



UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

November 18, 2014

The Honorable Penny Pritzker
U.S. Department of Commerce
1401 Constitution Avenue, NW
Washington, DC 20230

Dear Secretary Pritzker:

On behalf of the United States Travel and Tourism Advisory Board, we respectfully submit this letter containing recommendations from the Cultural and Natural Heritage Subcommittee. Our subcommittee has been working to formulate relevant, measurable and attainable goals to support the efforts of the Department of Commerce and advance President Obama's National Travel & Tourism Strategy.

Over the last several months, the Cultural and Natural Heritage Subcommittee has been focused on developing strategies and recommendations designed to effectively promote, quantify and celebrate the diversity of travel and tourism experiences that are distinctive to the United States and that illuminate American culture, art, food, traditions, and natural surroundings in support of and enhancement to the National Travel & Tourism Strategy.

The recommendations contained in this letter deal *primarily* with the area of natural heritage, and specifically focus on the opportunities surrounding the centennial of the National Park Service, as a driver of commerce and engagement in the U.S. travel and tourism industry. It is important to note that travel motivated by visits to natural areas, including our national parks and monuments, will undoubtedly include visitation to arts and cultural attractions, as well as restaurants and other segments of the travel industry.

Our focus is to leverage the significant milestone of the National Park Service's centennial in 2016 to shine a spotlight on the importance of our national parks to the overall travel and tourism strategy for the United States. In the United States, federal and state lands are a major factor in tourism, which together draw nearly two billion visits annually. Timely gathering and analysis of data on visitation to these places, including state, local and national parks, is a priority.

The Federal Interagency Council on Outdoor Recreation reported in July 2014:

“Outdoor recreation has become an essential part of our American culture, and thousands of rural communities benefit from the proper management of our Federal lands. When Americans play outside during outings or overnight trips, their spending directly supports professions such as guides and outfitters, lodging operators, park managers and rangers, concessionaires, other small business owners, and many more. Outdoor recreationists made more than 938 million visits to Federal lands and waterways, spending \$51 billion and supporting 880,000 jobs.”

Recommendation: National Park Service Centennial – Using this Milestone to Look Toward the Future

One of the key outcomes of the United States Travel and Tourism Advisory Board (TTAB), through the Cultural and Natural Heritage Subcommittee, is to capitalize on the timely opportunities presented by the centennial of the National Park Service to better recognize and enhance the importance of our natural heritage. Our national parks are a great source of pride among Americans and a prime motivator of travel by international visitors, receiving over 273 million recreation visits in 2013.

As the TTAB Infrastructure and Sustainability Subcommittee reported in its December 12, 2013, Letter of Recommendation, national parks and other public lands represent key *business assets* in addition to serving as treasured *natural assets*. According to the 2013 National Park Visitor Spending Effects reportⁱ, national park visitors spent \$14.6 billion in local gateway communities within 60 miles of a park. The contribution of this spending to the national economy was 238,000 jobs, \$9.2 billion in labor income, \$15.6 billion in value added, and \$24.5 billion in output.

We applaud and vigorously support the National Park Service’s intended goals for the centennial celebration, which include working to dramatically reduce the long list of deferred maintenance projects, increase visitation and implement key initiatives to attract younger and more diverse audiences now and into the future.

These dual initiatives are critical. Based on several sources, the National Park Service has an estimated \$11.5 billion maintenance backlog, well over four times its annual discretionary budget. In addition, studies continue to validate that today’s youth lack meaningful connections to nature in general and parks in particular. Shifting cultural demographics may result in significantly fewer domestic park visitors in the future unless productive and progressive steps are taken to offset these trends. We also know that our national parks are diverse and rich in history, but fail to attract a diverse population.

We therefore present the following recommendations:

1. **Convene a National Dialogue on our National Parks in 2015.** There are many different groups, both public and private, that are focused on efforts and initiatives around the National Park Service centennial. Given the efforts, there is an opportunity for the Department of Commerce and the Department of Interior to better coordinate and ensure dialogue around our national parks and natural heritage sites leading up to the centennial. To maximize this important milestone, we recommend that the Department of Commerce and Department of Interior co-sponsor the Dialogue on our National Parks to ensure that the centennial has focused, measurable and coordinated efforts to maximize the anniversary with domestic and

international visitors, and ultimately increase visitation. The dialogue would engage public and private sector resources and would leverage experts who are diligently working to ensure the centennial's success. Currently, the Department of Interior, U.S. Travel Association, Brand USA and other organizations, including the National Parks Foundation, are all working on efforts around the centennial celebration. The centennial will not only elevate the visibility of our national parks to the world, it will be a significant driver of commerce and provide an opportunity to gain critical knowledge to help the parks grow and be successful in the future.

2. **Work with the Secretary of the Interior to initiate fundamental research and surveys to gain an accurate understanding of what parks and public lands visitors want, including the use of visitors, concessionaires and tour operators as direct sources of information in the methodology.** This ongoing research is vital to aid decision-makers in understanding who is visiting parks, who is not visiting and why, and to learn what would appeal to and motivate prospective visitors. Information gathered would include determining the length of stay, average spend, and number of overnight versus day visitors. This effort would also include diversity research and outreach. It is imperative that this research effort begins as soon as possible so that the informed conclusions can guide productive and strategic responses to the challenges at hand. We understand that funding for research is difficult; however, there are numerous organizations regularly conducting research in this area that could be leveraged. We further recommend that the Department of Commerce create a comprehensive list of research sources to ensure the ability to leverage ongoing research as needed.¹

3. **Find common ground with the Department of Interior to leverage Department of Commerce resources in addressing challenges facing our national parks. The Department of Commerce and private enterprises can assist the Department of Interior in understanding and addressing declining domestic visitation in parks and protected areas by making these assets more attractive to millennials and other demographic groups – especially those groups that may be responsible for low visitation rates, now and in the future.**

The chart below shows declining visitor trends in our national parks.

Annual Summary Report

Bookmark this report: [https://irma.nps.gov/Stats/SSRSReports/System Wide Reports/Annual Summary Report \(1904 - Last Calendar](https://irma.nps.gov/Stats/SSRSReports/System Wide Reports/Annual Summary Report (1904 - Last Calendar)

Summary

Year	Reporting Units	Recreation Visitors	Concessioner Lodging	Concessioner Camping	Tent Campers	RV Campers	Backcountry Campers
2009	360	285,579,941	3,490,723	1,310,347	3,184,255	2,150,170	1,860,162
2010	363	281,303,769	3,418,895	1,277,622	3,277,151	2,256,692	1,763,541
2011	367	278,939,216	3,310,303	1,209,758	3,229,241	2,155,330	1,715,611
2012	367	282,765,682	3,297,080	1,255,590	3,203,413	2,121,646	1,816,904
2013	370	273,630,895	3,095,769	1,221,314	2,993,845	1,976,551	1,722,663
		1,402,219,503	16,612,770	6,274,631	15,887,905	10,660,389	8,878,881

¹ Advancing the National Park Idea – Connecting People and Parks

http://www.npca.org/assets/pdf/Committee_People_and_Parks.PDF Strong Bipartisan Support for National Parks
<https://www.corpsnetwork.org/sites/default/images/advocacy/Strong-Bipartisan-Support-For-National-Parks.pdf>

We must think beyond traditional and current management strategies to ensure that our nation's system of parks remains relevant to future visitors. We believe it will be necessary to diversify and enhance the type of experiences and accommodations available in our parks and other public lands. Research-based solutions may include, but may not be limited to: increasing wireless access in parks and protected areas, raising the profile of parks in social media and allowing visitors to stay connected while visiting our parks; enhancing the attractiveness of underutilized campgrounds by upgrading amenities, including cultural and arts resources, and offering different types of options such as yurts, cabin tents, and cabins; and expanding public-private partnerships and business opportunities to assist in meeting the changing consumer needs and behaviors. Sustaining and growing the visitor base is of critical importance. The subcommittee believes there is an opportunity for a public-private partnership model.

(Note: We will be addressing the issue of diversity, including outreach efforts to the African, Asian, indigenous and Hispanic populations, in the subcommittee's next recommendations.)

4. **Establish methods to collaborate with and integrate existing federal programs and mandates with the Department of Commerce's agenda.** Existing assets, including those in the private sector, can be leveraged in the marketing efforts within the Office of Travel and Tourism Industries. For example, Let's Move Outside, created by First Lady Michelle Obama and administered by the Department of Interior, was created with the specific goal to get kids and families to take advantage of America's great outdoors. America's great outdoors abounds in every city, town and community – including one-fifth of the nation's land – including millions of acres of national forests, parks and trails. Another example is the Discover our Shared Heritage program. This effort, under the National Park Service, provides detailed itineraries on historic destinations, including self-guided tours to historic places, most of which are listed in the [National Register of Historic Places](#). Spotlighting different communities, geographic regions and themes across the country, the travel itineraries expose both domestic and international travelers to places significant in American history, architecture, archeology, engineering, and culture. While the international travel market is of critical concern to our natural and cultural tourism, 54 percent of Americans don't have passports, making the focus even more important to our domestic market. Again, this is another example where the private sector could participate and support a more coordinated promotional and visibility effort.
5. **Advocate for and support a National Summit during 2016, the year of the National Park Service Centennial (perhaps best sponsored by the Federal Interagency Council on Outdoor Recreation, or FICOR), to foster critical dialogue between government and business leaders on how protecting and preserving our public lands and increasing business opportunities can be complementary activities.** The theme of this summit is envisaged to be *"The Next 100 Years: Revitalizing and Re-envisioning Access, Visitation, and Protection of our Public Lands."* Facilitated dialogue-driven content would include: a presentation of the results and implications of relevant research as previously stated; discussing and working to take steps to resolve the policy and institutional reasons for the lack of consistency and transparency in permitting business activities across public land agencies; addressing opportunities to be more responsive

to changing consumer needs and behaviors; and an action-oriented forum to discuss and identify solutions to the issues presented. The Federal Interagency Council on Outdoor Recreation (FICOR) is well positioned to sponsor such a summit. *(FICOR: President Obama launched the America's Great Outdoors (AGO) initiative in April 2010 to address the threat of a diminished connection between people and the outdoors. The AGO Report was presented in February 2011 and called for the establishment of the FICOR. The FICOR is composed of the agency directors of the Bureau of Land Management, the National Park Service, the U.S. Fish and Wildlife Service, the Bureau of Reclamation, the U.S. Forest Service, the U.S. Army Corps of Engineers, and the National Oceanic and Atmospheric Administration. The purpose of the FICOR is to support and enhance outdoor recreation access and opportunities on federal public lands, waters and shores. The goal of the FICOR is to promote better coordination and collaboration among Federal agencies whose missions or programs include providing outdoor recreation amenities/opportunities and conserving or managing natural and cultural resources used or visited for outdoor recreation.)*

Additional organizations should be invited to participate in this summit, including: state park and tourism organizations; associations representing businesses active on public lands, including the National Park Hospitality Association, America Outdoors Association, Adventure Travel Trade Association and the National Ski Areas Association; key transportation-related interests; and other allied organizations.

Finally, it is important to effectively measure the impact of our natural resources and fully understand their economic contribution. The *2013 National Park Visitor Spending Effects: Economic Contributions to Local Communities, States and the Nations*, begins to address this related specifically to our national parks. Our subcommittee, in collaboration with the Research subcommittee, will be looking into data sources available to make a recommendation related to accessing, consolidating and ultimately better utilizing data to more effectively market our natural tourism related resources.²

We believe the recommendations contained within this document are achievable and would serve to enhance, promote and grow the travel and tourism industry in the United States. We look forward to sharing additional recommendations with you over the next several months and to begin the implementation process for the benefit of our nation's travel and tourism industry.

We thank you for the continued opportunity to serve as members of the U.S. Travel and Tourism Board and look forward to our continued work together.

Respectfully submitted,



Sam Gilliland
Chair



Kathleen Matthews
Vice Chair

² http://www.nature.nps.gov/socialscience/docs/NPSVSE2013_final_nrss.pdf

Appendix. Historical Visitation Data

Annual Summary Report

<https://irma.nps.gov/Stats/SSRSReports/System Wide Reports/Annual Summary Report>

Summary

Year	Reporting Units	Recreation Visitors	Concessioner Lodging	Concessioner Camping	Tent Campers	RV Campers	Backcountry Campers
1986	304	281,094,850	3,538,176	786,102	3,460,005	3,788,528	1,644,691
1987	305	287,244,998	3,726,504	852,820	3,955,795	4,043,206	1,574,706
1988	309	282,451,441	3,787,463	865,694	3,921,104	3,937,271	1,617,706
1989	314	269,399,837	3,880,622	798,614	3,929,665	3,890,367	1,620,641
1990	316	255,581,467	3,911,135	822,862	4,033,130	3,777,683	1,650,475
1991	319	267,840,999	4,012,785	774,302	4,204,744	3,621,586	2,032,379
1992	324	274,694,549	4,118,057	740,477	4,382,824	3,672,266	2,162,130
1993	327	273,120,925	3,958,637	736,308	4,102,758	3,394,148	2,406,697
1994	327	268,636,169	3,904,754	756,929	4,240,237	3,414,597	2,363,827
1995	328	269,564,307	3,775,377	1,070,638	3,866,306	3,158,355	2,189,727
1996	329	265,796,163	3,754,573	1,052,036	3,680,310	2,771,704	2,124,793
1997	336	275,236,335	3,562,564	1,023,736	3,589,246	2,707,618	2,169,296
1998	342	286,762,265	3,612,940	1,078,800	3,457,825	2,630,972	2,056,747
1999	341	287,130,879	3,676,049	1,101,517	3,544,605	2,652,773	1,968,930
2000	344	285,891,275	3,678,262	999,658	3,395,816	2,501,401	1,935,276
2001	345	279,873,926	3,574,734	1,008,618	3,326,852	2,404,840	2,032,886
2002	349	277,299,880	3,463,606	1,071,953	3,357,513	2,404,824	1,906,473
2003	353	266,099,641	3,493,479	1,026,930	3,302,637	2,400,232	1,816,088
2004	356	276,908,337	3,508,497	966,135	3,128,014	2,321,669	1,725,309
2005	356	273,488,751	3,430,856	1,186,955	2,974,269	2,168,287	1,668,558
2006	359	272,623,980	3,396,310	1,178,308	2,882,297	2,109,404	1,659,484
2007	360	275,581,547	3,591,435	1,299,527	3,003,270	2,107,541	1,704,059
2008	360	274,852,949	3,589,664	1,224,864	2,956,761	2,012,532	1,797,912
2009	360	285,579,941	3,490,723	1,310,347	3,184,255	2,150,170	1,860,162
2010	363	281,303,769	3,418,895	1,277,622	3,277,151	2,256,692	1,763,541
2011	367	278,939,216	3,310,303	1,209,758	3,229,241	2,155,330	1,715,611
2012	367	282,765,682	3,297,080	1,255,590	3,203,413	2,121,646	1,816,904
2013	370	273,630,895	3,095,769	1,221,314	2,993,845	1,976,551	1,722,663
		7,729,394,973	101,559,249	28,698,414	98,583,888	78,552,193	52,707,671

¹Natural Resource Report NPS/NRSS/EQD/NRR—2014/824