



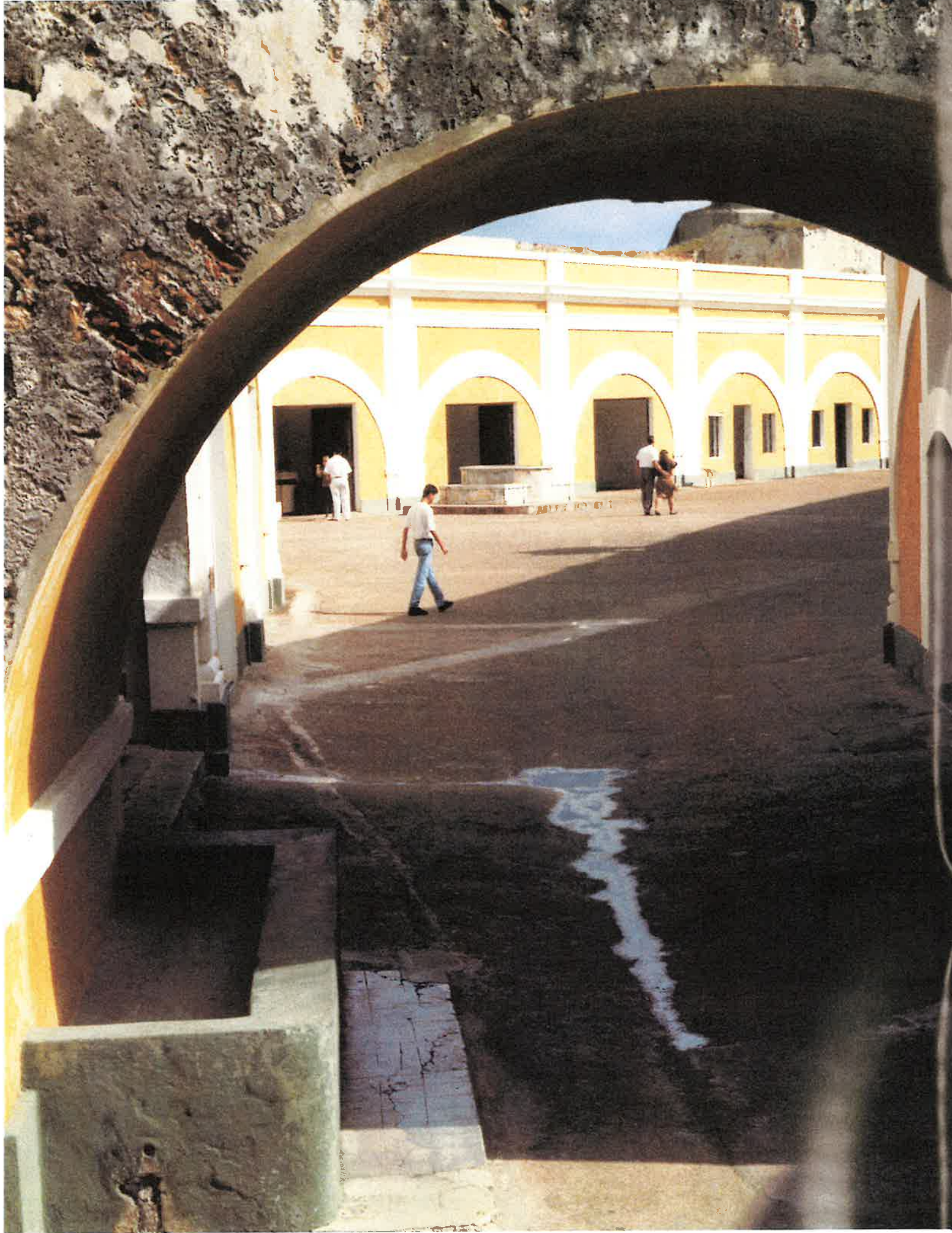
EXPLORING AMERICA THROUGH ITS CULTURE

by
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in cooperation with the Japanese American National Museum
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Cover photo: "TEXAS" musical drama, Canyon, Texas. Photo courtesy of the Institute of Outdoor Drama.



INTRODUCTION

America's cultural organizations and the travel and tourism industry are forging an effective partnership that contributes substantially to the growth of our economy. The breadth, scope, and vitality of this collaboration — and above all, its potential for future expansion — are not as well understood, or capitalized upon, as they should be.

For that reason the President's Committee decided to commission *Exploring America Through Its Culture*. Our report is intended to call attention to the economic significance of this partnership and to suggest ways it can be strengthened. In preparing this report we found that:

- the United States possesses unique historical and cultural resources that lend themselves to cultural tourism and that are of particular interest to international visitors;
- cultural tourism has a significant economic impact in many communities throughout the United States, documented in numerous studies;
- cultural tourists tend to stay longer and spend more at their destinations;
- collaboration among the cultural sector, the travel and tourism industry, and governments at all levels is necessary if this sector of the economy is to reach its full potential in the years ahead.

This report summarizes the best recent research — all of the studies cited have been conducted in the last three years — and identifies some of the best practices in cultural tourism today. By issuing this report we hope to increase public understanding of the benefits of cultural tourism and provide recommendations that will enhance and expand cultural tourism in the United States.

We conclude that there should be more research on cultural tourism at the national, regional, state, and local levels; that emphasis should be placed on better product development; and that the industry needs more and better promotion, especially to international visitors.

Throughout the report we have incorporated the recommendations of a working group on cultural tourism composed of President's Committee members Susan Barnes-Gelt, Everett Fly, Diane Frankel, Bill Ivey, Roger Kennedy, Emily Malino, and Dave Warren. We want to extend a special thanks to this group for the valuable expertise and oversight they have brought to the entire project; they have contributed many hours to this venture, and like all members of the Committee, serve without pay.

John Brademas
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*El Morro,
San Juan,
Puerto Rico.
Photo: Daniel
Sheehy.*



EXPLORING AMERICA

Through Its Culture

America's cultural resources offer domestic and international travelers the opportunity to experience what is uniquely American: our regional differences and ethnic character, our history and our most contemporary expressions.

A cultural tourist is motivated entirely or in part by artistic, heritage or historical offerings. Exciting discoveries can be made in different regions and communities in urban, suburban, rural and resort settings. The cultural tourist visits art exhibitions and galleries, theaters, museums, festivals and fairs, historic sites and monuments, folklife and craft centers, downtowns and ethnic neighborhoods, architectural and archeological treasures and national and state parks.

The country's mosaic of cultural sites, traditions and art forms can be experienced when travelers visit the seven German communal villages of the Amana Colonies in Iowa; attend San Antonio's Conjunto Festival; explore the new San Francisco Museum of Modern Art; visit the Martin Luther King historic site in the Sweet Auburn neighborhood of Atlanta; purchase traditional sweetgrass baskets in South Carolina; enjoy Broadway musicals in New York, country music in Nashville and popular music at the Rock and Roll Hall of Fame and Museum in Cleveland; or tour Frank Lloyd Wright's architectural masterpieces in Wisconsin, Illinois, Arizona and Pennsylvania. These and many other

opportunities demonstrate that the United States has much to offer visitors that is authentic, of quality and uniquely ours.



A performance by Los Pregoneros del Puerto during a national tour of Mexican-American music sponsored by the National Council for the Traditional Arts.

Photo: Daniel Sheehy.

Fireworks at "TEXAS," Canyon, Texas. Photo courtesy of the Institute of Outdoor Drama.

ECONOMIC IMPACT

Cultural tourism has a significant economic impact, documented by studies conducted throughout the country. It brings new dollars to communities and regions through expenditures by visitors who do not reside in the local economic trade area, and it stimulates increased tax receipts. Cultural tourism can also generate revenue during periods of the year when business is soft.

Cultural tourism is a major sector of America's travel and tourism industry. In 1994 the travel and tourism industry generated an estimated \$416 billion in expenditures in the United States. International visitors spent \$78 billion, creating a \$22 billion surplus as international visitors spent more money in the United States than Americans spent abroad. Travel and tourism is the nation's second largest industry in terms of employment (behind health services) with 6.2 million direct jobs and a payroll of nearly \$103 billion. The industry contributed \$56 billion in tax revenue for local, state and federal governments. (Source: Travel Industry Association.)

The following examples provide findings from selected research studies which measured the economic impact of cultural tourism.

- **CALIFORNIA.** During 1993, 2.3 million visitors included the arts in their itineraries. These cultural tourists spent \$45 million on accommodations and \$243 million on in-state transportation, generating \$158 million in income and creating 4,200 jobs. Among overnight visitors who responded to the survey, some 80% indicated that the arts event was an important element in their decision to visit the area. (1994 study: *The Arts: A Competitive Advantage for California* prepared by Policy Economics Group, KPMG Peat Marwick, Washington, D.C.)
- **COWBOY POETRY GATHERING, ELKO, NEVADA.** A 1992 economic impact survey demonstrated that \$2.9 million in direct expenditures occurred because of the five day festival held in mid-winter, the slowest economic time of the year for the community. \$2.5 million was attributable to out-of-state visitors. 21 local businesses reported aggregate sales increases of 37% during the week of the Cowboy Poetry Gathering.
- **NEW YORK/NEW JERSEY METROPOLITAN REGION.** \$2.3 billion in economic activity was generated in 1992 by visitors who came to the region primarily for its cultural offerings or extended their stays because of them. This represents a 13% increase over 1982. 15% of the cultural tourists were international visitors, a 72% increase over a decade ago. Arts-motivated visitors averaged a 2.9-day stay, one day more than a decade ago, and spent \$400 per stay, twice as much per trip compared with a decade ago. (1993 study: *The Arts as an Industry: Their Economic Importance to the New York - New Jersey Metropolitan Region* conducted by The Port Authority of New York & New Jersey in partnership with the Alliance for the Arts, New York City Partnership and Partnership for New Jersey.)
- **ZORA NEALE HURSTON FESTIVAL OF THE ARTS AND HUMANITIES, EATONVILLE, FLORIDA.** A sampling of travel parties during the 1995 festival indicated that 42% of the festival audience traveled to the event from outside the local region. Estimated festival attendance was 30,000 and the average number of people in each travel party was 3.5. The study conservatively estimated that approximately \$390,000 was spent by out-of-region festival patrons, creating significant economic benefit in Orange, Seminole and Osceola counties. The three primary expenditure areas were the festival, hotels and restaurants. This festival celebrates Zora Neale Hurston (1891 - 1960), home town writer and pioneering collector and interpreter of southern rural African-American culture, and Eatonville, the first town in the United States incorporated by African-Americans.
- **ILLINOIS.** 3.1 million out-of-state visitors included the arts in their Illinois itineraries in 1994, generating \$181 million in total output. Interviews of out-of-state patrons at nine Chicago museums determined that cultural institutions and events were the primary reason that 17% traveled to Chicago. Another 37% indicated that these factors definitely affected their decisions to come to the city. (1995 study: *Economic Impact of the Not-For-Profit Arts Industry in Illinois*, conducted by Coopers & Lybrand, L.L.P for the Illinois Arts Alliance.)

■ **SANTA FE INDIAN MARKET, SANTA FE, NEW MEXICO.** Each year the Santa Fe Indian Market, one of the most important venues for the sale of Native American art works, attracts up to 100,000 visitors. A survey conducted in 1993 for the Southwestern Association for Indian Arts estimated that the Market adds \$110 million to the Santa Fe area economy. The average visitor, according to the survey, stays in the area for six days and spends an average of \$734 on Indian arts and crafts. (1993 study conducted by Southwest Planning and Marketing for the Southwestern Association for Indian Arts.)

■ **MONTEREY JAZZ FESTIVAL, MONTEREY, CALIFORNIA.** On average the 39,000 attendees at the world's oldest jazz festival spent \$330 per person in conjunction with the festival. The four largest components of this spending were \$84.20 on lodging, \$77.40 on tickets, \$36.40 on food and drinks before or after the festival events and \$25 on refreshments while at the festival. The 70% of festival patrons from outside Monterey spent an average of 2,9 nights in the area. 77% stayed in hotels, motels or bed & breakfasts; 5% stayed in rental homes or condos; 2% stayed at campgrounds; all spending an average of \$121 per person on lodging. (1994 study: *The Arts: A Competitive Advantage for California* prepared by Policy Economics Group, KPMG Peat Marwick, Washington, D.C.)

■ **AGE OF RUBENS EXHIBITION, TOLEDO MUSEUM OF ART, TOLEDO, OHIO.** In 1994 a major traveling exhibition, *The Age of Rubens*, attracted the largest attendance in the museum's history. During its three month stay the exhibition generated more than \$7.6 million in direct spending for the Toledo metropolitan area. Exit interviews revealed that 88% of the out-of-town visitors traveled to Toledo primarily to see the exhibit. Visitors spent an estimated \$2 million on food, \$242,000 in lodging, and \$508,000 on transportation. (Source: 1994 study conducted by James A. Brunner for the Greater Toledo Office of Tourism and Conventions.)

■ **HISTORIC SITES AND BATTLEFIELDS.** Historic sites, including Civil War battlefields, are among the most popular destinations for both American and



foreign tourists. In 1993 American battlefields drew almost 10 million visitors, with approximately 1.2 million visitors touring Gettysburg. Visitors to Pea Ridge National Military Park, a Civil War site in Arkansas, spent \$10.8 million dollars there in 1991; Historic Fredericksburg contributed \$893,000 in sales tax revenue alone to the local economy in one year. (1994 study: *Dollars and Sense of Battlefield Preservation: The Economic Benefits of Protecting Civil War Battlefields*, by the Conservation Fund and the National Trust for Historic Preservation, Washington, D.C.)

■ **OUTDOOR HISTORICAL DRAMAS IN THE UNITED STATES.** According to the Institute of Outdoor Drama, paid attendance at outdoor dramas and pageants during 1993 was estimated at 3 million people, a 4% increase over 1992, despite decreases at some locations due to the flood disaster in the Midwest. The Institute estimated that the overall economic impact of outdoor dramas was \$500 million.

Historic Fort Loudon near Vonore, Tennessee is the site of several reenactments throughout the year. Photo: Tennessee Overhill Association.

Nonprofit arts organizations, one component of cultural tourism, have a significant economic impact. Altogether, from 1990 to 1992, these organizations' average expenditures totaled \$36.8 billion and supported 1.3 million jobs. The industry contributed nearly \$5.4 billion in local, state and federal tax revenue. (1994 study: *Arts in the Local Economy*, National Assembly of Local Arts Agencies.)

International visitors are also cultural tourists. These visitors have a significant impact on destinations and cultural institutions throughout the United States.

TOP 15 LEISURE/RECREATIONAL ACTIVITIES FOR INBOUND INTERNATIONAL TRAVELERS

January - December 1994

Shopping	84%
Dining in Restaurants	69%
Sightseeing in Cities	64%
Sunbathing/Water Sports	35%
Visiting Historical Places	30%
Visiting Amusement/Theme Parks	27%
Visiting National Parks	23%
Visiting Museums/Art Galleries	23%
Touring the Countryside	22%
Taking Guided Tours	20%
Dancing/Nightclubs	16%
Attending Concerts, Plays	16%
Gambling/Casinos	14%
Playing Golf/Tennis	11%
Attending Sports Events	9%

Source: 1994 In-Flight Survey of International Air Travelers, United States Travel & Tourism Administration.

THE CULTURAL TOURIST

Today's travelers are noted for their individual interests and expectations. This trend toward individuality means smart marketers will customize their marketing to meet the needs of their audience. It also underscores the importance of developing and enhancing cultural tourism products to meet the needs of current and prospective customers.

Meeting the needs of cultural tourists is particularly important because, according to the National Trust for Historic Preservation, travelers who include historic sites in their itineraries stay an average of a half-day longer and spend an average of \$62 more than other travelers. In addition, a number of state and local studies indicate that cultural tourists can be distinguished from other tourists by the following characteristics:

- higher income level
- higher level of education
- longer trip duration
- greater likelihood of staying in hotels
- more interest in shopping

Domestic travelers who plan to visit historic sites or participate in cultural activities such as concerts, theater, and ethnic or heritage festivals, travel primarily for personal entertainment or enjoyment. In addition, they travel to educate children. Sometimes they travel to investigate a place they have heard about or to experience something they feel is uniquely American.

Visiting historical places and attending cultural events are two of the five most popular activities planned by 1995 summer vacation travelers (other popular activities include going to the beach or lake, visiting friends or relatives and visiting a city). Visits to historic sites and attending cultural events placed ahead of fishing, gambling in casinos, visiting theme parks and resorts, and going on cruises. (Source: *Travelometer*, a quarterly study of travel intentions, conducted by the United States Travel Data Center, the research department of the Travel Industry Association.)

SUCCESSFUL CULTURAL TOURISM

PARTNERSHIPS AND COLLABORATION The key to success in cultural tourism is collaboration and, over time, the creation of ongoing, profitable partnerships. Developing partnerships is not always easy because divergent interests are often at play and consensus building can be time-consuming.

The road to achieving successful cultural tourism requires that the participants respect one another's priorities, speak one another's language and understand how each other's business works. All partners must make a solid investment in the cooperative program. Occasionally this can be an in-kind contribution, but more often than not it is a financial investment.

Key areas for cultural tourism collaboration are:

- Product Development
- Marketing
- Visitor Service
- Research
- Financing

Designing mutually beneficial plans and programs means first identifying potential public and private sector partners. For example, it is important for cultural tourism partners to collaborate with urban, rural, regional and tribal planning agencies and the private sector to see that cultural tourism issues and priorities are addressed in the comprehensive planning process.

Other partnerships can begin when a state travel office, convention and visitors bureau, chamber of commerce or tourism organization explores mutual priorities with a state or local arts council, a state humanities council, a state preservation office or with local preservation groups. Partnerships can also begin with individual cultural tourism businesses and organizations. For example, a potential partnership might be initiated when a theater explores the feasibility of cooperatively marketing before or after theater dining with nearby restaurants, or a hotel works to ally itself with a museum to create packages for a special exhibition. Partnership opportunities may also be created when the owner of several historic

*Crowd at the
Cowboy Poetry
Gathering,
Elko, Nevada.
Photo: Sue Rosoff,
Western Folklife
Center*



THEMATIC PRODUCTS:

The Illinois & Michigan Canal Heritage Corridor

The Illinois & Michigan Canal, once a bustling industrial waterway, is bustling once again as a 120 mile corridor connecting the diverse cultural and natural resources of urban, suburban and rural Illinois, from Chicago to LaSalle-Peru. Here modern explorers can travel thematically, experiencing early settlement patterns, transportation history, geological and archaeological history. Four corridor attractions were among Illinois' top 15 most-visited places. Two reflect canal era character, the landscape and Native American heritage — Starved Rock State Park and the Illinois & Michigan Canal State Trail — and two are riverboat gambling sites — the Empress River Casino and Harrah's Casino, both in Joliet.

The nation's first heritage corridor demonstrated, in only ten years, how public-private sector partnerships can achieve solid economic benefits, strengthen communities, develop and enhance products, provide lively interpretation through the arts, humanities and re-enactments and establish a foundation for tourism growth. The primary partners, the Canal Corridor Association, the Canal Corridor Commission and the Heritage Corridor Convention & Visitors Bureau, in cooperation with others, have achieved notable results:

- \$130 million in local, state and private funds invested in cultural resources preservation, restoration and rehabilitation and park, trail and waterway development. \$20 million in U.S. Department of Transportation (ISTEA) funds, matched by \$5 million in local investment, financed a substantial portion of an 80 mile trail system, downtown streetscapes and rehabilitation of historic resources like locks, aqueducts, bridges, locktenders' houses and industrial heritage sites such as the Pullman Clocktower Building where the Pullman rail car was manufactured.
- The first regional Main Street program in cooperation with the National Trust for Historic Preservation in the communities of Lemont, Ottawa and Lockport generated \$9.5 million in investment, a net gain of 51 businesses and 150 full time jobs.
- A public artwork celebrating the entry point to the I & M Heritage Corridor will be placed in Gateway Park at Navy Pier, Chicago's recently restored landmark attraction and exposition facility. The work was funded by the John D. and Catherine T. MacArthur Foundation, Sara Lee Corporation and the Metropolitan Pier and Exposition Authority.
- A book created to foster appreciation of the I & M Canal by internationally recognized photographer Edward Ranney and best selling author William Least Heat-Moon was funded by the Illinois Humanities Council and the Graham Foundation. The project will culminate in a major exhibit during 1997 at the Chicago Cultural Center, one of the most comprehensive free showplaces for the arts in country.

commercial buildings in a downtown business district decides to restore them as an arts center and retail space that ultimately can be an attractive cultural tourism product marketed by the local or regional tourism promotion organization.

It is no longer smart — and it's often impossible — to go it alone.

Partnerships can:

- create financing opportunities
- maximize marketing dollars
- create access to new marketable products
- enhance or develop products and destinations
- open new markets and expand customer base
- build awareness and recognition
- open distribution points
- build repeat business
- generate peak, off peak and shoulder season business
- increase sales

CULTURAL TOURISM ASSESSMENTS The range of cultural products and experiences available in the United States is enormous. However, whether products and experiences should be a part of, or are appropriate for, cultural tourism requires careful consideration and honest evaluation.

Some sites and communities cannot handle increased visitorship, while others are actively seeking more visitors and thus increased revenue. Certain experiences, places and products have immediate cultural tourism potential. Others will require investment and enhancement before they can meet the expectations of visitors. Some may be ceremonially sensitive places, such as Pueblo plazas, or other special places that should be protected for the benefit of local residents and not marketed to visitors at all. There are also places and products that have local appeal, but are not appropriate for tourism.

A community or regional assessment can play a valuable role in developing a realistic understanding of cultural tourism potential. It is a way for communities and regions, as well as organizations and institutions, to determine where, or whether, they fit in cultural tourism or how to further strengthen and build cultural tourism. Such an assessment can form a strong foundation for developing and enhancing cultural tourism that is appropriate to that specific place.

The assessment process often begins with a site inspection tour. To be most effective this tour should be done independently and should parallel the visitor's experience, making recommendations from the visitor's point of view.

Some of the critical elements for assessment and planning are:

- **ACCESSIBILITY** — Directional and wayfinding signage, ease of traveling to and within the destination or site and readiness for disabled travelers.
- **VALUE** — Current and longer term significance, authenticity, quality of interpretation, performance or presentation, activities for visitors, and need for restoration, renovation or enhancement.
- **VISITOR SERVICE** — Quality and availability of information in advance and during a visit, ease of purchasing tickets or admissions, services and amenities for the visitor such as multi-lingual information, automated teller machines, rest rooms, etc.
- **SETTING, SCENIC VALUE AND APPEARANCE** — Quality of maintenance and landscaping, enhancement of the visual appeal of destinations, gateways to communities, individual sites and buildings and protection and enhancement of scenic routes.
- **INFRASTRUCTURE** — Availability, quality and diversity of food, lodging, retail establishments and transportation.

An assessment will help a community or region decide whether cultural tourism is a good economic development strategy for it to pursue. A good assessment will recommend how cultural tourism can be enhanced and what resources will be needed.

DEFINING THE PRODUCT Cultural tourism is a mosaic of places, traditions, art forms, celebrations and experiences that portrays America and its people and reflects the diversity and character of the United States. The range of cultural tourism products that are ready to welcome visitors now, and those that with

GEOGRAPHIC PRODUCTS:

Tennessee Overhill

additional work and investment will be in the future, is quite extensive. They may be historic, representative of the recent past, or contemporary expressions of our culture.

Cultural tourism products can be a collection of sites and experiences that reflect a geographic area or combine destinations to focus on a specific theme like Civil War sites or Route 66. They may also be extraordinary singular sites like the Mount Rushmore National Memorial in South Dakota, Taos Pueblo in New Mexico or events such as the Spoleto Festival in Charleston, South Carolina and the Aspen Music Festival in Colorado.

The pieces of the mosaic that can be transformed into the cultural products marketed to visitors from our own country and abroad are illustrated by the examples that follow. These pieces may link together in a variety of ways to satisfy the expectations of customers. Sometimes groupings of sites and activities create products that cross state lines to link destinations thematically. For example, St. Louis and New Orleans are jointly promoting "America's Music Corridor," and Memphis and the State of Mississippi are marketing "America's Blues Alley" in Europe.

A grouping of products linked by geography can form the nucleus of a cultural tourism destination that is attractive to new and repeat customers. Geographic linkages strengthen tourism by combining resources and providing an opportunity for quality cultural sites, celebrations and experiences to be identified as integral parts of a major destination. This is important because most individual sites cannot stand on their own in the highly competitive tourism arena.

Finally, products can be enhanced by the quality of interpretation at the site. Historic and cultural attractions are part of our national heritage. The interpretive materials they present must be of high quality, providing accurate information in engaging and memorable ways. Interpretive strategies range from simply providing brochures with background information to offering exhibits with wall panels and object labels that explain historical and cultural contexts; or offering live interpreters or guides who tell visitors more about the site or event.

CULTURAL TOURISM MARKETING In the best cooperative programs the marketing mix begins with the customer's needs and works to build long term customer relationships. Because today's customers are not all alike, savvy marketers must recognize the special needs of diverse consumers and focus on market segments that will generate the greatest return on investment.

In the broadest sense the travel industry markets to international and domestic consumers (business travelers, pleasure travelers and travelers who combine both) and the travel trade (tour operators, wholesalers, travel agents, incentive travel planners, meeting and convention planners and trade show managers).

Most profitable cultural tourism programs begin with a good marketing plan and a comprehensive budget. The marketing plan provides an orderly and businesslike approach to bringing buyers and sellers together. The plan also keeps all parties focused on what is important and balances the demands of various interest groups, so they keep the long-term perspective that is needed to build cultural tourism.



Tennessee basketmaker.

Photo: Tennessee Overhill Association.

Just 100 miles north of Chattanooga travelers can discover the Tennessee Overhill, an exceptional, culturally diverse geographic area. This rural region is aptly named for it was the site of Cherokee towns located on the western slopes of the Appalachian Mountains, "overhill" from the lower Cherokee settlements.

The Tennessee Tourism Department joined with the National Trust for Historic Preservation and the newly created Tennessee Overhill Heritage Tourism Association to create a three year pilot heritage tourism program, funded in part by a grant from the National Endowment for the Arts. The goal was to develop a sustainable, locally controlled, cultural tourism program. Aggressive local leadership forged partnerships, created a strong tourism organization, secured financing and laid the ground work for on-going product development and marketing initiatives. Success is evidenced by:

- Support from funding and program partners like the National Resource Conservation and Development Council; Southeast Tennessee Development District; East Tennessee Foundation; Tennessee Arts Commission; Tennessee Humanities Council; University of Tennessee; McMinn, Monroe and Polk Counties; and the towns of Etowah, Englewood and Ducktown.
- Development of a multi-year marketing plan funded by the U.S. Forest Service. Initiated activities including travel writers' tours, familiarization tours and production and distribution of a photographers' guide and a visitors' guide covering rivers, museums, scenic drives, the arts, special events, the Cherokee National Forest, special places, dining, lodging, information contacts and a map and installation of new signage to welcome visitors at the ten entry points to the region.
- Hospitality training and target marketing in preparation for the 1996 Summer Olympic Whitewater Competition which will be held on the region's Ocoee River.
- Effective product development leadership that lead to creation of a Textile Museum in Englewood which was awarded the 1995 Tennessee Association of Museums Award for Excellence for small museums; hiring a folklorist to work with museums and special places to improve interpretation and programming to better express the cultural identity and arts of the area; launching a fundraising campaign to restore the Gem Theater in Etowah; and originating a profitable special event, the Bald Mountain Loop Railroad Excursion.

Successful cultural tourism marketing is not just producing a brochure. Marketing activities can include:

- advertising
- public relations/media relations
- promotions and sponsorships
- packaging (creating fixed price saleable products offering a mix of elements like cultural activities, historic sites, restaurants, accommodations)
- travel industry sales (selling to the travel trade through direct sales, international and domestic sales missions and trade shows)
- familiarization tours (tours designed to acquaint the travel trade with a specific destination)
- direct response marketing
- marketing support materials
- electronic communications (capitalizing on new technology like the Internet, commercial on-line services, CD ROM, fax and e-mail)

Cultural tourism marketing activities are beginning to flourish throughout the country as both cultural organizations and the travel industry recognize the economic benefits and the value of partnerships in building this business.



Children in the gardens of Brucemore, a historic site owned by the National Trust for Historic Preservation. Cedar Rapids, Iowa. Photo: National Trust for Historic Preservation.

"AMANA FOR KIDS"

Amana Colonies, Iowa

The Amana Heritage Society created "Amana for Kids" during the summer of 1994 to provide activities for a key audience targeted by the Amana Colonies Convention & Visitors Bureau — the regional family traveler. A scavenger hunt made it fun to explore the seven distinctive German villages that comprise the Amana Colonies by following clues that lead to museums, artisans, restaurants and merchants in each village. During only six weeks more than 1000 children completed the scavenger hunt and picked up their prizes at the Museum of Amana History. Special workshops added to the fun. The program was promoted to visitors at the Amana Colonies Visitors Centers on Interstate 80 and in Amana through participating businesses and organizations. Partners included the Amana Heritage Society, The Amana Colonies Convention & Visitors Bureau, The Amana Society, Inc. and the Iowa Community Cultural Grant Program.

MONET EXHIBITION PACKAGES & ON-LINE MARKETING

San Francisco, California

The San Francisco cultural tourism program was a catalyst to the city's first extensive effort to package hotels and a major exhibition — *Monet: Late Paintings of Giverny* at the M.H. de Young Memorial Museum. Within eight weeks all available packages were sold, resulting in the sale of 847 room nights and 1000 exhibit tickets. Both consumers and the travel trade want more cultural packages in the future. San Francisco promoted the packages and other cultural offerings through TravelFile, a destination information service available to travel agents who use SABRE, Galileo International, Galileo Canada and Worldspan reservation systems. Cultural information is also available to the general public through EAASY SABRE.

MARYLAND TOURISM DEVELOPMENT BOARD & BALTIMORE SYMPHONY

Baltimore, Maryland

The Maryland Tourism Development Board and TravelersGroup are sponsoring a 13 week series of Baltimore Symphony Orchestra concerts on public radio during the fall of 1995. These concerts will air on 180 radio stations in 42 states. The sponsorship agreement calls for music director David Zinman to incorporate a special cultural tourism promotional announcement during the intermission of each performance. In each announcement Zinman will mention that the symphony is part of a collective of fine cultural institutions, highlight Maryland as a cultural destination, and feature a variety of cultural institutions and activities. A 1-800 tag line will allow listeners to call for Maryland travel information.

MEMPHIS CULTURAL TOURISM ADVERTISING PROGRAM

Memphis, Tennessee

The Memphis Convention & Visitors Bureau's 1995 travel campaign markets Memphis as an incomparable cultural tourism destination. A series of 60 second radio spots are running for a month in the Chicago market on key African-American stations. The spots feature music that is uniquely American, the National Civil Rights Museum, the places where Alex Haley researched his roots, and laud Memphis as the city where black radio first signed on the air. The spokesperson who invites visitors to come to Memphis is Dr. W.W. Herenton, the first African-American mayor of Memphis. This campaign is reinforced by cable television spots directed toward a broader audience, with a spot that features Beale Street and the Blues, Elvis and Graceland, and the Civil Rights Museum. The campaign is a cooperative advertising program funded by the CVB with support from the Tennessee Department of Tourism.

CULTURAL TOURISM MARKETING STAFF

San Francisco, Los Angeles and New Orleans

For the past five years the San Francisco Convention and Visitors Bureau, in partnership with the Grants for the Arts Program of the San Francisco Hotel Tax Fund, has operated a cultural tourism department with a full-time cultural tourism manager, the first such position in a convention and tourism bureau in the country. The program's purpose is to introduce visitors to San Francisco's cultural community and in so doing increase hotel occupancies, attendance at arts events, and cultural tourism revenues in the city. Recently both New Orleans and Los Angeles have initiated similar positions and programs developed jointly by the tourism and cultural industries.

SOUTHERN ILLINOIS ARTS AND CRAFTS MARKETPLACE

Rend Lake, Illinois

The Southern Illinois Arts and Crafts Marketplace, a component of the Illinois Artisans program of the Illinois State Museum, showcases and markets the works of approximately 600 southern Illinois artists. The dramatic 17,000 square foot facility in rural Illinois houses an Illinois Artisans Shop and gallery space for changing exhibits. It also is home to the Southern Illinois Tourism Council, the regional tourism promotion council. The Marketplace is located near the Rend Lake recreation and resort complex on I-57, a major interstate linking Chicago to southern Illinois and Memphis, Tennessee. Research indicates that the Marketplace attracts over 80,000 annual visitors and has an economic impact of \$1 million. The Illinois Artisans Program also operates Illinois Artisan Shops in Chicago in the James R. Thompson Building (State of Illinois Building) and in Springfield at the Lincoln Home National Historic Site.

VISITOR SERVICE Success in cultural tourism requires more than quality products and marketing. Visitor service, a term used by the travel industry to include both amenities and information, is essential to attract new and repeat cultural tourism customers. Both the cultural and tourism industries need to work with their communities and regions to make sure the area is truly ready to welcome both international and domestic visitors. Factors to include range from how visitors are welcomed, to well signed, accessible sites and facilities; convenient ticket and admissions policies; knowledgeable staff who know their product and can refer visitors to other attractions and restaurants or secure a cab for customers after an evening performance.

Visitor information centers can be extraordinary showcases for cultural tourism products and possible sales outlets for joint admission tickets. Another way to increase visitor service is to collaborate on hospitality and "product knowledge" training programs for front line employees at information centers, cultural attractions and accommodations. Such programs can transform front line personnel into expert salespeople who become an actual point of sales for cultural



*Southern Illinois
Arts & Crafts Marketplace.*

*Photo: Southern Illinois
Arts & Crafts Marketplace.*

products such as museum passes, architectural tours and hotel packages and who also serve as a referral service to a convenient sales outlet, such as day of performance ticket booths.

DAY OF PERFORMANCE TICKET BOOTHS

Austin's Austix, Boston's Bostix, Chicago's HOT TIX, Denver's Ticket Bus, New York's TKTS, San Diego's Arts Tix, San Francisco's TIX Bay Area, Seattle's Ticket and Washington, DC's Ticketplace are conveniently located ticket offices that offer theater and performing arts tickets, often at reduced rates on the day of performance. The ticket booths are popular with both visitors and residents.

DIRECTION PHILADELPHIA — VISIBLE • UNDERSTANDABLE • ACCESSIBLE

This innovative signage program makes Philadelphia far more "visitor friendly." Civic leaders became convinced that the image and economic vitality of the city was tied to the experience people had getting to, and traveling within, the city. The project is an asset to pedestrians and motorists, and to metropolitan area residents and visitors alike. It provides directional signage, identifies attractions and links neighborhoods and districts. Federal Highway Administration (ISTEA) funds have supported the fabrication and installation of 250 signs to date. Maintenance costs are paid by participating institutions based on the number of times the institution is mentioned in signage. A *Program Description and Graphic Standards Manual* addresses management and administration, financing strategy, policies and procedures, maintenance and graphic standards. *Direction Philadelphia* was initiated by the Foundation for Architecture and planning was funded with a multi-year grant from the William Penn Foundation. A steering committee of individuals and organizations with a stake in Philadelphia's directional signage issues worked with the foundation and its consultants.

SHOWCASING LOCAL CRAFTS AT NORTH CAROLINA & SOUTH CAROLINA WELCOME CENTERS

The North Carolina Welcome Center at I-26 Northbound is furnished with the work of local artisans. The furniture was commissioned by, and is owned by, the state of North Carolina. Travelers can learn more about the artists and their work by reviewing the background information in notebooks placed throughout the center.

The South Carolina Welcome Center at I-95 Northbound-Hardeeville (just across the state line from Savannah, Georgia) was redesigned to make it a more effective sales center for South Carolina destinations and a center that reflects the state's rich cultural heritage. Fine South Carolina baskets are artfully displayed and interpreted. Travel counselor training includes education about the artists and their work.

"ART," THE CULTURAL BUS, PORTLAND, OREGON

"Art" is a forty foot Tri-Met bus that makes traveling to Portland's cultural and tourism sites more convenient for visitors and residents. The bus was decorated inside and out with an artist's mural. Information on cultural sites that are accessible via the Tri-Met transit system is available on-board. The new cultural bus route stops at key sites including the Portland Art Museum, the Oregon History Center, the Oregon Convention Center, the Portland Center for the Performing Arts, the Zoo and the Portland Oregon Visitors Association's Visitor Center. The cultural bus concept was developed by the Regional Arts & Culture Council. Project partners included the Northwest Business Committee for the Arts, which enlisted corporate sponsors; Tri-Met (regional transit authority), which provided the bus, staff support and introduced an appropriate route; and METRO (regional government), which funded a regional tour to community events throughout the region.

*Matinee line
at Theatre
Development
Fund's TKTS
Booth in
Duffy Square,
New York City.
Photo: David LeSbay,
Theatre Development
Fund.*



CULTURAL TOURISM RESEARCH The importance of research to successful cultural tourism cannot be over-emphasized.

Some significant research is available, but more is needed. This should be a priority for every entity pursuing cultural tourism. An investment in research is necessary to:

- understand consumers, their characteristics and what motivates them to travel
- identify emerging markets and changes in market demand and potential
- determine customer satisfaction
- reveal travelers' spending patterns
- provide economic impact data
- evaluate program effectiveness

A cultural tourism program plan should budget for research, even if only limited resources are available.

To build a successful program both the cultural and travel industries need to study the attributes of the cultural traveler, as distinct from other tourists. Ultimately, research will be needed to gauge the economic impact of cultural tourism, and tourism partners will need to decide how to implement a research program. Research instruments must be designed and utilized to meet the needs of both industries. All parties will want the hard data and also clear interpretation that tells what the numbers actually mean.

Cultural tourism research methods include: entry and exit surveys at special events, museums, historic and heritage sites and performing art venues; surveys at airports, welcome centers and other transportation-related locations; surveys of guests at accommodations; and telephone and mail-back surveys of a sampling of customers, prospective customers or other representative sample audiences.

The TravelScope research (produced by the United States Travel Data Center, Research Department of the Travel Industry Association of America) is one example of currently available research that provides some detail about cultural tourists, although it is not designed exclusively to measure cultural tourism. Findings are based on a monthly survey conducted among a representative sample of 20,000 U.S. households. The research is funded primarily through subscriptions from a number of state travel offices.

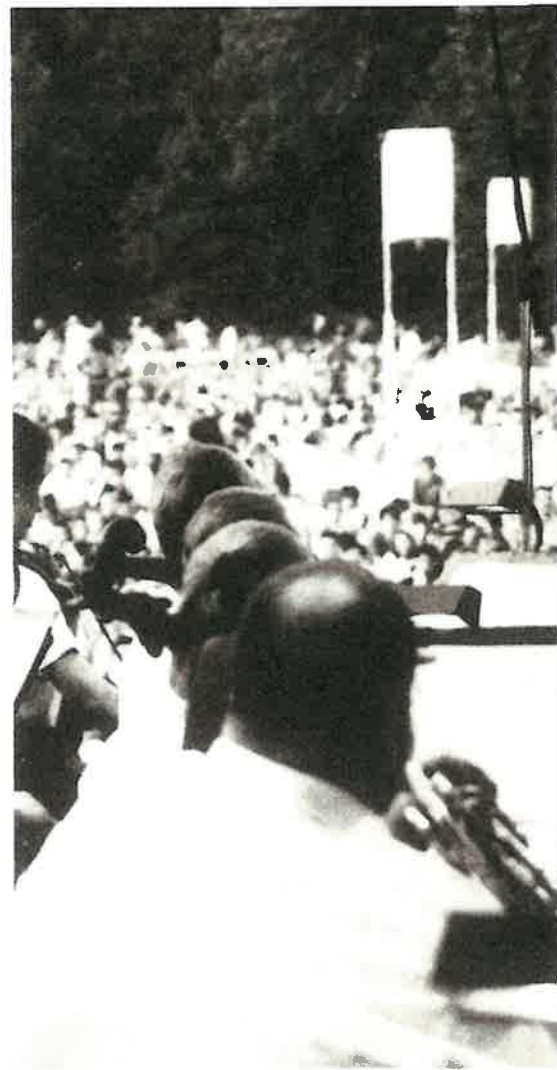
TravelScope survey respondents are asked the number of trips taken the previous month by members of their household. To be incorporated in the data, the trips must be 50 miles or more away from home or include an overnight stay. The survey collects specific information on up to three of the trips reported, including:

- primary and secondary purpose of trip
- primary and secondary mode of transportation
- the number of household members traveling (adults and children)
- whether the trip was a group tour
- states or countries visited (up to three per trip)
- key cities/places visited
- number of nights in each accommodation type
- trip expenditures
- activities including historic places/museums and cultural events/festivals



The lights along Chinatown's Grant Avenue outline the distinctive arched eaves and carved cornices similar to those in old Luchow and Canton.

Photo: San Francisco Convention and Visitors Bureau.





For an additional fee a follow-up survey, designed to provide more specific cultural tourism data, could be conducted.

FINANCING Planning for cultural tourism must include a discussion of financing. Although it is often difficult to put resources into something new, carefully planned cultural tourism initiatives offer an opportunity for a significant return on investment. The parties in such a collaboration need to come to the table understanding their own financial capabilities and how much they are willing to invest. Simple collaborations between single entities are often financed with resources at hand (such as a theater company working with a hotel to develop weekend packages). On the other hand, larger community or regional initiatives often require considerable planning and negotiation.

The tourism and cultural industries have access to a variety of sources of revenue for their marketing, product development, visitor service, research and infrastructure needs. By working together each industry can tap resources that may not be available to the other. The cultural industry has access to grants and contributions unavailable to the tourism industry. There are funds available for interpretation, audience development and other marketing projects, for capital improvements, and for local and regional planning. The travel industry has access to marketing partners and to sponsorship opportunities. In addition, both industries have access to in-kind resources of significant value: resources such as hotel rooms, museum admissions, performing arts and special event tickets, transportation and access to special venues.

Many collaborations occur with nonprofit cultural partners. When nonprofit cultural organizations and business partners work together, often the commercial party is the funder and the nonprofit party is responsible for the delivery of services. The travel industry is accustomed to collaborations where cash or in-kind equivalents are contributed by each party. There is potential for misunder-

*New York Philharmonic,
Free Summer Parks Concerts,
New York, NY.*

*Photo: Chris Lee, New York
Philharmonic Association.*



standing here, as each sector approaches financial collaborations differently.

The trend in the cultural sector is to diversify its funding and look to audiences and consumers to increase income. Cultural organizations will need to think even more entrepreneurially and not assume the role of a grantee. Both cultural and tourism organizations should be willing to put dollars on the table to fund projects.

Changes in the economy and declining federal support mean that the funding priorities of both the private sector and government agencies are shifting. The sources that are available today may not be available or appropriate tomorrow. It will be more important than ever to learn from others' entrepreneurial successes. Some potential funding mechanisms are summarized below.

EARNED AND CONTRIBUTED REVENUE One of the primary purposes of cultural tourism partnerships is to increase revenue for the participating cultural activities and organizations and for tourism related businesses. The most successful collaborations occur when all parties benefit financially: for example, by building ticket sales and admissions, filling hotel rooms, stimulating retail purchases and restaurant business.

There are a variety of mechanisms to earn and raise revenue to support cultural tourism projects. They all require an increasing understanding of entrepreneurial activities. The sources identified below are all opportunities to reach new markets, work with new partners and diversify revenues.

- corporate and foundation grants
- merchandising
- sponsorships
- fees and charges

TAXES AND FEES Many cultural tourism initiatives have been supported through state and local tax sources. In recent years, as general fund dollars became scarce, state and local governments found ways to protect and develop cultural programs, sites and facilities through the creation of dedicated tax sources and special fees.

Often local government funds are available as venture capital to support the planning, start up and administrative costs of cultural tourism programs. The most common sources are those tax revenues generated by the participating industries themselves. These funds are often reinvested in combination with private sector dollars to “prime the pump” to increase cultural tourism earnings. The most common sources of funds are:

- admissions tax
- real estate transfer tax
- audio and video rental taxes
- special taxing districts
- bed tax
- property tax credits or freezes for historic residences and landmarks
- gambling proceeds

NOTE: Many jurisdictions utilize bed tax revenues to finance both tourism and cultural organizations and activities. State and local governments spend these funds in a variety of ways, usually with a priority on promoting the area to visitors. In some communities, both industries commit a specific portion of these allocations for cultural tourism collaborations. Using these funds in ways that do not increase occupancies is often opposed by the travel industry. Careful thought must be given before increasing this tax, because increases can cause a destination to lose its competitiveness. New York recently rolled back its bed tax which, since 1990, had included a 5% tax surcharge on rooms over \$100 per night. Research demonstrated that the surcharge resulted in a 30% loss in convention and meeting business. Over a four year period, there was an estimated \$300 million loss to the State of New York.

GOVERNMENT GRANTS Arts, humanities, economic development and transportation funds available at the local, regional, state and federal levels are often appropriate for cultural tourism development. When funds are more limited, collaborative applications are encouraged.

Funds can be available for local and regional planning, audience development and marketing, technical assistance, interpretation, research and other related topics. There are a variety of governmental sources for particular projects and

Performance in the Yerba Buena gardens, San Francisco.

Photo: San Francisco Convention and Visitors Bureau.

types of communities and regions. Some are linked to rural development, to urban economic development, to specific arts and humanities initiatives, or to transportation. It is important to keep current on the availability and sources of funds, and on the appropriate deadlines and access points. Sources to investigate include:

- Federal Highway Administration/ Intermodal Surface Transportation Efficiency Act (ISTEA)
- National Endowment for the Arts
- National Endowment for the Humanities
- Institute of Museum Services
- Department of the Interior
- U.S. Department of Agriculture
- State and local arts and humanities councils and commissions
- State travel offices matching funds programs

DELTA BLUES HERITAGE

Clarksdale, Mississippi

Clarksdale is a small city with an agriculture based economy which capitalized on its Delta Blues heritage and on the playwright Tennessee Williams, who grew up in the community. Clarksdale is home to the Delta Blues Museum, the Delta Blues Festival and the Tennessee Williams Festival. Support for the museum comes from both the state arts and humanities councils, and a challenge grant from the National Endowment for the Humanities helped renovate the museum and endow a curatorial position. The National Endowment for the Arts has provided support to the Mississippi Department of Economic Development to create additional performance opportunities for blues musicians, to retain musicians in the Delta and to attract tourists to the area.



Delta Blues Museum.

*Photo: Charles Liddell,
Delta Blues Museum.*

THE ARTS AS AN INDUSTRY: THEIR ECONOMIC IMPORTANCE TO THE NY & NJ METROPOLITAN REGION Port Authority of New York & New Jersey

Major funding for this arts industry economic impact study, which provided comprehensive information on cultural tourism, was secured from the Robert Sterling Clark Foundation and American Express Company. In addition, there were a dozen other private and public funders.

A KIDS' GUIDE TO GREATER MIAMI

Metro-Dade Cultural Affairs Council

Funding for this comprehensive guide for family travelers was provided by Mervyn's and American Airlines. The Metro-Dade Cultural Affairs Council produced the colorful 20 panel guide to more than 70 youth-oriented cultural attractions in the Miami area. The copy is geared to children and encourages them to share the choices of cultural activities with their parents and friends. Over 40,000 copies have been distributed to date through the Greater Miami Convention and Visitors Bureau, the Greater Miami Chamber of Commerce and numerous other venues.

HERITAGE TOURISM PROGRAM

National Trust for Historic Preservation

In 1989 the National Trust for Historic Preservation received a three-year, \$300,000 challenge grant from the National Endowment for the Arts to initiate the Heritage Tourism Program which linked folk arts, cultural heritage and preservation to tourism-related economic development. The NEA grant was matched by \$300,000 from corporations and foundations and \$600,000 in contracts from the four pilot states: Indiana, Tennessee, Texas and Wisconsin.

HOTEL TAX SUPPORT FOR PRESERVATION-RELATED PRODUCT ENHANCEMENT Grapevine, Texas

Grapevine, Texas collects about \$2.5 million in bed tax annually from essentially two properties: a 1,500 room Hyatt Regency at the Dallas/Fort Worth Airport and a 500 room Hilton Hotel and Conference Center. Tax receipts are distributed to the Convention & Visitors Bureau which, in turn, invests approximately 18% of the revenues in historic preservation through the nonprofit Grapevine Heritage Foundation. The CVB's contributions to date have leveraged private donations to revitalize Grapevine's Main Street. Now visitors enjoy the vibrant National Register commercial district; the Heritage Center complex with its arts center, blacksmith shop and farmers market; the 1901 railroad depot, which was transformed into a museum and visitor center; and monthly performances by groups of musicians from the Southwest Blue Grass Society. Often as many as 200 musicians participate, performing in small groups throughout downtown Grapevine. Hotel occupancies have increased and the CVB believes it made a wise investment in preservation.

SCIENTIFIC AND CULTURAL FACILITIES DISTRICT Denver, CO

In the early 1980s the Colorado Legislature ended direct financial support for the arts and humanities and sharply reduced the resources of the Colorado Council on the Arts. Recognizing the importance of their cultural institutions to the quality and educational vitality of their communities, metropolitan Denver voters, in a November 1988 referendum, overwhelmingly approved a one-tenth of one percent sales tax increase to support scientific and cultural facilities. The *Arts to Zoo* campaign carried by a 3-1 margin and was backed by the Greater Denver Chamber of Commerce, the Denver Metro Convention and Visitors Bureau, the Denver Partnership, and the Colorado Business Committee for the Arts. Proceeds from the tax currently produce more than \$20 million per year for the cultural and scientific community. Last year voters reaffirmed their support of the SCFD, this time for a ten-year period.

A nine-member board of directors - one from each of the six counties and three appointed by the governor - reviews applications, distributes funds according to formulas and allocates discretionary funds. Accountability is maintained through mandatory review and reporting requirements, defined administrative procedures and public meetings. Since passage of the legislation, unpaid and reduced admissions at major cultural institutions have increased by nearly 3 million per year, programs targeted to the elderly, minorities and children have increased five-fold and cultural organizations are now the twelfth largest employer in the metropolitan area.



*Spoleto Festival
opening day
ceremonies at
City Hall in
Charleston,
South Carolina.
Photo: William Strubs*



CONCLUSION

Cultural tourism offers genuine opportunities for both the cultural and tourism industries to work together and, over time, to build business, stimulate economic growth, showcase our country's extraordinary cultural resources and encourage international and domestic visitors to explore America by experiencing the richness of its culture.

To be successful in cultural tourism both industries should work toward a common goal and see their issues and concerns in a larger context. The days of going it alone or advocating for a cause in isolation are past. Culture and tourism can be partners to encourage a positive business climate for their industries, as well as to increase support for preservation, product development, infrastructure improvements, research, marketing, and visitor service.

The President's Committee on the Arts and the Humanities believes that cultural tourism should be incorporated into industry planning at every level: national, state, regional, and local. The President's Committee also recommends:

- Protection, preservation, enhancement and development of local and regional cultural tourism assets. These assets include historic sites, buildings and heritage areas; natural areas, scenic routes and vistas; facilities and geographic areas that provide the setting for cultural expression and actual art forms and traditions.
- Improved accessibility to community, regional and thematic attractions (transportation, directional signage, appropriateness for disabled travelers).
- More research specifically on cultural tourism. Effort should be made to coordinate research at all levels and to ensure consistency in reporting economic impacts.
- Expansion of state, local and regional cultural planning to include tourism components.
- Expansion of urban, rural, suburban, resort community, statewide and regional comprehensive planning to include participation from both the cultural and tourism industries.
- Local, state and federal financial support for public-private partnerships and cultural tourism initiatives.
- Support of tax policies that are conducive to cultural tourism growth, and treat travelers and the cultural and tourism industries fairly. Opposition to policies that divert all transportation, lodging and cultural funds to general government use.
- Increased recognition for cultural tourism as an economic development tool. This includes developing a national strategy to increase cultural tourism expenditures by international visitors and the creation and dissemination of research on international cultural tourism.

Hawaiian wooden sculpture. Pu'uhonua O Honaunau, Place of Refuge, Big Island of Hawaii

Photo: Bill Abraham, Hawaii Visitors Bureau.

PRESIDENT'S COMMITTEE ON THE ARTS AND THE HUMANITIES

The President's Committee on the Arts and the Humanities was created by Executive Order in 1982 to encourage private sector support and to increase public appreciation of the value of the arts and the humanities through its projects, publications and meetings.

The Committee is composed of leading citizens, appointed by the President from the private sector, who have an interest in and commitment to the humanities and the arts. Its members also include the heads of thirteen federal agencies with cultural programs, including the National Endowments for the Arts and the Humanities, the Institute of Museum Services, the Department of Education, the Smithsonian Institution, the Library of Congress, the National Gallery of Art, and the John F. Kennedy Center for the Performing Arts.

FOR FURTHER INFORMATION, WRITE OR CALL:

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Suite 200
Washington, DC 20005
202/289-1818

American Association for State
and Local History
530 Church Street
Suite 600
Nashville, Tennessee 37219
615/255-2971

Federation of State Humanities Councils
1600 Wilson Boulevard
Suite 902
Arlington, Virginia 22209
703/908-9700

Institute of Museum Services
1100 Pennsylvania Avenue, NW
Washington, DC 20506
202/606-8536

International Association of
Convention and Visitors Bureaus
2000 L Street, NW
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Washington, DC 20036
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National Assembly of Local Arts Agencies
927 15th Street, NW
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National Assembly of State Arts Agencies
1010 Vermont Avenue, NW
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National Endowment for the Arts
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ABOUT THE AUTHORS

Sandy Guettler and Bill Moskin have worked together for over eight years on cultural tourism initiatives throughout the country and consulted independently on planning, marketing, visitor service, organizational development and financing. Both have extensive experience in their respective fields: Guettler as a state travel director and tourism executive of a convention and visitors bureau and Moskin as a local arts agency director and performing arts company manager.

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