



THE ECONOMIC IMPACT OF THE

Texas

HERITAGE TRAILS PROGRAM

TEXAS HISTORICAL COMMISSION

real places telling real stories

THE TEXAS HERITAGE TRAIL REGIONS

Travel and tourism in Texas is big business, contributing more than \$70 billion to the state's economy.

A particularly important part of that is heritage travel—visits to Texas' historic places such as the Alamo, Fort Worth Stockyards, San Jacinto Battlefield, and countless lesser known but quite impressive historic sites across the state. This travel comprises about 10 percent of all tourism in the Lone Star State—more than \$7 billion last year, supporting over 54,000 jobs.

These economic impacts are felt across Texas, from our largest cities to smallest towns. They depend on a complex network of local economic development organizations, business owners, and historic preservationists—because you can't have heritage travel without historic places.

Statewide, there is only one organization that brings together these diverse stakeholders to encourage development of Texas' historic places and cultivate tourism.

Heritage travel in the Lone Star State owes its success to the Texas Historical Commission's (THC) Texas Heritage Trails Program. Since 1998, it has been the primary source of heritage tourism information for the traveling public.

This remarkable and highly successful public-private partnership consists of 10 heritage regions covering all 254 Texas counties, each operated by its own nonprofit board of directors that coordinates efforts through the THC.

Only the Texas Heritage Trail Regions (Trails) provide a statewide infrastructure and framework for all our state's heritage tourism efforts.

Only the Trails develop local and regional partnerships to create innovative tours and promotions that showcase Texas culture and history for visitors.

And only the Trails mobilize volunteers to deliver these crucial services, with more than 70,000 volunteer hours logged since 2006.

The Texas Heritage Trails Program is an invaluable part of Texas' economy. In the following pages, you'll learn more about the work the Trails do, the impact they have throughout the state, and the communities that depend on them.

The nonprofit boards that oversee the 10 Texas Heritage Trail Regions include representation from city and county governments, economic development offices, convention and visitors bureaus, and individual destinations, all donating their time to support this critical component of their local economies. Each board manages tourism activities through a paid executive director, who maintains the region's website, coordinates local activities, provides joint marketing opportunities, seeks outside funding, and acts as a liaison between the region and THC heritage tourism staff.



TOP FIVE ECONOMIC IMPACT FACTS

1 TEXAS HERITAGE ATTRACTS TOURISTS

More than 10.5 percent of all travel in Texas is heritage-related, and that number continues to rise. Heritage tourists contribute more than their share to spending, \$7.3 billion or about 12.5 percent of total visitor spending in Texas. Of that, nearly \$2.3 billion can be attributed directly to the heritage-related portions of their trips. **According to a survey of participating sites, the Texas Heritage Trails Program increases revenue and visitation by 13.9 percent.**

2 HERITAGE TOURISM CREATES JOBS

Heritage tourism alone creates an estimated 54,000 annual jobs in Texas, in diverse sectors such as retail, construction, manufacturing, transportation and utilities, as well as services. **Overall, historic preservation activities create an estimated 79,000 jobs in Texas each year.**

3 HISTORY MUSEUMS BRING ECONOMIC VITALITY TO COMMUNITIES

Texas historical museums (there are more than 925) spend over \$93 million annually, not including capital expenditures. Even history museums in the smallest communities across the state attract thousands of visitors annually.

4 REVITALIZATION OF TEXAS MAIN STREETS MAKES GOOD BUSINESS SENSE

Historic downtowns sustain communities, draw tourists and locals, and are the focus of the Texas Main Street Program, with 89 cities currently participating. Since the program's inception in 1981, participating communities have produced an average of \$310 million annually in state GDP. **Cumulative reinvestment in Main Street districts has totaled over \$5.2 billion since 1981.**

5 HISTORIC COURTHOUSES ARE HERITAGE DESTINATIONS

Since 1999, the Texas Historic Courthouse Preservation Program has awarded more than \$271 million in grants to 93 counties. These awards made possible about \$495.6 million in total project spending from 2000 through 2016. **These projects have created more than 10,656 jobs and added over \$681 million to state GDP**, while spurring downtown revitalization and heritage tourism in counties large and small.

Original source: *Economic Impact of Historic Preservation in Texas*, University of Texas/Rutgers, 2015)

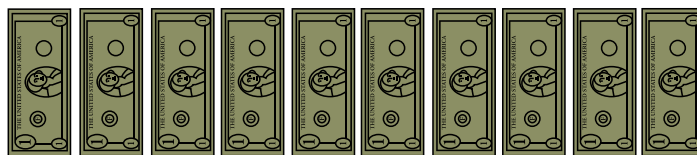
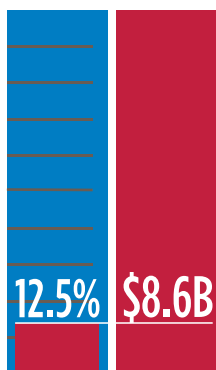
Lighting of the Square, Georgetown



HERITAGE TRAVEL TRENDS

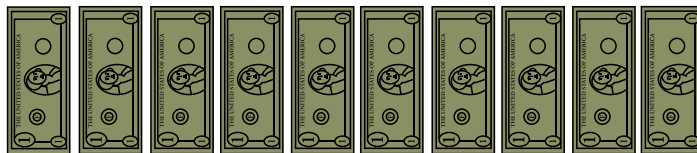
According to The University of Texas and Rutgers University, **12.5% OF DIRECT TRAVEL SPENDING IN TEXAS** can be attributed to heritage travelers. In 2015, this equated to **\$8.6 BILLION** of spending by heritage travelers in the state.

(Economic Impact of Historic Preservation in Texas, University of Texas/Rutgers, 2015)



The University of Texas and Rutgers University found that heritage travelers typically spend **20 PERCENT MORE PER DAY** than other travelers.

(Economic Impact of Historic Preservation in Texas, University of Texas/Rutgers, 2015)



The City of San Antonio considers over 58% of its overnight visitors to be “heritage visitors,” and 47% of its day trippers fall into that category. In 2015, the city released a study on the impacts of these visitors and concluded that they spend nearly **\$2.5 BILLION EACH YEAR, SUPPORTING OVER 14,000 FOOD AND BEVERAGE WORKERS, NEARLY 12,000 RETAIL EMPLOYEES, AND 9,000 WORKERS** in hotels, motels, and bed-and-breakfasts.

(Historic Preservation: Essential to the Economy and Quality of Life in San Antonio, PlaceEconomics, February 18, 2015)

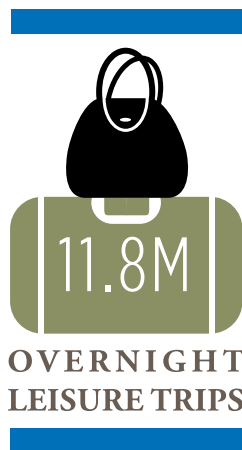


According to the U.S. Department of Commerce, more than **1 MILLION CULTURAL-HERITAGE TRAVELERS** from overseas visited Texas in 2015. This represents a more than **10% INCREASE** over the prior year.

(2015 Cultural Heritage Traveler, National Travel and Tourism Office of the U.S. Department of Commerce International Trade Administration)

Colorado’s 2011 report on the impacts of historic preservation concluded that approximately half the overnight leisure trips to Colorado (**11.8 MILLION TRIPS**) involve heritage tourism activities.

(The Economic Power of Heritage and Place—How Historic Preservation is Building a Sustainable Future in Colorado, 2011)



**VISITOR
\$1B
SPENDING**

PENNSYLVANIA

**26M
VISITORS
EACH YEAR**

The state’s “heritage area” program draws **26 MILLION** visitors each year, generating around **\$1 BILLION** in visitor spending.

(Economic Benefits of Historic Preservation in Pennsylvania, Econsult and Urban Partners, Inc., 2012)

GEORGIA



Heritage travel is a “major priority” for **26% of domestic leisure visitors** (although they represent 45.1% of leisure traveler expenditures) and **27% of international visitors** (who represent 28.9% of international visitor expenditures). These travelers spend more than **\$6 BILLION** annually, supporting **117,000 JOBS**.

(Good News in Tough Times: Historic Preservation and the Georgia Economy, PlaceEconomics, 2010)



**TRAVEL
STUDY**

(Including the Texas Panhandle)

“When multiplier effects are taken into account from the **\$132 MILLION ANNUAL ROUTE 66 INVESTMENT**, the total annual impacts to the nation include a net economic gain of 2,401 jobs, \$90 million in income, \$262 million in overall output, \$126 million in gross domestic product, and \$37 million in tax revenues.”

(Route 66 Economic Impact Study, Rutgers, 2011)



Based in Nacogdoches, the Texas Forest Trail Region serves 35 counties in East Texas, covering 900 miles from the Red River to the Gulf Coast. The region represents a diverse range of cities and towns with equally diverse resources and assets.



Roses are abundant in Tyler, "The Rose Capital of America."

Since 2008, the Forest Trail Region has conducted 42 educational presentations, 39 regional workshops, and eight annual summits in communities throughout the region. These meetings bring members and

special guests from across the region together for learning, networking, and partnership building. Workshop panels include presentations from industry leaders about best practices for marketing communities, tips to increase visitation to historic sites and attractions, and market research presentations.

In 2014, the Forest Trail Region began offering partners access to the Roger Brooks Library, a vast video library with a range of titles covering economic development topics, including branding, tourism, and community development.

As an effort to connect with the next generation of tourism industry leaders, the Region has developed a strong partnership with Stephen F. Austin State University. Through the collaboration, 21 Forest Trail Region partners participated in a free marketing research project conducted by hospitality students. In 2016, the Forest Trail Region also provided scholarships to three Hospitality Administration students from Stephen F. Austin State University to attend the Texas Association of Convention and Visitors Bureaus' midwinter summit in Beaumont.



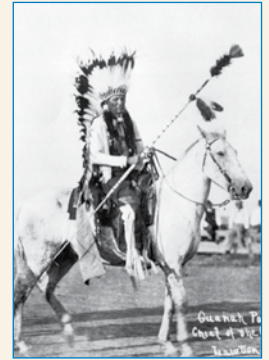
Native American dancer, Alabama-Coushatta Indian Reservation



The Texas Plains Trail Region encompasses 52 counties across 50,000 square miles of the southern Great Plains. In 2010, the Plains Trail Region developed the Quanah Parker Trail, a grassroots initiative that honors Quanah Parker, the Quahadi Comanches, and Native American heritage.

The Quanah Parker Trail is part public art installation, part historical marker, part commemoration, and part roadside attraction. Twenty-five-foot tall steel arrows planted in the ground mark places where visitors can view Comanche artifacts, locations of famous camps and battles, and routes once used to search for bison.

A New Home (Lynn County) gin owner and metalsmith constructs the arrows at no fee for sites wishing to participate in the trail after they conduct research on their Comanche history, apply for the project, and



Quanah Parker



Tribute to local World War II soldiers at the Garza County Historical Museum, Post.

cover the modest cost of arrow delivery and setup. What was initially planned as a network of 12 arrow markers is now more than 80, representing sites in almost all of the Plains Trail Region's 52 counties.

The Quanah Parker Trail has increased visitation at local museums, received heavy media coverage, and had large attendance at dedication events each year. The project has generated thousands of hours of community engagement from hundreds of participants and tens of thousands of dollars in in-kind support over the past seven years. All counties in the region have benefited economically through hotel occupancy taxes, local meals, and additional local purchases. Furthermore, the trail has become a unifying theme of heritage tourism in the region and a point of pride for small communities. In Jayton (population 534), a retirement home brands itself in commercials as being "on the Quanah Parker Trail."



The Texas Lakes Trail Region is home to the North Texas Horse Country, one of the largest concentrations of horse farms in the U.S. Large breeding farms, training facilities, and equine specialists can be found in abundance, creating a destination for professional horsemen and horse enthusiasts from around the world.

In partnership with the Denton Convention and Visitors Bureau (CVB), the Texas Lakes Trail Region worked to create the North Texas Horse Country Tours, which are rooted in the history of the region.

Behind-the-scenes tours follow an itinerary with an experienced guide in a luxury motorcoach, while self-guided driving tours allow visitors to explore at their own pace. The Denton CVB also publicizes horseback riding at some of the ranches, as well as arenas that feature rodeos and other horse-related events.

While many visits are day trips, overnight visitors in Denton and nearby towns significantly impact lodging, restaurants, and other area attractions. The tours have transformed into a powerful ambassador-building tool, fostering a local appreciation of the value of this beautiful and important historic, cultural, and agricultural resource.



Above: Pioneer Park, Dallas; Below: North Country Horse Tour, Denton



TIME TRAVELERS

For Texas' heritage traveler, the journey begins online, where TexasTimeTravel.com provides access to information on thousands of historic sites by theme or route.

Online promotions of the website generated more than 175 million impressions from 2011-15 when funding was available for advertising. This included more than 560,000 users who clicked on banner ads.

But TexasTimeTravel.com is only a conduit to the websites for each Trail Region, where users find information about heritage attractions across the urban and rural landscapes of the state. Since June 1, 2013, TexasTimeTravel.com and the 10 regional trail websites have received more than 420,000 unique views. Google Analytics suggests that at least 160,000 of those visits came from agency-placed online advertising banners and other advertising on thematic sites. High referral numbers from popular search engines (Google organic generated more than 100,000 referrals) and more than 50,000 sessions from visitors typing the domain into their browser, suggesting that print and online efforts have resulted in successful brand recognition for the campaign.

Above: Sack race at an October festival, Caddo Mounds State Historic Site; Below: Kids check out a stagecoach driven by reenactors at a Fort Lancaster State Historic Site event, Sheffield.





El Mercado, San Antonio



Visitors at the Buffalo Soldiers Museum, Houston

Travelers planning trips can view or download mobile tours, download electronic brochures, or order print copies. More than 8 million copies of these popular guides have been distributed to date, and despite the popularity of digital products, demand for the printed guides continues.

Once on the road, travelers have the advantage of more than 10,000 iconic blue and white highway signs guiding them along the Trails. The Trails network is also the basis for other heritage travel products such as the THC's recent publication, *Hispanic Texans: Journey from Empire to Democracy*.

More than 681,000 copies of the similar cultural publication, *African Americans in Texas: A Lasting Legacy*, have already been distributed. The companion Texas Time Travel Tours app launched in 2015, and now features seven thematic mobile tours. New tours featuring other Texas heritage sites are scheduled to be available this fiscal year, all using the Texas Heritage Trail Regions as their geographic basis.

REAL STORIES FOR THE ROAD

Explore the Lone Star State and its vast historical richness with the Texas Historical Commission's Texas Time Travel Tours mobile app.



The Chisholm Trail: Exploring the Folklore and Legacy



WWI: Texas and the Great War

Additional Mobile Tours Available Spring 2017.

 **Place-Based Navigation**

 **Award-Winning Documentary Shorts**

 **Immersive Audio Tracks**

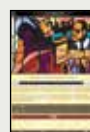
 **Curated Image Galleries**

 Available as a Web App

 Available on the App Store

 GET IT ON Google play

Other Available Mobile Tours



African Americans in Texas



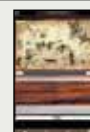
La Salle Odyssey



WWII on the Texas Home Front



Historic Bankhead Highway



Red River War of 1874-1875



Hispanic Texans: Journey from Empire to Democracy



Town Square Walk Around



TEXAS HISTORICAL COMMISSION
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Now at texastimetravel.com/app

NEXT STEPS FOR THE TEXAS HERITAGE TRAILS PROGRAM

In its 2018–19 budget request, the Texas Historical Commission (THC) has asked for \$4.8 million for the Texas Heritage Trails Program. Of six exceptional items, THC Commissioners rated this a close second behind the iconic Texas Historic Courthouse Preservation Program (THCPP).

Both the THCPP and heritage travel promotion programs were created by the Legislature in the late 1990s to help showcase state and local history. The Legislature recognized that the unique history of Texas attracts state, national, and international heritage travelers, and serves as a powerful catalyst for economic development in large and small communities across the state.

Primary funding for the Texas Heritage Trail Regions for the past 17 years has been through transportation enhancement grants from the Texas Department of Transportation. Changes in national policy now require state funding for the program, a transitional moment. If approved, Heritage Trails funding will be part of the agency's base budget. THC Austin staff support for the program has always been funded from state general revenue.

Texas Department of Information (TxDOT) grants have supported the operations of the 10 regions (most recently, \$75,000 per year per region), TexasTimeTravel.com, online tours and apps, and more than eight million printed guides distributed since 1999 through travel information centers statewide. In the past few years, resources have been shifted to create mobile-friendly websites as well as social media outreach to millions of heritage travelers.

For fiscal year 2017 only, the Governor's Office of Economic Development and Tourism allocated \$325,000 to assist the Heritage Trail Regions until the 85th Legislature

can consider the budget request. Each executive director—not THC FTE—reports to an independent regional board of directors. Board members are volunteers drawn from cities, counties, convention and visitors bureaus, chambers of commerce, economic development corporations, local businesses, and community activists. Each region draws some financial support from the communities it serves or from other supporting organizations.

Annual studies of total Texas travel by the Governor's Office isolate the heritage tourism market segment in the state at a minimum of \$7 billion per year. The Texas Heritage Trails Program works closely with the Governor's Tourism Office and the Texas Travel Industry Association.

The House Culture, Recreation, and Tourism Committee focused on its travel promotion interim charge in an April hearing at the Alamo. THC Chairman John L. Nau, III of Houston testified in support of the Heritage Trails as did the city manager of Spearman in the

Panhandle and the Chamber of Commerce CEO from Deer Park in the Houston metro area. The two latter witnesses, both longtime Heritage Trails Board members, characterized the program as similar to a cooperative providing valuable economic development assistance to Texas' 1,200 communities, most of which can't afford a separate travel promotion staff like city convention and visitors bureaus.

Across the Lone Star State, tourism professionals and communities understand the significant return on investment generated by the Texas Heritage Trails Program—the only statewide network that celebrates Texas heritage and builds the state's economy.



Above: Battleship Texas, San Jacinto

Louis C. Branch



thc.texas.gov/trails



texastimettravel.com/app