress for its unique qualities and natural, cultural, historic, and recreation resources that combine to shape a cohesive, nationally distinctive landscape."[57] The SCNHC is a member of the Alliance of National Heritage Areas, a membership organization of the forty National Heritage Areas, partners, organizations, and individuals who support and participate in heritage development initiatives.[58]

The corridor stretches over 240 miles from the mountains of Oconee County, along the Savannah River, to the port city of Charleston, and contains seventeen counties: Abbeville, Aiken, Anderson, Bamberg, Barnwell, Berkeley, Charleston, Colleton, Dorchester, Edgefield, Georgetown, Greenwood, McCormick, Oconee, Orangeburg, Pickens and Saluda, each with its own unique natural and heritage resources.

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[55] "Heritage Tourism, South Carolina National Heritage Corridor, Corridor Discovery System." *Best Practices in National Heritage Areas*. Fall, 2005.
[56] South Carolina National Heritage Corridor, http://www.sc-heritagecorridor.org/about_us/. Accessed February 15, 2010
[57] "National Heritage Area Information." http://www.sc-heritagecorridor.org/about_us/national_heritage_area_information/. Copyright 2008, South Carolina National Heritage Corridor. Accessed 26 May, 2010.
[58] *Ibid.*

The official Heritage Corridor Plan describes the Corridor as follows:

The 17 counties of the Heritage Corridor offer a cross-section of the state's historical, cultural, and natural resources that tell the vibrant story of South Carolina's centuries-long evolution and culture. The area describes the progression of upcountry and low country life, from grand plantations and simple farms to mill villages and urban centers, and how their history affected South Carolina as a state and America as a nation.[59]

The variety of resources found in the seventeen counties provides greater opportunity for a tourism market when combined than individually and offers the traveler a way to easily visit sites in South Carolina that encompass the many different heritage resources available in the state.

The SCNHC is divided into four regions from west to east: Mountain Lakes (Region I), Freshwater Coast (Region II), Rivers, Rails and Crossroads (Region III), and Lowcountry (Region IV). There are two tourist routes within the Corridor, the Nature Route, which explores the Corridor's natural environments and recreational resources, and the Discovery Route, which promotes the region's history.[60]

The map on the following page illustrates the four regions of the Corridor.

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[59] South Carolina National Heritage Corridor, http://www.sc-heritagecorridor.org/about_us/. Accessed February 15, 2010
[60] *Ibid.*

Figure 4: SCNHC Map[61]

Region 1: Anderson, Oconee, and Pickens Counties

      This region encompasses many scenic and historic heritage assets, including rock

outcrops, a waterfall, hiking trails, and State Parks. This region represents the Corridor's

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[61] "Life in the Carolinas, Heritage Trails."
http://www.carolinaliving.com/images/sub/heritagemapbig.jpg&imgrefurl=http://www.carolinaliving.com/life/heritagetrails.asp&usg=__M_T63OOYs7r9qPEnX8pLpFijYeU=&h=308&w=400&sz=50&hl=en&start=4&sig2=gjVrFjZfrK-uzn0fg_2Zlw&um=1&itbs=1&tbnid=dOwtGLQOL0_DtM:&tbnh=95&tbnw=124&prev=/images%3Fq%3Dmap%2Bof%2Bsouth%2Bcarolina%2Bheritage%2Bcorridor%26um%3D1%26hl%3Den%26safe%3Doff%26client%3Dsafari%26rls%3Den%26tbs%3Disch:1&ei=D5b-S9TGF4Kclge1sbDvCQ. Copyright 2010, Center for Carolina Living. Accessed 26 May 2010.

rural mountain area and possesses an array of historic buildings such as mill complexes complete with factories, housing, and company stores.[62]

Region 2: Abbeville, Greenwood, McKormick, and Edgefield Counties

Region 2 is known for a history of influencing the state's politics. With courthouse towns and historic Revolutionary War outposts, this region is rich with political heritage. Edgefield County has been the home of ten South Carolina Governors, including former Governor and Senator Strom Thurmond. There is also a stretch of land known as "The Ridge," which contains particularly fertile land where cotton and other crops have flourished historically. Folk art and cultural traditions are prevalent here as well.[63]

Region 3: Aiken, Barnwell, Bamberg, and Orangeburg Counties

Strongly influenced by the South Carolina Railroad, which was the nation's first railroad, numerous towns sprang up along the route from Charleston to Hamburg.   Many of these locations were also clearly planned industrial communities where techniques from the northern Industrial Revolution were adopted in the South. Other resources include the Savannah River Site, a nuclear weapons plant appropriated by the Federal Government in the 1950s; the Santee Indian Reservation with a century-old Indian school; and the Indian Mound at Santee State Park.[64]

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[62] "Heritage Corridor Plan." South Carolina Department of Parks, Recreation, and Tourism. February 1996.
[63] *Ibid.*
[64] *Ibid.*

Region 4: Colleton, Dorchester, and Charleston Counties

Strongly influenced by the historic port of Charleston, this region has a variety of

heritage assets ranging from natural resources and ecotourism opportunities to a number

of historic buildings. Beaches, historic plantations, sweet grass basket makers, and many

other heritage resources can be found in this region of the Corridor.[65]

Steps of Developing the SCNHC

Developing the Corridor did not come without its challenges. The first step in each

of the four regions was to assess the potential tourism resources through engaging local

residents. Historic, cultural, and scenic resources had to be identified. The second step

was to acquire funding for the regional Discovery Center and the Discovery Stations within

the regions of the Corridor. The third step was the actual design and installation of the

interpretive exhibits at various locations. The steps of developing the Corridor went in

sequence, starting with Region 1.[66]

Key Partnerships of the SCNHC

Creating and maintaining partnerships has contributed greatly to the Corridor's

success. The key partners of the SCNHC include the National Park Service (NPS), the South

Carolina Department of Parks, Recreation, and Tourism (SCPRT), the South Carolina

Department of Transportation (SCDOT), the South Carolina Department of Commerce

(SCDOC), the South Carolina State Museum (SCSM), the South Carolina Arts Commission,

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[65] "Heritage Corridor Plan." South Carolina Department of Parks, Recreation, and Tourism. February 1996.

[66] "Heritage Tourism, South Carolina National Heritage Corridor, Corridor Discovery System." *Best Practices in National Heritage Areas*. Fall, 2005.

the South Carolina Department of Agriculture, the Farm Bureau, the South Carolina

Humanities Council, the county and city governments of the Corridor's 14 counties,

Clemson University Edisto Research and Education Center, the Agricultural Heritage Center

Board, Edgefield County Historical Society, the Heritage Corridor Farmers Association

(HCFA), and Heritage Corridor Garden Destinations.[67]

The following SCNHC partners contributed to the success of the SCNHC in different

ways:

The National Park Service (NPS)

After designation by Congress, the National Park Service enters into a cooperative

agreement with the heritage corridor and with local stakeholders. The agreement serves

as the legal vehicle through which Federal funding can be given to non-governmental

management entities within the Corridor.   The NPS provides expertise in the areas of

historic preservation, interpretation, and natural resource conservation.[68]

Because the NPS serves in a mere advisory nature, it does not make any decisions

about the Corridor. This duty is left to the local stakeholders. The Heritage Areas allow the

NPS to fulfill its missions of preserving the nation's heritage without having to acquire and

manage additional land.[69]

The South Carolina Department of Parks, Recreation, and Tourism (SCPRT)

The SCPRT has been involved with the South Carolina National Heritage Corridor

since its creation in 1996. The SCPRT and the SCNHC share the mission to stimulate

economic development throughout the state through tourism development. The SCPRT

aids the Corridor through the Heritage Tourism Program of the Community Economic

Development Division.

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[67] "Key Partnerships." http://www.sc-heritagecorridor.org/about_us/key_partnerships/.
Copyright 2008 South Carolina National Heritage Corridor. Accessed 26 May, 2010.
[68] *Ibid.*
[69] *Ibid.*

Other ways the SCPRT aids the SCNHC are through the contribution of funding for SCNHC Discovery Centers, serving as a fiscal agent, and acting as an administrator by supporting the Corridor in areas of human resources, finance, and information technology services. The SCPRT also provides product development and interpretative support to the Discovery Centers and to individual exhibits.   It also provides assistance in exhibit design, contract management, partnership development, marketing, funding strategies, and management.[70]

The South Carolina Department of Transportation (SCDOT)

The SCDOT Director serves on the SCNHC Board of Directors and has partnered with the SCNHC in the development and implementation of the Interpretative Signage Plan.[71]

The South Carolina Department of Commerce (SCDOC)

The SCDOC is also represented on the SCNHC Board of Directors. Its Community and Rural Development Division shares the SCNHC mission in the development of South Carolina's rural areas through the funding of tourism projects using existing resources.[72]

The South Carolina State Museum

The South Carolina State Museum offers assistance with interpretation and development at Heritage Corridor locations.[73]

The South Carolina Arts Commission

The South Carolina Arts Commission is currently partnering with the SCNHC on the development of the new Traditional and Fine Arts Trail and in the hiring of a researcher for the African American Heritage Trail.[74]

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[70] Key Partnerships." http://www.sc-heritagecorridor.org/about_us/key_partnerships/. Copyright 2008 South Carolina National Heritage Corridor. Accessed 26 May, 2010.
[71] *Ibid.*
[72] *Ibid.*
[73] *Ibid.*
[74] *Ibid.*

The South Carolina Department of Agriculture (SCDOA)

The SCDOA has worked with the SCNHC in the development of the Agricultural Tourism Trail and in forming the Heritage Corridor Farmers Association. The SCDOA also serves as an advisor as a HCFA member.[75]

The Farm Bureau

The Farm Bureau has also worked with the Corridor in the development of the Agricultural Tourism Trail and in forming the Heritage Corridor Farmers Association. It also serves as an advisor as a HCFA member.[76]

The South Carolina Humanities Council

The South Carolina Humanities Council works with the SCNHC to fund the preservation and documentation of quality heritage tourism resources within the Corridor. The Director serves as a technical review committee member for the SCNHC grants program.[77]

County and City Governments

The county and city governments of the seventeen counties within the Corridor serve as partners with the SCNHC. They offer funding, restoration of facilities, donation of space, building preparations, and volunteer service on local boards within the Corridor.[78]

Clemson University Edisto Research and Education Center

This SCNHC partner has advanced the Region III Discovery Center project by providing support for the facility.[79]

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[75] "Key Partnerships." http://www.sc-heritagecorridor.org/about_us/key_partnerships/. Copyright 2008 South Carolina National Heritage Corridor. Accessed 26 May, 2010.
[76] *Ibid.*
[77] *Ibid.*
[78] *Ibid*
[79] *Ibid.*

The Agricultural Heritage Center

   The Agricultural Heritage Center works closely with the SCNHC to secure the facility and assist with the planning of future partnership endeavors.[80]

Edgefield County Historical Society

   This partner has hosted and provided support for the Region II Discovery Center facility.[81]

Heritage Corridor Farmers Association

   This partner works with the SCNHC in cross-promotion, marketing, special events, and special programming.[82]

Heritage Corridor Garden Destinations

   The Garden Association also works with the SCNHC cross-promotion, marketing, special events, and special programming.[83]

Supporting Staff of the SCNHC

   The SCNHC has a small number of staff members for the amount of work it accomplishes within the Corridor and throughout the state. Staff members' offices are located at different locations within and outside the Corridor. The SCNHC staff is made up of the following eleven full-time positions:

   President
   Director of Interpretation and Training
   Director of Development
   Director of Public and Visitor Relations
   Group Tour Manager

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[80] "Key Partnerships." http://www.sc-heritagecorridor.org/about_us/key_partnerships/. Copyright 2008 South Carolina National Heritage Corridor. Accessed 26 May, 2010.
[81] *Ibid.*
[82] *Ibid.*
[83] *Ibid.*

Graphics Design Manager
Tourism Supervisor
Tourism Coordinators (4)[84]

Because of the limited number of staff members, the SCNHC depends greatly on

local resources for volunteer service and the management of SCNHC initiatives at the local

level.

The SCNHC Marketing Research

Before creation of the heritage corridor, Newnan, Saylor, & Gregory (NS&G), a

Columbia, South Carolina-based marketing communications agency conducted extensive

marketing research in 2001 to develop a comprehensive marketing and public relations

plan for the corridor. NS&G partnered with MarketSearch, a Columbia-based independent

marketing research firm to conduct a series of studies, including: an analysis of all

available secondary research and a study of the visitors to the SCNHC. NS&G also collected

information on many of the SCNHC stakeholders as well as studying the competition for

marketing efforts. Researchers wanted to know who was coming to these places in order to

develop a marketing strategy for the Corridor.

Research Findings

On-site and telephone interviews provided answers to many research questions,

such as where the visitors were traveling from, how they got there, average age, income

and education levels. Attitudes and opinions of 801 visitors to the Heritage Corridor were

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[84] "Staff Information." http://www.sc-heritagecorridor.org/about_us/staff_information/
Copyright 2008, South Carolina National Heritage Corridor. Accessed 26 May 2010.

gathered during telephone interviews, and the following findings give a "snapshot" of visitors to the SCNHC:

- Between 40% and 50% of the visitors are from South Carolina; other visitors come largely from Georgia, North Carolina, and Florida.
- The typical visitor is married, middle-aged, and traveling by car and with his or her spouse or family, as well as having an above average education level and an above average household income.
- 36% of visitors represent "Natural Families," which refers to married, two-parent families with children at home.
- 20% of visitors represent "Classic Relaxers," which refers to single professionals.
- 14% of visitors represent "Active Families," which refers to family-focused, married, and with children at home.
- 13% of visitors represent "Sightseers," which refers to empty nesters or retirees with no children at home.
- While in the SCNHC, visitors are most likely to visit parks, scenic areas, or take scenic drives. [85]

Evaluating the Competition

Researchers also investigated other heritage tourism competitors within a 360-mile radius to find out what worked for them. These areas included three heritage areas in Georgia, Virginia, East Tennessee, and North Carolina as well as all other tourism areas in South Carolina. Special attention was given to the Shenandoah Valley region in Virginia, the Smoky Mountains, the Outer Banks, North Carolina, and the Blue Ridge Parkway and Asheville area. Researchers also studied tourism efforts in the low country in tourism

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[85] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.

hotspots such as Hilton Head Island, Savannah, Amelia Island, and the barrier islands of Georgia.[86]

NS&G Recommendations

NS&G recommended that further research be conducted since this research was gathered in just two seasons. Additional research should be conducted at different times during the year to obtain a complete assessment of visitors to the Corridor.[87]

Developing a Branding Concept

Branding is a term that is used often but seldom fully understood. A brand is not a product name, not a logo, but an emotional response evoked by the name, logo, or other physical manifestation.[88]

SCNHC marketing professionals wanted unique branding for the corridor that would be general enough to represent the entire area and all of its resources, while remaining recognizable to the visitors as they passed through the corridor. Marketing planners wanted to show the small-town friendliness, simple pleasures, and intellectual and physical challenges that tourists could experience while visiting the corridor. Planners focused on authentic attractions rather than the man-made attractions to give the corridor's branding a real "American spirit" experience. By researching branding strategies of other heritage areas and through questioning visitors to the Corridor about what it "meant" to visit the

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[86] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[87] *Ibid.*
[88] *Ibid.*

SCNHC, NS&G gathered information on how to go about branding the wide variety of individual themes represented within the SCNHC. Therefore, NS&G recommended that branding should "capture the essence of the experience of a journey" through the Corridor.[89]

Competitors to the SCNHC have catchy taglines that market their branding image to the public. For example, Cumberland Island, Georgia uses the tagline, "Wild Horses Couldn't Drag You Away…" referring to the many wild horses that roam the island. Pigeon Forge, Tennessee markets itself as "Your All-American Get-Away," and Gatlinburg, Tennessee markets itself as "The Heart of the Smokies." NS&G recommended in its final report that because of the diverse heritage assets in the SCNHC, it should market itself as a series of journeys that promises the thrill of intellectual exploration and discovery of authentic heritage attractions. Out of three nominated positioning statements, "Discover Real People, Real Places" was the most popular among visitors to the Corridor. This statement should be used wherever and whenever possible in signage, brochures, magazines, and the Internet. Tourists should be able to travel to any destination within the Corridor and recognize a common theme through consistent signage.

Cluster Marketing and Packaging

NS&G recommended that the Corridor should focus packaging efforts on group tours that focus on the in-state audience. NS&G's research indicated that group tours regularly make stops at different locations within the Corridor so specific itineraries should

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[89] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.

be developed and packaged for bus tour groups, church groups, school groups, and niche

market groups. These itineraries should then be promoted to tour operators and group

decision makers around the state.[90]

There is already an opportunity to work with the South Carolina Department of

Parks, Recreation, and Tourism (SCPRT) as it promotes state attractions and heritage sites

to tour group operators through paid advertising in group tour publications. The SCNHC

should take advantage of the many resources that the SCPRT has to offer through

advertising and tie in its advertising efforts with South Carolina State Parks as well. This

should be done so that tourists are guided to the SCNHC website for information.   The

SCPRT already packages individual cities and towns in South Carolina on its website, so

those listed destinations that are included in the SCNHC should be placed on the SCNHC

website.   The SCNHC should also co-op with other individual in-state attractions and

heritage-related areas such as Scenic Byways, Tobacco Trail, Cotton Trail, and the Palmetto

Trail.[91]

Niche markets exist around specific fields of interest and clusters of stops to sites

along the Corridor should be packaged together to appeal to the following target markets:

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[90] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor
Marketing Plan," 1996.
[91] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor
Marketing Plan," 1996.

Niche Market	Cluster Package Examples
Water Recreation	Lake Hartwell and Lake Thurmond
Arts, Antiques, and Museums	Edgefield Pottery, the Jim Garrison Gallery, and the World of Energy
Hiking, Biking, and Watchable Wildlife	State parks and Isaqueena Falls
Scenic Drives	Scenic Byways and Highway 64
Adventure Travel	Rock climbing, whitewater rafting, and biking
Plantations and Historic Architecture	Boone Hall, Hampton Plantation, and Woodburn Plantation
Farms and Ornamental Gardens	Magnolia Plantation Gardens, the Botanical Gardens, and Emerald Farms
Military Sites and Battlefields	Ninety-Six battlefield, Fort Sumter and other sites in Charleston
Mill Villages, Courthouse Towns, and Railroad Towns	Hagood Mills, Barnwell, Pendleton, Graniteville, and Edgefield
African American Heritage	Region 4

Figure 5: Niche Markets and Cluster Packaging:[92]

Just as the variety of heritage attractions within the SCNHC allow for marketing

them in cluster packages, the tourists can also be thought of as clusters or groups. This

approach to marketing can also result in effective and efficient communications and the

promotion of the Corridor. These groups already exist and are already organized, allowing

them to be relatively easy to target. Many of these groups also already have their own

communication tools, such as newsletters and bulletins that the SCNHC can easily tap into.

These groups are often looking for interesting things to do with their members as well.[93]

Examples of cluster groups that NS&G recommend the SCNHC to target include:

- Seniors
- Birdwatchers
- Historical societies

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[92] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[93] *Ibid.*

- Boy Scouts/Girl Scouts
- Future Farmers of America (FFA)
- Sierra and Audubon clubs
- Group tour operators
- Arts and Crafts organizations
- Hunting clubs
- Church groups[94]

NS&G saw great potential in cross marketing and packaging the SCNHC with other nationally designated heritage areas in the Southeastern United States and with in-state events and festivals, especially those taking place in Charleston, South Carolina (Region 4) and the mountains region (Region 1).[95]

Advertising Strategy

Tactics for advertising the SCNHC should focus on cluster marketing with group tours. For example, hunting and fishing opportunities in the Corridor can be promoted in targeted outdoor publications. Package get-away vacations for weekend excursions should be developed so that each package offers something different, tailored to a specific location (like staying in a bed & breakfast, dining at a local restaurant, and taking a boat tour in one location). Efforts should be made to advertise through travel publications, e-marketing, and through enhancing the SCNHC website.

Cross marketing is also a tool that the SCNHC can use to promote itself. The SCNHC can co-op with other heritage tourism products in the state and surrounding states, such as the Civil War sites in the SCNHC mentioned in publications in the Shenandoah Valley Battlefields National Heritage Area. This type of marketing is designed to have a long-term

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[94] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[95] *Ibid.*

effect as visitors to the Shenandoah Valley may consider also visiting the SCNHC

battlefields in the future. Such marketing efforts would obviously be reciprocal, as the

SCNHC would promote other areas as well.[96]

Establishing Partnerships and Networking

NS&G suggested in its final report that the SCNHC regional coordinators should

engage in regular interaction between regional boards, regional committees, and the

businesses and organizations within the Corridor.   Regular meetings between stakeholders

will open lines of communication with local businesses, attractions, and communities along

the Corridor. All parties will become familiar with educational and promotional materials

associated with the Corridor and assist in the distribution of such material.   Regional

coordinators will ensure that all local businesses understand that they are part of the

SCNHC and should promote themselves accordingly, thus bringing more business for them

and to the Corridor as a whole. For example, "regional coordinators and representatives

will educate retailers about all the unique eateries in the general area so that these same

retailers will suggest these restaurants when visitors specifically ask where they can grab a

bite to eat in town."[97] Educating retailers about the sites the Corridor has to offer will

better prepare them when visitors ask about opportunities within the Corridor.[98]

Other recommendations that NS&G gave to the SCNHC board members in its final

report are as follows:

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[96] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor
Marketing Plan," 1996.
[97] *Ibid.*
[98] *Ibid.*

1. *Organize and host a Fifth Anniversary Celebration*: unveil the marketing plan, explain the importance of grassroots connections, educate the stakeholders about training seminars and workshops, and attract more financial support for the Corridor. This kick-off event should also increase public awareness and interest.

2. *Special Events*: planning special events throughout each community of the SCNHC is important to give the public the opportunity to learn about training sessions and unify the Corridor as a whole. Such events may include community workshops, competitions, volunteer recognition receptions, ribbon cuttings, and recognizing heritage sites.

3. *Stimulate Product Development Within the Corridor*: both elected officials and private business need to take part in investing in tourism product development. This can be as simple as cleaning up a heritage site, such as a cemetery, and such drives should be initiated at the local level.

4. *Educate Individuals Within the Corridor*: each of the events previously discussed should be designed so that they educate people. The more educated people involved with the Corridor become, the more pride is instilled in the community and identification with heritage assets increases. Educating local stakeholders through media such as press releases, feature stories, and photographs with captions can increase support and awareness.

5. *Ensure that Hospitality and Tourism Employees Know What the SCNHC Can Offer*: NS&G recognized through its research of the Corridor that there is great inconsistency of knowledge about the Corridor to those who might benefit most from it, such as hospitality and tourism employees. SCNHC representatives should educate this group especially because they are the

individuals that tourists will come in contact with first and from whom they will get their first impression of the Corridor.

6.   *Foster a Strong Volunteer Base*: recruitment should be a main focus of heritage sites. After training volunteers, an effort should also be made to retain them in order to foster a strong volunteer base within the Corridor.[99]

Evaluation

Finally, NS&G recommended in its final marketing plan for the SCNHC to monitor and evaluate its marketing efforts for success, refinement, and enhancement. Ongoing SCNCH research studies were recommended as well in order to provide long-term "tracking data" that will monitor changes in consumer awareness, perceptions, behaviors, profiles, and economic impact over time.[100] NS&G recommended the following data be monitored on a quarterly basis:

- Awareness of the Corridor and specific attractions;
- Awareness, usage, and evaluation of collateral materials, maps, and signage;
- Awareness and recall of specific marketing and campaign messages and/or elements;
- Impact of marketing efforts on visitation plans and/or activities throughout the Corridor;
- Perceptions relative to Corridor features such as local activities, historical sites, food and lodging, recreational opportunities, nature-based opportunities, etc.;
- Visitation dynamics (what visitors do while they are in the area, whether this is their ultimate destination, etc.);

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[99] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[100] *Ibid.*

- General demographic data (age, education, marital status, household income, number traveling in party, etc.) and geographical profiles (home city/state) of visitors;

- Visitor-type profiles (incidence of various SCPRT-defined segments—Natural Families, Sightseers, Active Families, Classic Relaxers, Adult Enthusiasts, and Aggressive Vacationers—so research can be used and compared with ongoing SCPRT research studies); and

- Spending while in the area (spending on lodging, food, transportation, attractions, entertainment, incidentals, retail).[101]

NS&G also recommended that further research studies should be obtained throughout the Corridor on a regular basis through on-site surveys (conducted quarterly at key locations), on-going self-administered surveys (distributed on a "pick-up" basis to visitors at key locations), and by annual economic reviews (reviewing visitor logs, yearly accommodations tax, admissions tax, and other annual state documents to monitor changes over time within the Corridor).[102]

Marketing Research Conclusions

NS&G thoroughly examined the Corridor in terms of its target markets and potential over the period of two years. While NS&G recommends that more research should be conducted at different times of the year to provide more data on the long-term effects of the Heritage Corridor, this research represents a good example of how such marketing research should be conducted prior to developing cultural heritage tourism in any area.

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[101] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[102] *Ibid.*

NS&G's research, along with the implementation of the SCNHC Marketing Plan, holds true to the eight critical success factors of cultural heritage tourism as described in the next chapter of this thesis.

Implementation of the South Carolina Heritage Corridor Plan

The *South Carolina Heritage Corridor Plan* was an undertaking by the South Carolina Department of Parks, Recreation, and Tourism, prepared by the joint venture of Lane, Frenchman, and Associates, Inc. and CityDesign Collaborative, Inc. Other participants were Wilbur Smith Associates, Inc., Hammer, Siler, George Inc., and Cranston, Robertson and Whitehurst, P.C. The plan was completed in 1996. [103]

The SCPRT set out to create partnerships with participating regions at the outset of the SCNHC Plan in 1996. This process took over two years and the functions accomplished by the partnership included program direction for the Corridor; coordination of Public Agencies at state, regional, local and federal levels; providing technical assistance to public and private entities of the Corridor; development of standards and criteria for Corridor-wide capital improvement and publications; product development and support; and providing public information.[104]

Purposes of the Heritage Corridor Plan

The Heritage Corridor Plan laid out numerous purposes for developing the Corridor. First, the Plan will enable and empower the residents and instill pride in communities as

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[103] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[104] *Ibid.*

tourists appreciate the rich heritage of the South Carolina landscape and its people.

Secondly, the Plan will improve the tourism product throughout the Corridor by developing

new attractions and enhancing existing ones. Economically, the Plan will have several

benefits for the communities within the Corridor. The Corridor will reinforce existing

communities, improve local quality of life, and help to encourage rural economic

development. Also, unique heritage resources will be preserved and maintained.[105]

The Plan operates on three levels: corridor-wide, regional, and local. Each of these

works together to implement the Plan and achieve the goals of the SCNHC.

The Concept

The concept for the South Carolina Heritage Plan is shown in Figure 6. The Plan

served as a catalyst to develop the SCNHC and achieve self-sustainability within ten years.

In the early stages of development, SCPRT staffers ran the organization of the SCNHC, but

after development began to happen in the SCNHC, positions were taken over by local

stakeholders and officials.[106]

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[105] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor
Marketing Plan," 1996.
[106] *Ibid.*
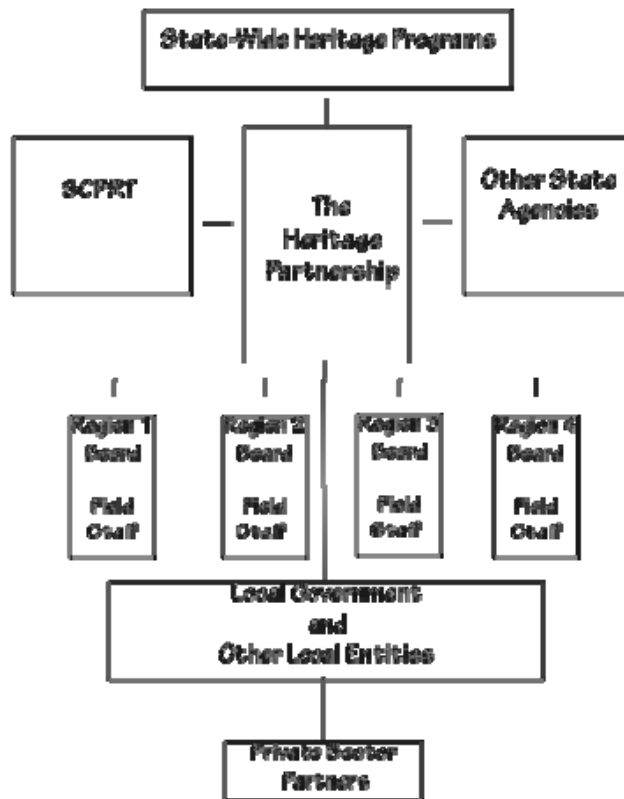
Figure 6: SCNHC Concept:[107]

Phasing Strategy

The Heritage Corridor Plan includes an overall implementation phasing strategy.

The phases are developed as funding and resources become available in each of the four

regions. Phase 1 includes establishing the Corridor's identity and building management

strategies. Phase 2 emphasizes the development and evaluation of new tourism products

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[107] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor
Marketing Plan," 1996*.*

within the Corridor. Phase 3 involves the expansion of tourism products and a transition to a self-sustaining form of management.[108]

The following figure shows the three phases of implementation and their purposes within the Corridor:

SCNHC Phasing Approach

	Phase 1: Establish Identity of Corridor and Mobilize the Plan	**Phase 2: Initial Tourism Development Projects**	**Phase 3: Expand New Projects and Complete Visitor Infrastructure**
Purpose	Build Capacity	Pilot Projects	Complete Plan Sustainability
Management	Interim SCPRT Management Establish the Partnership	Expand finance and stewardship capabilities of entity	Complete state/local compacts, local lead role
Byways/Linkages	Corridor-wide Byways and Interstate Signs	Regional Discovery Trails	Complete Signage
Visitor Services	Supplement existing Visitor Centers and Welcome Centers	Pilot Regional Heritage Discovery Center	Complete Regional Heritage Discovery Centers
	Regional and Corridor-wide Guides	Initiate Community Guides	
			Complete Community Guides
	Pilot waysides	Expand waysides	
			Complete waysides
	Initiate Heritage Hosts Network	Expand Heritage Hosts Network	
Tourism Products	Feasibility analysis to identify most promising initiatives	Pilot project implementation in each region	Expand new Product Development
Costs/Phase	$3,237,000	$8,160,375	$8,822,625

Figure 7: Phasing Approach:[109]

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[108] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[109] *Ibid.*

Community Involvement

Involving nearly one thousand citizens, organizational representatives, and government officials, the community involvement factor in developing the plan and its implementation was intense. An Advisory Task Force was created by Executive Order Number 94-15 by the Governor to ensure that local residents were involved in every step of the process. The Advisory Task Force consisted of representatives from all of the counties included within the Corridor and representatives from ten state agencies. The Task Force met on a monthly basis during the planning process to discuss ideas and raise concerns.[110]

Visitor Services

Several visitor services and facilities are recommended in the Heritage Corridor Plan. These include:

- Support of existing visitor centers in the Corridor and encouragement of community-based visitor facilities;
- Development of new Regional Heritage Discovery Centers;
- Production of corridor and community guides;
- Community interpretation through a program of wayside exhibits; and
- Development of a Heritage Hosts program to designate and identify unique heritage assets as well as to provide training to service providers.[111]

The Heritage Corridor Plan calls for the design and construction of four Regional Heritage Discovery Centers, one located within each region. The Discovery Centers can

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[110] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[111] *Ibid.*

serve as departure points for tours and give regional reference to the Corridor. Each Discovery Center will provide regional information about what there is do to and see within that region as well as the inclusion of a regional interpretative exhibit used to explain the significance of that region.[112]

Along with creating new types of visitor services, the Corridor can make use of the existing visitor centers. The SCPRT staff operates welcome centers located along the Interstate highways, and is a key partner to the SCNHC. Also local visitor centers exist in many communities within the Corridor and should be utilized.[113]

New Tourism Products

New tourism products will help promote the SCNHC and increase economic development within the Corridor. Regional Discovery Centers are one example of new product development; however, there are other tourism products that could be beneficial as well. The SCPRT and the State should provide assistance in funding for these initiatives. Potential tourism products should be evaluated for their prospective economic impacts and compatibility of the product with the interpretive themes of the Heritage Corridor Plan. Potential products should also be evaluated based on the quality of the potential tourist experience, the amount of community involvement and support it will need, and the feasibility of local and private commitments to support the project in terms of funding.[114]

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[112] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[113] *Ibid.*
[114] *Ibid.*

Managing and Preserving Resources

The Heritage Corridor Plan includes a section on the stewardship of historic, cultural, and natural resources as a catalyst for developing tourism. The Plan outlines that this effort must be implemented at the local level and those resources which are privately owned will raise questions as to who is responsible for preserving and managing them. Also, there are several types of resources within the Corridor, which are often not recognized as being important to the Corridor. These resources, such as rural landscapes, must not be take for granted and should be maintained and preserved as well. Stewardship will require the involvement of local government officials and citizens, as well as cooperation with other state and local interests, in order to achieve the goals of managing and preserving resources laid out in the Plan. Elements of the Plan include historic structures and settings preservation, rural landscape preservation, natural resource conservation, cultural resource preservation and development, and downtown revitalization.[115]

Staffing

The Heritage Corridor Plan calls for a Board of Directors, an Advisory Board, and Partnership Staff.

The mission of the Board of Directors is to support program goals, offer advise on policy development, provide oversight on Partnership activities, and assist in obtaining creative fiscal support solutions. The Board consists of seventeen total members. Eight

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[115] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.

members represent the private sector as well as the state and local agencies within the Corridor.   Four members represent the regions of the Corridor, and five members represent the state agencies most closely involved in the Corridor's Development.[116]

The Advisory Board's purpose is to provide insight and comments to the Partnership about specific issues. The size of the Advisory Board ranges from 25-40 members, with members representing local and community interests, tourism and hospitality interests, and representatives from regional, state, and federal agencies. Members are appointed by the Program Manager of the Partnership and are selected to represent a balance of geographical and cultural representation of the Corridor.[117]

The Partnership Staff has the challenge of launching the program and this is done through members of the SCPRT in cooperation with the Corridor's regions. The staff includes a Program Manager, administrative support, and four regional field managers. Within two years after implementation of the Plan, the Partnership Staff changes hands from the members of the SCPRT to local representatives and begins its establishment as a self-sustainable entity.[118]

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[116] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[117] *Ibid.*
[118] *Ibid.*

Plan Conclusions and Action Agenda

Implementation of the Heritage Corridor Plan requires the continuous progress on several tasks. First, the establishment of the Heritage Partnership will enable partnerships and seek the initial funding requirements.[119]

Secondly, the initiation of the partnership with the National Park Service through the NPS's Atlanta and Washington offices will solicit their support for Federal designation of the Corridor.[120]

Also the execution of a cooperative agreement between the SCPRT and SCDOT is necessary to initiate the planning and design of scenic byways, signage, and appropriate Corridor view shed management.[121]

In addition, the preparation of Corridor guides for the installation of visitor and welcome centers is an important step in preparing and attracting Corridor tourists.[122]

Working cooperatively with local entities in conducting feasibility studies and trying new tourism products are other tasks that are ongoing throughout the Corridor.[123]

Developing stewardship agreements, marketing strategies and materials, and monitoring mechanisms to measure the impact of the Corridor are other tasks that will need to be accomplished on a regular basis.[124]

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[119] Lane, Frenchman, and Associates, Inc. "South Carolina National Heritage Corridor Marketing Plan," 1996.
[120] *Ibid.*
[121] *Ibid.*
[122] *Ibid.*
[123] *Ibid.*
[124] *Ibid.*

Results and Outcomes

The SCNHC has seen great success since its implementation in 1996. Visitation to Regional Discovery Centers has increased by 25 percent since the program began tracking visitors in 2002. Grants to the Discovery Sites in the Corridor's fourteen counties have contributed to the $30 million in private and public funds for site enhancement, including preservation and conservation. In a 2005 survey, more than 89 percent of the heritage sites within the Corridor reported at least a 50 percent increase in tourist visitation since becoming involved with the SCNHC.[125]

Case Study 1 Analysis

This case study illustrates the success of cultural heritage tourism at a local, statewide, and national level. The South Carolina National Heritage Corridor proves that no matter the size or diversity of people and heritage resources, heritage tourism can establish pride in one's community, unify a community, region, or state, and provide economic revitalization to even the most rural areas.

The SCNHC achieved its success through the hard work and dedication of local residents, businesses, non-profit organizations, and government officials and agencies. By combining resources and ideas from all parties, the SCNHC was developed based on its many strengths, rather than its weaknesses. Through creative funding strategies, effective marketing research, marketing, and the development of the Heritage Corridor Plan, the SCNHC became self-sufficient two years after its creation.

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[125] "Heritage Tourism, South Carolina National Heritage Corridor, Corridor Discovery System." Best Practices in National Heritage Areas. Fall 2005.

This case study supports the conclusion that eight critical success factors exist in successful cultural heritage tourism operations at any level, whether it be specific to a heritage attraction, a small town, a big city, a region, a Heritage Corridor, a state, or even at a national level.

There were eight factors present in the South Carolina National Heritage Corridor study that ultimately determined its success. While these may not be the only contributing factors, the main factors includes the following: 1) Assessment of Cultural Heritage Tourism Potential; 2) Establishment of Clear Goals and Objectives; 3) Strategic Planning; 4) Management and Preservation of Heritage Assets; 5) Preparation for Tourism; 6) Maintaining Authenticity; 7) Effective Marketing; and 8) Creating Partnerships and Product Packaging. These critical success factors will be discussed in detail in the following chapter.

Case Study 2: "Market-Based Product Development in Heritage Tourism" by Duncan Light and Richard Prentice

This case study in cultural heritage tourism marketing research illustrates the benefits of marketing research in creating a marketing plan and in the development of tourism products.

Duncan Light and Richard Prentice conducted a marketing research study at a number of heritage tourism sites in Wales, especially focusing on regional scale heritage tourism. Since there was plenty of existing marketing research for heritage sites on a national or local level at the time of their research, Light and Prentice aimed to add to this research on the less covered area of regional tourism. Based on previous research in the

heritage tourism field, Light and Prentice concur that the effective management of heritage

tourism, or any form of tourism for that matter, depends largely upon adequate measuring

of tourism impacts.[126]

Methodology

Heritage tourism has become popular around the world, and because of its

popularity, it is a highly competitive market-oriented business. Heritage sites compete in

attracting and maintaining a viable portion of the market.[127] Light and Prentice aimed to

attain meso-scale heritage tourism marketing data to discover who actually made up the

heritage tourism market in Wales. They accomplished this task by the aggregation of

individual site surveys and personal interviews with 3,264 individuals over the course of

three summer tourist seasons at fifteen of Wales' popular heritage sites. The findings of

this study are important because discovering the demographics of the tourist sector

through marketing research is essential in heritage tourism product development, such as

interpretation.[128]

Findings

Light and Prentice found that in the 15 tourist attractions within North, South, and

West tourist regions of Wales, the markets changed from region to region. They listed two

types of visitors: tourists (vacationers staying away from their area of permanent

residence) and local residents (day-trippers). They found that North Wales consisted of 80

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[126] Light, Duncan and Richard Prentice. "Market-Based Product Development in Heritage Tourism." *Journal of Tourism Management*, 1994. Vol. 15, No. 1. 27-36.
[127] *Ibid.*
[128] *Ibid.*

percent tourists, thus in this region the majority of consumers here are not Welsh and would need more basic and background information during the presentation and interpretation of heritage assets. Heritage interpretation in this region should assume little prior knowledge to Welsh history and culture.[129]

In South Wales, day-trippers (mostly Welsh residents) make up 30 to 50 percent of the visitors and the rest are foreign tourists. In this region, it makes sense to design interpretation to satisfy the needs of both groups. Light and Prentice argue that before interpretative planning begins, the groups should be analyzed for their level of knowledge and the interpretation should then be designed according to the lowest common denominator of existing knowledge. Also in this region, there was a greater percentage of local residence with repeat visiting, indicating a need for the presentation and interpretation of heritage assets to be changed regularly.[130]

Finally, in West Wales, the market is similar to North Wales with the tourists being the majority group. The following lists the breakdown of visitors to North, South, and West Wales:

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[129] Light, Duncan and Richard Prentice. "Market-Based Product Development in Heritage Tourism." *Journal of Tourism Management*, 1994. Vol. 15, No. 1. 27-36.
[130] *Ibid.*

Visitors to North Wales:

- Northern England and the Midlands   53%
- Southeast England   22%
- Southwest England   5%
- Wales   5%

Visitors to South Wales:

- Southeast England   46% (due to accessibility)
- Northern England and the Midlands   21%
- Southwest England   7%
- Wales   3%

West Wales:

- Northern England and the Midlands   35%
- Southeast England   39%
- Southwest England   14%

These findings raise obvious implications for cultural heritage product development strategies. It makes sense that heritage site interpretation should be developed with the tourists in mind therefore different strategies should be adopted at different sites since the type of tourist will vary from site to site. This data provides insight to how heritage assets should be marketed in Wales and to regions of England. For example, because 46 percent of the visitors to South Wales travel from southeast England, marketing efforts should likely be focused on the region of southeast England.[131]

Also, since the type of visitor is similar at sites in north and west Wales, it may be possible to develop interpretive messages, marketing tools, and media in a similar fashion. A large portion of visitors to these regions travel from northern England and the Midlands,

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[131]Light, Duncan and Richard Prentice.   "Market-Based Product Development in Heritage Tourism." *Journal of Tourism Management*, 1994. Vol. 15, No. 1. 27-36.

therefore, interpretation could also be designed in such a way that it could reference similar sites in northern England and the Midlands in order to cater to that audience.[132]

Conclusions

Light and Prentice examined the demand for cultural heritage tourism on a meso-scale in Wales. This study demonstrates how there is tourist demand for a variety of types of heritage attractions, even on a regional scale. Regional patterns of tourists can be identified and interpretation, presentation, and the marketing strategies of these regions differ according to the types of tourists they attract. This study has also proven the advantages of having marketing data available in developing the site and promoting it. Also, interpretations should be site-specific and tailored to the specific audiences of that site, and marketing efforts should specifically target those audiences prior to arrival.[133]

Case Study 2 Analysis

Duncan and Light's research in Wales has contributed to the field of heritage tourism greatly. This case study portrays the importance of knowing who the tourists are that come to a particular site. Knowing the tourists can help make a tourism effort successful because it enables the managers, planners, and groups involved to create effective marketing, implementation, and management strategies for the heritage attraction. This case study also supports the conclusion that there are critical success factors that may contribute to the success of cultural heritage tourism efforts and that they

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[132] Light, Duncan and Richard Prentice. "Market-Based Product Development in Heritage Tourism." *Journal of Tourism Management*, 1994. Vol. 15, No. 1. 27-36.
[133] *Ibid.*

can be present at any scale of heritage tourism operation. Many of these factors were

present in both the SCNHC case study and in this one, which suggests that they are

generally applicable to cultural heritage tourism operations, though these operations differ

in scope and size.

The eight critical success factors that have been developed through researching

literature and evaluating the case studies discussed in this chapter will be discussed in

further detail in the next chapter.

CHAPTER V

CRITICAL SUCCESS FACTORS, CONCLUSIONS, AND RECOMMENDATIONS

Introduction

What makes a "successful" heritage tourism operation? There are countless types of heritage tourism attractions and countless more ways to go about implementing them. A study was conducted in 2000 by Brian Garrod, Senior Lecturer in the Faculty of Economics and Social Science at the University of West England, and Alan Fyall, Lecturer in the Marketing Cognate Group in the Napier Business School. Their current research focuses on the development and implementation strategies for pursuing sustainable tourism, and they argue that cultural heritage tourism is a form of sustainable tourism.[134] Experts on heritage tourism, government officials, and managers of heritage tourism attractions suggested the following criteria through Garrod and Fyall's survey research:

- The attraction must be affordable and visitor-friendly.
- It must be physically and intellectually accessible.
- It must balance the needs of the visitor and the conservation imperative.
- It must be able to maintain authenticity and the integrity of the site.
- It must deliver value for money.[135]

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[134] Fyall, Alan and Brian Garrod. "Managing Heritage Tourism." Annals of Tourism Research, Vol. 27, No. 3, 682-708, 2000.
[135] *Ibid.*

Based on literature and the case studies listed in Chapter Four, a list of eight critical success factors has been developed. These factors are recurring in most all the literature used for this thesis and they are present in both case studies. This chapter will discuss the eight critical success factors that are present in any successful cultural heritage tourism operation followed by recommendations for communities that are trying to create effective heritage tourism development. The scope and scale of these factors will vary depending on the size of the cultural heritage tourism undertaking, but all critical success factors should exist, whether formally or informally, at the local, regional, statewide, or national level of cultural heritage tourism development. Often, these factors will overlap in some ways since they are closely tied together. These factors include:

1. Assessment of Cultural Heritage Tourism Potential;
2. Establishment of Clear Objectives and Concepts;
3. Strategic Planning;
4. Management and Preservation of Assets;
5. Preparation for Tourism;
6. Maintaining Authenticity;
7. Effective Marketing Strategies; and
8. Creating Partnerships and Packaging Tourism Products;

Critical Success Factor 1: Assessment of Cultural Heritage Tourism Potential

First, a community must have something worth visiting. But how does that community know what they have? Assess the potential. Make a list of the cultural "inventory" that is in your area. This may require research, survey, or just getting out into the community and talking to residents. Also, consider visitor attractions and visitor experiences such as lodging, restaurants, public restrooms, etc. that could contribute to the

overall tourist experience. It must be decided whether the resources are ready to

accommodate visitors, and if not, then what must be accomplished so that they are ready

for tourism.[136]

Secondly, establish what human and financial resources are available during the

tourism development process. Getting involved with the right people in the beginning can

aid in the success of tourism development down the road.[137]

An inventory of both heritage and human assets was undertaken in both the SCNHC

case study and the study conducted in Wales discussed in the previous chapter.

Recommendation:

Communities should use this critical success factor as their first step in cultural

heritage tourism development as it serves as the foundation for the other seven critical

success factors.

Critical Success Factor 2: Establishment of Clear Objectives and Concepts

Establishing a vision of what cultural heritage tourism will be like in a town is an

important part in getting the parties involved on the same page. What kind of tourism do

the stakeholders and residents want?   Will it be self-guided tours, interpretive signage

around town, tour packages that are sold to individual tourists, or guided group tours?

Each tourism product takes different efforts to plan and develop. People in the community,

business, government officials, and other stakeholders involved in the cultural heritage

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[136] "Share your Heritage, Getting Started in Cultural Corridor Development."
http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.
[137] *Ibid.*

tourism initiative must establish clearly what it is that they seek to accomplish through tourism. A variety of opinions and ideas will come to the table at this point.

Recommendation:

Communities who are attempting to develop a cultural heritage tourism plan will first need to achieve this critical success factor. It can often be a long process to get groups to agree on clear goals and objectives, but can save time in the long run because everyone will be on the same page. Key stakeholders should also establish clear expectations of heritage tourism and should know what expectations are required of them.

After establishing a general cultural tourism vision, the next step is to develop a strategic plan. Mission, goals, objectives, and action steps should be developed during this phase.

Critical Success Factor 3: Strategic Planning

Strategic Planning is the most important factor in the success of the cultural heritage tourism development process. It is also usually the phase that will take the most time and effort. After determining the resources, or tourism products, it is now time to plan and organize the development process. First, it must be determined who is going to be involved, and this can be a bit of a challenge. If too many individuals are involved, the development can become too complicated and slow. If too few parties are involved, however, the process can get overwhelming and you may not have enough support from the outset. Key stakeholders should be involved in the process from the beginning. [138]

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[138] "Share your Heritage, Getting Started in Cultural Corridor Development." http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.

Early tourism planning rarely placed emphasis on public participation and relied mainly on planners to do all of the work. As tourism planners have learned the hard way over time, not involving the public in the tourism planning process can lead to resentment among residents, tourist dissatisfaction, and ultimately decreased visitation. Tourism planners have come to find that the development of authentic tourism experiences relies upon "ordinary people" as well as the participation of the public, private, and nonprofit organizations.[139]

It is nearly impossible to discuss cultural heritage tourism planning without also discussing cultural heritage tourism management. Management of cultural heritage tourism sites has only emerged within the last twenty years, but managers have often focused solely on the cultural heritage resource as the central part of the planning and management process. Unfortunately, many heritage sites around the world are managed poorly due to lack of effective tourism planning. They fail to include market appeal, economic factors, and conservation policies and assessments in their site and tourism planning efforts. These heritage attractions often need commodification to attract tourists and maximize their potential.

Recommendation:

Communities should use the following six steps as a guide to their heritage tourism planning efforts:

Harrill and Potts' Six Steps of Sustainable Tourism Planning

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[139] Harrill, Rich and Thomas D. Potts. "Enhancing Communities for Sustainability: A Travel Ecology Approach. Department of Parks, Recreation, and Tourism Management, Clemson University. *Tourism Analysis*, Vol. 3, 133-142. 1998.

Many studies have been conducted in the field of tourism planning and numerous theories have been made about how to go about planning for tourism. Rich Harrill and Thomas D. Potts, authors of "*Enhancing Communities for Sustainability: A Travel Ecology Approach*," have developed a list of six crucial steps for sustainable tourism planning that can be applied to any cultural heritage planning effort. These steps are listed below:

1. Discovery
2. Mutuality
3. Locality
4. Historicity
5. Potentiality
6. Enhancement

Step 1: Discovery

This is the initial phase of tourism planning and involves the participation of relevant stakeholders, which may include government officials, public organizations, tourism industry associations, resident organizations, social agencies, and special interest groups. During this phase, stakeholders will come together and inventory their own social, economic, historic, cultural, and ecological resources. Discovery also involves the public, and at this time mutual fears and expectations are established.   Goals and objectives for the tourism operation should be set and relevant data should be collected. This may include marketing research, historical research, and other data.[140]

This is the most challenging phase during the tourism planning process because different parties will have different ideas and expectations. Planners should try to mitigate conflict that arises between stakeholders. As Harrill and Potts argue, conflict is a necessary part of the process:

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[140] Harrill, Rich and Thomas D. Potts.   "Enhancing Communities for Sustainability: A Travel Ecology Approach. Department of Parks, Recreation, and Tourism Management, Clemson University.   *Tourism Analysis*, Vol. 3, 133-142. 1998.

*"A good community is one in which there is argument, even conflict, about the
meaning of the shared values and goals, and certainly about how they will be
actualized in everyday life. Community is not about silent consensus; it is a
form of intelligent, reflective life, in which there is indeed consensus, but where
the consensus can be challenged and changed—often gradually, sometimes
radically—over time."*[141]

Another effective way to begin the planning process is to conduct a SWOT analysis
(Strengths/Weaknesses/Opportunities/ Threats) to determine the internal and external
forces that will help and harm your tourism development process.[142]

Step 2: Mutuality

Harrill and Potts describe this phase as "residents engaging in a common language
emphasizing shared values, ideas, and concerns, while at the same time respecting
individual perspectives." At this time, partnerships must be formed to build social capital.
Social capital refers to "networks, norms, and trust, which facilitate coordination and
cooperation for mutual benefit."[143] Social capital is important to the development of
tourism because it generates the hospitality that makes a community desirable to tourists
and allows for the sharing of scarce resources, especially funding, that are necessary for a
successful tourism operation.

Conducting public meetings to keep the residents informed of the tourism efforts
and asking for their input is important to the overall process. By keeping residents

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[141] Harrill, Rich and Thomas D. Potts. "Enhancing Communities for Sustainability: A Travel
Ecology Approach. *Tourism Analysis*, Vol. 3, 133-142. 1998.
 (Bellah, 1998, 16).
[142] "Share your Heritage, Getting Started in Cultural Corridor Development."
http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.
[143]Harrill, Rich and Thomas D. Potts. "Enhancing Communities for Sustainability: A Travel
Ecology Approach.. *Tourism Analysis*, Vol. 3, 133-142. 1998. (Putnam, 1993, 35).

involved in the planning process, one is more likely to build support for the process and understand the desire of the community. Also, the audience should be carefully considered. By understanding what residents are already doing in the community and who is visiting from outside the community, there will be a broader understanding of what needs to be done to maximize the tourism potential.[144]

During the planning process, the following questions should be answered to gain insight regarding the tourism potential and expectations of the community in order to develop a strategic plan to address each question:

1. What are the physical boundaries of your cultural heritage tourism area? Will it be exclusively in a certain area of town, across the entire town, or will you take a regional approach?
2. Who is the leading organization for tourism in your town?
3. What is trying to be accomplished through cultural heritage tourism?
4. Who are the key players that need to be involved in order for the process to be successful?
5. What kind of financial resources are available?
6. What kind of staffing or coordination will tourism development require in the area and how can its sustainability be ensured?[145]

Step 3: Locality

Residents must be aware of their environment and know what historic, cultural, and ecological resources they have available to develop into tourism products. Harrill and Potts argue, "Locality begins with the notion that environmental awareness towards

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[144] Harrill, Rich and Thomas D. Potts.   "Enhancing Communities for Sustainability: A Travel Ecology Approach.. *Tourism Analysis*, Vol. 3, 133-142. 1998.
[145] "Share your Heritage, Getting Started in Cultural Corridor Development." http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.

environments such as rainforests or savannas begins with an awareness of common place environments" and that the awareness of locality is "critical to the development of 'sense of place.'"[146]

Step 4: Historicity

Planners of tourism should know everything they possibly can about the oral and written history of the place for which they are planning. Knowing the history of a place beyond what is obvious is the key to understanding its culture, or in many cases, multiple cultures within the same community. In recent years, tourism planners have put more emphasis on the historical aspects because knowing the history of a place can serve as a way to establish community pride and gain support for the tourism operation. Also, it helps to know the history of a community when deciding upon a branding and marketing strategy. Selznink (1996) describes this process beautifully:

> "*The bonds of community are strongest when they are fashioned from strands of shared history and culture. They are weak and precarious when they must depend on very general interests or abstract ideas. Furthermore, the character of a community largely reflects the particularities of custom, language, and institutional life; a heritage of significant events or crisis; and historically determined attributes such as size, geography, and demography.*"[147]

Historicity that is by nature democratic and represents the cultural heritage of all residents is important for the development of an authentic tourism experience.

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[146] Harrill, Rich and Thomas D. Potts. "Enhancing Communities for Sustainability: A Travel Ecology Approach. *Tourism Analysis*, Vol. 3, 133-142. 1998
[147] *Ibid.*

Step 5: Potentiality

According to Harrill and Potts' research, achieving sustainable cultural heritage tourism is tourism that has reached its potential in maintaining a high quality of life for the residents and one that has created a community where human potential is maximized.[148] Without a healthy population, strong social networks, which require intelligent and creative decision making, cannot happen.[149]

Both the evaluation of the human potential and the potential of heritage resources should be evaluated, as both greatly contribute to the success of the overall tourism operation.

Step 6: Enhancement

Existing community resources should be enhanced as well as developing a way to market those resources to tourists. Enhancement also means that tourism planners should exercise their expertise within the larger democratic framework, realizing that tourists have many of the same needs as the residents, such as adequate housing, public safety, environmental quality, and cultural amenities.[150] The way to meet these needs for both tourists and residents is to empower the residents and plan for them first.

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[148] Harrill, Rich and Thomas D. Potts.   "Enhancing Communities for Sustainability: A Travel Ecology Approach. *Tourism Analysis*, Vol. 3, 133-142. 1998
[149] *Ibid.*
[150] Millar, Sue. "Heritage Management for Heritage Tourism." Journal of Tourism Management, March 1989. 9-14.

Most importantly, this phase involves the long-term planning for the preservation of heritage resources. Long-term planning should be an integral and continuing preservation policy, and is essential in producing a high quality experience for tourists.[151]

Critical Success Factor 4: Management and Preservation of Heritage Assets

Management and preservation of heritage assets is not only important to the present generation of tourists but also to the future generations of tourists who will come in contact with the heritage assets. Heritage management is a new concept that has developed in response to the dramatic increase of cultural heritage tourism in the last two decades. Heritage resources are irreplaceable resources to the tourism industry so naturally preservation is a vital component in their management. Unlike other tourist attractions, such as sports centers, theme parks, resorts, and many other attractions, an updated model cannot replace heritage attractions once the current one has worn out. Because heritage attractions are irreplaceable, long-term planning is essential in order to meet the needs of the growing tourist market. Good cultural heritage tourism management places a major focus on interpretation and preservation while enabling the critical balance between the needs of the heritage resource and the tourist.[152]

Figure 8 on the following page shows the relationship between conservation and tourism and the public accountability of cultural heritage tourism management.[153]

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[151] Millar, Sue. "Heritage Management for Heritage Tourism." Journal of Tourism Management, March 1989. 9-14.
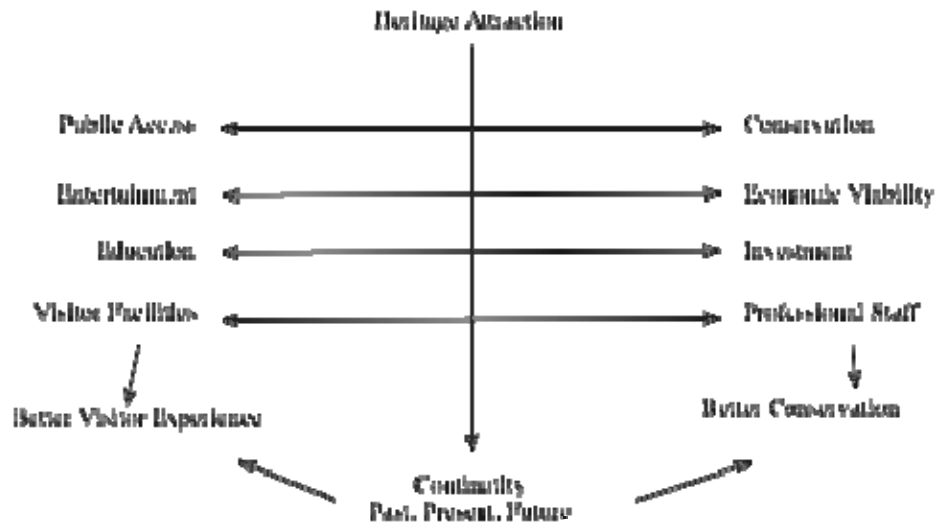[152] *Ibid.*
[153] *Ibid.*

Figure 8: Conservation, Tourism, and Heritage Tourism Management

Management is essential to cultural heritage tourism success, and the conflicting demands of tourism and conservation due to poor management can be seen in stark contrast in developing countries. India is a prime example where conservation has not been able to keep up with the fast pace of tourism explosion. Dr. Narayani Gupta gave his opinion at the Second World Congress on Heritage Presentation and Interpretation at Warwick University, United Kingdom, 1988:

> "Conservation is vitally important in India, at once an old civilization and a developing country…Increased tourist traffic has led to deterioration in the fabric of some of the structures, against which corrective measures need to be taken."[154]

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[154] Millar, Sue. "Heritage Management for Heritage Tourism." Journal of Tourism Management, March 1989. 9-14.

Other international examples of poor heritage management include the empty

beaches of Montevideo, Uruguay damaged by pollution in the River Plate produced by

chemical manufacturing industries; the lack of adequate sewage disposal by the

Mediterranean seaside resorts due to lack of planning and management; and the dramatic

contrast between this modern development and the indigenous people on the Balearic

Islands.[155]   Each of these issues could have been prevented if good cultural tourism

management strategies were implemented. Instead, heritage and culture are compromised

and the visitor experience is not what it could be.

Heritage sites provide many tourist attractions, community identity, a valuable tool

for educating the public, and potential for economic regeneration. The four variables that

managers should consider are tourist attraction, community identity, formal and informal

education, and economic regeneration.[156] The emphasis the manager puts on any one of

these variables will differ according to the type of heritage site he or she is managing. Too

often, managers put most of the emphasis on the heritage resource through preservation

and conservation. While heritage sites definitely need this emphasis, they also must be

funded adequately through partnerships and business planning.[157] However, heritage sites

that are primarily led by the market face a different problem; managers who have to run a

heritage site on a commercial basis have trouble finding funding for preservation and

conservation. Therefore, the heritage manager's success depends on how well he or she

[155] Millar, Sue. "Heritage Management for Heritage Tourism." Journal of Tourism
Management, March 1989. 9-14.
[156] *Ibid.*
[157] *Ibid.*

balances both the requirements of the heritage resources, the host community, and the demands of the tourists.[158]

Interpretation and Presentation of the Heritage Product

Heritage site management also involves the interpretation and presentation of the heritage tourism product. "Heritage interpretation provides the key to a successful management policy. Heritage interpretation and presentation are central to the management process."[159] Interpretation is important because it serves as the tool for educating the public and gaining support through knowledge and awareness. Presentation of the heritage site can take many forms, including the various media of guides, information boards, re-enactments of historic events, and creative interactive displays. Presentation both educates and entertains the visitor. Millar states,

> Interpretation and presentation provide the underpinning to management, marketing, and financial decisions and strategies. Interpretation is the starting point and presentation the coherent culmination of these activities serving a disparate clientele in a variety of ways.[160]

Recommendation:

Successful management of heritage tourism attractions is not easy, but it can be done if managers balance the needs of the community, the tourists, and the heritage site. Also, managers should not act only as curators to the site, but also as business managers so that proper funding can be attained. Finally, managers should

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[158] Millar, Sue. "Heritage Management for Heritage Tourism." Journal of Tourism Management, March 1989. 9-14.
[159] *Ibid.*
[160] *Ibid.*

consider what type of interpretation will best educate and entertain the public. (See

Case Study 2 in Chapter 4 for examples of proper interpretation strategies).

Critical Success Factor 5: Preparation for Tourism

In addition to Harrill and Potts' six steps to sustainable cultural heritage tourism

planning, physically and financially preparing a site, community, municipality, or region for

tourists is essential to success. This is accomplished by using a well-developed strategic

plan. The specific necessary actions will vary for each new heritage tourism effort

depending on the type of resources available, location, and what has already been done for

preparation. First, focus on accomplishing what needs to happen that will ensure a positive

experience for visitors. These steps may include:

1. *Making the sites and programs come alive*: convey the unique story of the place's

   history to the visitor through signage, printed materials such as guidebooks or

   brochures, guided tours, special programs or events, or other interpretive and

   educational programs. Ensure that these experiences provide high quality and

   authenticity.[161]

2. *Preserve and protect your resources*: this is the reason visitors are coming in the first

   place, right? Identify and address any potential threats to important landscapes,

   historic buildings or districts, collections or local traditions that contribute to the

   tourist experience to ensure that the resources are sustainable.   Protecting the

   historic, cultural, and natural resources can create tourism opportunities as well. In

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[161] "Share your Heritage, Getting Started in Cultural Corridor Development."
http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.

the case of the Yuma Crossing National Heritage Area (YCNHA), the preservation of

the Yuma Crossing East Wetlands area resulted in the reclamation of 300 additional

usable acres within three years of the project and a restored natural habitat that

residents and visitors are now enjoying for recreational activities, such as bird

watching, hiking, and canoeing.[162]

3. *Create Partnerships*: talk with other organizations and individuals that can

   contribute to the success of the heritage tourism program. Create partnerships with

   these parties.[163]

4. *Reach out to the public for support*: keeping the public informed about progress and

   identifying and addressing any problems the public may have will help create a

   sustainable heritage tourism operation.[164]

Recommendation:

Preparation for tourism will vary from place to place. After a community has

conducted an inventory of both heritage and human assets, the needs of the community

will become more apparent. Preparation can be costly, so strategic planning and phasing

can make it easier to accomplish over a longer period of time. Communities should

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[162] Prola, Rosemary. "Best Practices in National Heritage Areas, Fall 2005: Natural Resource Conservation, Yuma Crossing National Heritage Area, Yuma Crossing East Wetlands Restoration." 2005.
[163] "Share your Heritage, Getting Started in Cultural Corridor Development." http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.
[164] *Ibid.*

obviously prepare for tourists by doing whatever is the most urgent thing first, whether it

be building a welcome center or improving infrastructure.

Critical Success Factor 6: Maintaining Authenticity

In the past few decades as cultural heritage tourism has developed a presence in the

tourism industry, the topic of authenticity has been highly debated especially in the context

of the tourist's experience. There are two main arguments. The first is that authenticity is

essential in creating "honest" experiences of culture and history that tourists experience

that truly represent the culture of that place.

The second argument is that sites should maintain authenticity, but the experience

can be commodified for a more entertaining tourist experience.   One scholar writes, "The

very act of a tourist is to consume inauthentic and commodified products and events…" and

further "to consider contemporary tourism as being deleterious to the concept of

authenticity is perhaps to romanticize…"[165] This argument suggests that the modern

tourist is either consciously or unconsciously drawn to inauthentic experiences.

Commodification of heritage has led some places to completely fabricate or recreate

history. One absurd example of this tactic is the town of Riverside, Georgia, located I central

west Georgia, which did not even exist until 1998 when developers created its entire

history complete with sepia photographs said to show the town in the nineteenth century.

Developers also constructed "new" historic buildings. This effort is a ridiculous attempt to

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[165] Alonso, Abel Duarte, Kyungmi Kim, and Martin A. O'Neill. "In search of authenticity: a case study examination of the transformation of Alabama's Langdale Cotton Mill into an industrial heritage tourism attraction." *Journal of Heritage Tourism,* Vol. 5, No. 1., Feb 2010. 33-48.

attract tourists and new residents, though in some ways it does achieve those goals, it is not a sustainable form of heritage tourism.[166]

Despite the controversies regarding authenticity, it remains a critical factor in the success of cultural heritage tourism operations. Authentic representation of a place's unique characteristics and culture is what sets that place apart from any other and provides the tourist with a unique, one-of-a-kind experience. It is also the factor that allows a destination to market itself separately from other destinations, increasing its edge in the competition for tourists and adding real value and appeal.[167]

Recommendation:

Development pressures often push heritage sites and communities away from authenticity. It is recommended that individuals and community groups take pride in the authentic heritage of a place and preserve it for future generations. Studies have shown that tourists crave an authentic and entertaining experience, so it is important for site managers to consider this when developing interpretive programs.

Critical Success Factor 7: Effective Marketing

"*Marketing is so basic that it cannot be considered a separate function. It is the whole business seen from the point of view of its final result, that is, from the customer's point of*

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[166] Brink, Peter H. "Heritage Tourism in the U.S.A.: Grassroots Efforts to Combine Preservation and Tourism." *APT Bulletin,* Vol. 29, No 3. 1998. 59-63.
[167] Alonso, Abel Duarte, Kyungmi Kim, and Martin A. O'Neill. "In search of authenticity: a case study examination of the transformation of Alabama's Langdale Cotton Mill into an industrial heritage tourism attraction." *Journal of Heritage Tourism,* Vol. 5, No. 1., Feb 2010. 33-48.

view…Business success is not determined by the producer but by the customer." --Peter

Drucker, Social Ecologist, "The Inventor of Management"[168]

Following the preparation phase, the heritage tourism product must be marketed to

the public. Many communities, towns, and regions conduct marketing research at this stage

to discover target markets and how to reach them.

For the purposes of this section, marketing can be defined as "a social and

managerial process by which individuals and groups obtain what they need and want

through creating and exchanging products and value with others."[169]

"Marketing's purpose is to provide real value to targeted customers, motivate

purchase, and fulfill customer needs. Creating value and satisfaction are at the heart of

hospitality and travel industry marketing."[170]

The heritage tourism industry requires individuals who are able to understand the

"big picture" and willing to change to consumer needs through creative thinking strategies

based on sound marketing knowledge.[171] This can be difficult, as dealing with heritage

resources can be sometimes unpredictable in terms of funding sources and maintenance.

If conducted in an unplanned or uncoordinated way, the sales and marketing of cultural

heritage products can lead to problems, and many of these issues are due to the failure to

adopt a marketing management perspective rather than the "curator approach." In

marketing for cultural heritage tourism, efforts should be made to identify the core

product, the target market, the financial and nonfinancial (preservation) objectives, and a

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[168] Bowen, John T., James C. Makens, and Philip Kotler. <u>Marketing for Hospitality and Tourism, Fourth Edition.</u> Pearson Education, Inc., Upper Saddler River, NJ. Copyright 2006.
[169] *Ibid.*
[170] *Ibid*.
[171] *Ibid.*

plan of action.   Especially in a cultural heritage tourism context, marketing goals must

consider the needs of the host community, who may use the heritage assets differently than

the tourists. Since tourists and local residents share the asset, cultural heritage tourism

products should not compromise the needs of the residents.[172] Also, planners must realize

that only certain types of visitors are desirable and that it is impossible to market to every

tourist. For example, though both have many of the same assets, Myrtle Beach, South

Carolina markets to young adults and partiers while Hilton Head Island, South Carolina

focuses on more relaxed vacationers such as families and golfers.

Often there is a need with heritage attractions to de-market the asset to a certain

extent. Managers may need to reduce demand or transfer the demand between seasons if

the site is getting too popular and the heritage asset is at risk. Increased visitors may in

fact work against the goals of preservation, conservation, education, awareness, and

creating community pride. McKercher and du Cros use the example of Canterbury

Cathedral in England, which was seeing more tourists than the site could handle. Reverend

Canon Butt of Canterbury states, "Good marketing can be a useful means of selection [of

appropriate visitors] which can help with the problems of sustainability at high-profile

attractions." The marketing plan should be an integral part of the overall management

process.[173]

An effective marketing plan, however, can only be effective if it is based on sound

marketing research of that particular site or area. Before developing a marketing plan for a

cultural heritage tourism operation, marketing research should be conducted in order to

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[172] Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, (New York: Haworth Press, Inc., 2002). 203-204.
[173]Bob McKercher and Hillary du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management*, 2002. (Brett, 1999, p.84).

gather data on the "who," "what," "where," and the "why's" of the existing conditions of a heritage site or area.

Marketing research is the first step to developing a marketing plan for a cultural heritage tourism attraction, town, or region. A marketing plan should be developed with the data gathered from the marketing research in mind, targeting specific audiences and locations that are most beneficial to increasing (or decreasing in some cases where the site is experiencing too many visitors) the number of tourists.

Marketing plans can take on a variety of different efforts. Depending on the scale of cultural heritage tourism development, the response from the community, and the stakeholders involved, these efforts will vary.

Recommendations:

Marketing is essential to successful cultural heritage tourism operations. The type of marketing effort will vary from place to place, but efforts should include at least one of the following:

1. *Public Relations:* using media resources and press releases about upcoming events, educational tours, guest speakers, community awareness programs, and other products allow residents and visitors to know what is happening before they can participate.

2. *Advertising:* usually not as cost-effective as public relations but very effective. Placing ads in print or electronic media can be expensive, so you may want to consider cross marketing or "co-op" advertising to share the costs with another business or organization.

3. *Graphic Materials:* printed materials can include brochures, maps, guidebooks, directories, or signs.

4. *Promotions:* these can include festivals, special events, galas, sales missions, trade shows, or other creative promotions such as contests to draw interest to your attractions.

5. *Evaluation*: evaluating the effectiveness of your marketing strategy and addressing any areas that are not performing well will help ensure a quality tourism experience. [174]

Critical Success Factor 8: Creating Partnerships and Product Packaging

Creating partnerships is a critical success factor to cultural heritage tourism. At any level of a cultural heritage tourism initiative, partnerships aid in gaining financial support for the maintenance and preservation of heritage assets, the operation of tourism functions, community pride and support, and ensuring a quality experience that will make tourists want to return. Partnerships involve two or more parties exchanging some sort of benefit. Effective partnerships in cultural heritage tourism involve parties that can benefit from each other and promote each other equally. For example, a manager of a heritage site should invite restaurant owners, hotel operators, and members of the retail industry to the site and make them aware of what the heritage site can offer. The managers and operators should remember that while they may make a distinction between dining at a restaurant and going to a sporting event, the tourist does not. Instead, most tourists seek a total

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[174] "Share your Heritage, Getting Started in Cultural Corridor Development." http://www.culturalheritagetourism.org/resources/shareYourHeritage.htm. 2009.

experience that helps them to better understand a destination. Partnerships that involve

packaging can make this happen.[175]

There are three types of partnership and packaging opportunities in cultural

heritage tourism. The most common of these is to package cultural products of the "same

type" together because it is easy to accomplish. For example, this could be theaters

packaging with theaters and museums with other museums. Often, museums and historic

sites will use the "passport package" allowing tourists to visit all of the museums or historic

sites for a discounted rate. This can be effective, but it only appeals to a small percentage of

the visitors who are interested in visiting all of the museums in an area or all of the historic

sites in one area. The reality is that most visitors want a variety of experiences when they

visit a place.[176]

The second type of partnership and packaging is packaging cultural products of

different types. The advantage of this approach is that it increases appeal to a wider range

of people and reduces competition among the cultural products. This type of partnership

and packaging may include festivals and arts districts where a variety of cultural products

are available to the tourists.[177]

The third and most effective type of partnership and packaging is packaging cultural

and non-cultural tourism products together such as hotels, resorts, retail areas, sports and

outdoor recreation, bus tours, amusement parks, etc. This type offers a variety of

experiences that most tourists are seeking and greatly widens the market for cultural

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[175] Lord, Gail Dexter. "The Power of Cultural Tourism." Wisconsin Heritage Tourism
Conference, Lac du Flambeau, Wisconsin. 17 Sept 1999.
[176] Silberberg, Ted. "Cultural tourism and business opportunities for museums and
heritage sites." *Journal of Tourism Management.* Vol. 16, No. 5. Pp. 361-365. 1995.
[177] *Ibid.*

heritage products to be included in the experiences of those "accidental" cultural heritage tourists.[178]

Despite their potential advantages, there are often difficulties when it comes to developing partnerships for cultural heritage tourism. One potential issue is that involving diverse stakeholders in regular meetings is usually time consuming and complex.   Having many stakeholders can also slow the tourism development process, as stakeholders may not always agree. [179]

Partnerships will vary from place to place according to their duration, scale, geographic scale, legal basis, controlling parties, and their organization. Their geographic scale may be at a local, regional, state, or national scale. Their legal basis may be from a grassroots effort or from legislation. Partnerships may operate among government agencies, levels of administration, the private sector, and nonprofits.[180]

The following figure lists the phases of developing partnerships and the issues that arise at each phase.

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[178] Silberberg, Ted. "Cultural tourism and business opportunities for museums and heritage sites." *Journal of Tourism Management.* Vol. 16, No. 5. Pp. 361-365. 1995.
[179] Araujo, Lindemberg Medeiros de and Bramwell, Bill. "Partnership and regional Tourism in Brazil." *Annals of Tourism Research*, Vol. 29, No. 4, 2002. 1138-1164. www.elsevier.com/locate/atoures.
[180] *Ibid.*

Issue	Description
Phase 1: Problem-Setting	
Common Definition of Problem	The problem needs to be important enough to collaborate and must be common to several stakeholders.
Commitment to Collaborate	Stakeholders need to feel that collaborating will solve their own problem. Shared values are key.
Involvement of Stakeholders	An inclusive process that includes multiple stakeholders so the problem can be understood.
Legitimacy of Stakeholders	Not only expertise but also power relationships are important.
Leader's Characteristics	Collaborative leadership is key to success. Stakeholders need to perceive the leader as unbiased.
Identification of Resources	Funds from government or foundations may be needed for less well-off organizations.
Phase 2: Direction-Setting	
Establishing Ground Rules	Gives stakeholders a sense of fair process and equity of power.
Agenda-Setting	Stakeholders' different motivations for joining mean that establishing a common agenda may be difficult.
Organizing Subgroups	Large committees may need smaller working groups.
Joint Information Search	The joint search for information can help to understand other sides of the negotiation and to find a common basis for agreement.
Exploring of Options	Multiple interests mean that multiple options need to be considered.
Reaching Agreement	A commitment is needed to go ahead on a particular course of action.
Phase 3: Implementation	
Dealing with Constituencies	Stakeholders need to ensure their constituents understand the trade-offs and support the agreement.
Building External Support	Ensuring other organizations that implement are on side.
Structuring	Voluntary efforts can work, but a formal organization may be needed to coordinate long-term collaboration.
Monitoring the Agreement and Ensuring Compliance	This may involve more financial negotiations.

Figure 9: Gray's Framework of Issues and Phases in Partnership Development:[181]

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[181] Araujo, Lindemberg Medeiros de and Bramwell, Bill. "Partnership and regional Tourism in Brazil." *Annals of Tourism Research*, Vol. 29, No. 4, 2002. 1138-1164. www.elsevier.com/locate/atoures.

Recommendation:

Developing partnerships, networking, and developing effective tourism products are key to achieving long-term success in cultural heritage tourism. Developing partnerships takes time and effort, but knowing whom potential partners is is the first step of the process. Doing an inventory of the human assets up front should identify key partners. The SCNHC is a good example of successful partnerships that exist between individuals, organizations, state government officials, and the Federal government. (Refer to Case Study 1 in Chapter Four for more information).

Conclusions

Cultural heritage tourism is a broad and complex topic involving many factors, including heritage resources, local communities, tourism, economics, marketing, businesses, government agencies, and time. This thesis has examined the factors that contribute to cultural heritage tourism success through thorough research of academic literature and several case studies.   The eight critical success factors that contribute to this success range in scope and degree of formality among heritage tourism operations, as each heritage site or tourism effort is different and has its own unique characteristics and challenges. By no means are the eight factors discussed in this thesis the only contributing factors that determine the success of cultural heritage tourism operations. However, a recurring pattern of eight major critical success factors was found in many success stories encountered while developing this thesis. Therefore, it is encouraged that these eight factors be applied to cultural heritage tourism development operations, as these factors will aid in their success.

EXECUTIVE SUMMARY

Critical Success Factors for Heritage Tourism Development:

1. **Assessment of Cultural Heritage Tourism Potential:** *conduct an inventory of all heritage and human assets; discover what will bring tourists to a place and the resources to make it happen.*

2. **Establishment of Clear Goals and Objectives***: determine the expectations, objectives, and goals of a community through discussions and public meetings; clear goals and objectives must be established in order to start the strategic planning process.*

3. **Strategic Planning***: a critical stage of cultural heritage tourism development, strategic planning must include short-term and long-term tourism planning that will meet the needs of the residents and the tourists while helping to maintain the integrity of a site or location both historically and culturally, and remain sensitive to the natural environment.*

4. **Management and Preservation of Heritage Assets:** *management planning for historic sites and natural attractions should take place in order to protect heritage assets for future generations without becoming too curatorial and ignore sound business approaches. Interpretation of heritage assets should be included in the management of heritage attractions.*

5. **Preparation for Tourism***: a site, community, or region should prepare for tourism on all levels, including hospitality development, food services, adequate utilities and*

infrastructure, public services such as police and fire safety, zoning for historic resource protection, etc. This process is usually ongoing and completed in stages.

6. **Maintaining Authenticity:** *throughout the initial planning process and through the development of cultural heritage tourism, an effort should be made to maintain authenticity, or "sense of place." This factor is what makes a destination unique and keeps visitors coming. Studies have shown that authentic and entertaining experiences are what make for successful cultural heritage tourism programs. Authenticity may exist physically or through interpretation.*

7. **Effective Marketing:** *adopting an effective marketing strategy is essential in attracting and competing for tourists. There are many ways to accomplish this, and examples of these are discussed in the SCNHC case study and Chapter Five.*

8. **Creating Partnerships and Product Packaging:** *for long-term success and financial resources, creating partnerships is essential. Developing different types of "tourism products" or experiences is also important, along with packaging these products in such a way to maximize economic potential.*

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