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# The Potential

## Hunting and Fishing

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- Economics
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- The Potential

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Executive Summary
The Walton Family Foundation is interested in supporting regional economic development opportunities in the Lower Mississippi River region that will lead to natural resource conservation and preservation. Toward this end, they have supported four pilot projects with grantee organizations that are interested in developing nature-based tourism opportunities. Each grantee organization is working in a different sub-region, including western Mississippi, eastern Louisiana, and western Tennessee, or in the region as a whole. While each grantee organization is interested in many types of nature-based tourism, there is overlap across them in the areas of paddling, historical/cultural tourism and non-consumptive wildlife watching. Two pilots are also interested in the consumptive activities of hunting and fishing.

Our research has shown that there is significant potential in these specific tourism areas, nationally and in the Lower Mississippi River region. Paddling is increasing each year, according to the American Canoe Association and the Outdoor Industry Foundation’s 2009 Special Report on Paddlesports. Over 17 million Americans ages 6 and older (6.4%) participated in kayaking, canoeing, and rafting in 2008 as compared with 6.3% in 2007 and 4.7% in 2006. Regarding specific paddling activities, 9.9 million Americans participated in canoeing in 2008, 7.8 million Americans participated in kayaking and 4.7 million in rafting. Paddling participants made 174 million outings in 2008, averaging 10 days per participant.  

A 2009 study of U.S. Cultural and Heritage Travel reveals that 78% of all U.S. leisure travelers participate in cultural and/or heritage activities while traveling, translating to 118.3 million adults each year.

There were 71.8 million wildlife-watching participants in 2011 (up from 71.1 million in 2006), nearly 23% of the US population. Birding is the most common form of wildlife watching. In 2011, there were 46.7 million birdwatchers or birders, 16 years of age and older, in the United States – about 15 percent of the U.S. population.

In 2011, 13.7 million people, 6% of the U.S. population 16 years old and older, went hunting. Overall hunting participation increased 9% from 2006 to 2011. As one of the most popular outdoor recreational activities in the United States, fishing attracted 33.1 million individuals 16 years old and older in 2011. Comparing results from the 2011 Fishing, Hunting, and Wildlife-Associated Recreation Survey with those of the 2006 Survey reveals the number of anglers increased 11%.  

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6 Ibid.
The economic potential of these nature-based tourism subsectors is significant. Average expenditures per party and per excursion range from $144 for local paddlers to $503 for non-local paddlers, about $1,000 per cultural/historical tourist, and $766 per wildlife watcher. If we assume that gaps and obstacles to these forms of tourism can be filled and overcome, there is significant economic potential to be realized. For example, extrapolating average expense figures, there is potential for up to $500,000 in direct spending for adding 1,000 paddlers, $1 million for adding 1,000 historical/cultural tourists, $766,000 for adding 1,000 wildlife watchers, $1.2 million for adding 1,000 anglers or $2.5 million for adding 1,000 hunters. This does not include the impact of economic multipliers or tax revenues, meaning the actual economic impact would likely be much greater.

There is also significant crossover between these different forms of nature-based tourism. Based on conversations with historical/cultural tourism representatives in the region, there is significant crossover between cultural/heritage tourism and nature-based tourism. We have learned that the families of those who are hunting and fishing are seeking non-consumptive activities like paddling, wildlife watching and historical/cultural tourism opportunities. Through key informant interviews in the region, we have found that there is a real understanding that this area needs more cross-marketing between different types of tourism and specific tourism destinations. This suggests that, with solid coordination, developments in each of these nature-based tourism subsectors can benefit the other.

What needs to be done to realize this potential? First, there are several gaps that need to be filled in each of these subsectors of nature-based tourism. For example, in the areas of paddling and wildlife watching, there is a real need for more outfitters and guides, access points to the river, itineraries, maps, and other amenities.

There are also overall gaps and obstacles to strengthening tourism in general and nature-based tourism in particular in this region. Some of these include:

1. A lack of lodging options.
2. A lack of dining options.
3. The need for more of a regional online marketing and presence.
4. The need for itineraries that combine different kinds of attractions.

Finally, in order to scale up impact in this region, it is critical to begin to connect partners with similar interests. There are many people and organizations working on similar types of tourism and recreation opportunities, and several are willing to think about how to scale up impact regionally. These are listed and

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their work explained later in the report. There may also be value in engaging agencies in each state devoted to consumptive and non-consumptive forms of recreation, historic preservation, and tourism to discuss cross-marketing and regional marketing opportunities.

There are a variety of next steps that could be taken to move this regional nature-based tourism endeavor forward. While the pilots on the ground are doing great work, a regional initiative requires more partners with shared goals and an interest in taking this work to scale. As possible next steps, we suggest convening people from the four-state region who have an interest in working at a regional scale in an effort to articulate shared goals. This could include developing a strategy to measure progress. Additional possible next steps include:

1. Enlist the assistance of a tourism development consultant. Yellow Wood has had experience with Solimar International\(^{11}\) which has specific expertise in community-based tourism; David Brown is working with the Ford Foundation’s community-based tourism grantee in Alabama, SURREF. There are undoubtedly other tourism development consultants.
2. Conduct a more detailed investigation into consumer tourism demand to provide information needed to determine priorities with respect to lodging, dining and other services and amenities. SURREF has worked with the Marketing Workshop\(^{12}\) to do a study of consumer tourism demand in Alabama.
3. Plan one or more learning journeys. Walton Foundation staff, grantees in the four states, and those regional partners that are engaged need to think about what the focus of a learning journey would be, whether to learn more about a particular form of tourism (like paddling) or ways that regions have promoted themselves collaboratively.
4. Research best practices in addressing specific gaps such as public education, hospitality training or local dining options. There may also be value in researching best practices around educating community residents about the value of their hometowns and regions so that they are better able to promote what is interesting and fun about where they live.
5. Develop and test market sample potential tourism itineraries. This was discussed at the October meeting of Walton nature-based tourism grantees held in Louisiana. This still seems to make sense as a strategy for engaging state tourism directors and other tourism professionals in the offerings of the Lower Mississippi River region. The two we have discussed so far include one focused on John Jay Audubon’s travels through the Lower Mississippi River region. The other we discussed was focused on blues or music in general along this corridor.
6. Bring together state tourism directors to explore the potential for these four states (Arkansas, Louisiana, Mississippi, and Tennessee) to work together to support the potential tourism offerings of a larger Lower Mississippi River region nature-based tourism group. There may be a discussion about cross-marketing between states, recognizing that the majority of tourists to this region are coming from within the region.
7. Consider the creation of a potential regional value chain or a regional network for nature-based tourism along the Lower Mississippi River region. There are many networks already operating in this area, but none that are specifically focused on nature-based tourism. This would allow Walton and its grantees to begin to collaborate with others who have similar interests and goals.

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Introduction

The Walton Family Foundation is interested in creating and supporting regional economic development strategies along the Lower Mississippi River region that may then support natural resource conservation in this region. To date, the Walton Family Foundation provides support to four grantees in the Lower Mississippi River region whose work is focused on nature-based tourism. These four grantees are the Louisiana State University AgCenter, Lower Mississippi Flyway of the National Audubon Society, Mississippi River Corridor – Tennessee, and the Lower Delta Partnership.

The Lower Mississippi Flyway program office of the National Audubon Society serves the National Audubon Society programs in Arkansas, Mississippi, and Louisiana. Audubon’s mission is to conserve and restore natural ecosystems, focusing on birds, other wildlife, and their habitats for the benefit of humanity and the earth’s biological diversity. For more than a century, Audubon has built a legacy of conservation success by mobilizing the strength of its network of members, Chapters, Audubon Centers, state offices and dedicated professional staff to connect people with nature and the power to protect it.

The Louisiana State University Agricultural Center, known as the LSU AgCenter, is one of 10 institutions within the Louisiana State University System. The LSU AgCenter’s mission is to provide the people of Louisiana with research-based educational information that will improve their lives and economic well-being. The LSU AgCenter includes the Louisiana Agricultural Experiment Station, which conducts agricultural-based research, and the Louisiana Cooperative Extension Service, which extends the knowledge derived from research to the people of the state. The LSU AgCenter plays an integral role in supporting agricultural industries, enhancing the environment, and improving the quality of life through its 4-H youth, family and consumer sciences, and community development programs.

The Mississippi River Corridor – Tennessee, Inc. (MRCT) is a 501(C)(3) nonprofit Tennessee corporation. Its mission is to identify, conserve and interpret the region’s natural, cultural and scenic resources to improve the quality of life and prosperity in West Tennessee. The MRCT is dedicated to the economic development, land conservation, environment and wildlife preservation of the six counties that border the Mississippi River along the entire western border of Tennessee. The six counties that comprise the Corridor are Shelby, Tipton, Lauderdale, Dyer, Lake and Obion.

The Lower Delta Partnership is a diverse group of individuals, state and federal agencies, and non-governmental organizations who are sensitive to the area’s rich cultural history and who share a common vision of improving economic conditions for its citizens as well as for improving the natural environment of Mississippi’s Lower Delta Area.
Figure 1: Counties Included in the Lower Mississippi River Economic Profile

While the Lower Mississippi River Region as defined by the Lower Mississippi River Conservation Committee includes the portion of the Mississippi flowing from southern Illinois to the Gulf of Mexico, this initiative has been defining the Lower Mississippi River region as the parts of Arkansas, Tennessee, Mississippi and Louisiana around the River. The four Walton grantees in this region have very specific counties within which they work, which can be seen below. The maps below, from the US Census Bureau, indicate which counties are included in the target region addressed by this report. Larger maps are available in Appendix F.

Figure 2: Arkansas Counties Included in Report

Figure 3: Tennessee Counties Included in Report.
The economic impacts of tourism on the selected counties represented by the Walton Family Foundation Lower Mississippi River pilots are impressive: tourism accounts for almost $4 billion in expenditures, over $2 billion in payroll, almost 60,000 jobs, $183 million in state tax receipts and $106 million in local tax receipts. 14

14 See Table 6 in Appendix B. Sources include:
Methodology

Yellow Wood Associates was engaged in the fall of 2011 to present two workshops to pilot grantees. The first workshop introduced the Ford Foundation’s Wealth Creation in Rural Communities approach and the second focused more specifically around the conceptualization and construction of wealth creation value chains.

The next step in our work together was determining the demand for nature-based tourism in this region through a study of demand at the regional and local levels, related to specific focus areas of interest to the pilots. Understanding demand is a key part of developing a demand-driven wealth creation approach. In order to focus, we developed a table showing the focus areas of each of the four pilots with respect to nature-based tourism. While the pilots each have individual focus areas specific to their particular sub-region, there was overlap across the pilots in three areas: paddling, historical/cultural tourism, and non-consumptive wildlife watching. As a result, the group decided to focus the regional demand study on nature-based tourism in general, but also more specifically around these three more specific areas of shared tourism demand. Based on two pilots’ interest in consumptive activities of hunting and fishing, there is also a section relating to those activities. This report shares the results of our investigation into the demand for nature-based tourism as well as paddling, historical/cultural tourism, non-consumptive wildlife watching, and hunting and fishing in the four states of the Lower Mississippi River region.

Much of the secondary data in this report is from state tourism agencies across the region. All data used is the most recent data available. Data limitations include inconsistent data collected state to state as well as limited data at the county level. National level data is also not aligned with the boundaries of the study region. In addition, between 20 and 30 interviews were conducted with key informants throughout the region and beyond focused on tourism in general or one of the sub-sectors mentioned above.

The intended use of this information is to better understand the tourists coming to the region, what they are looking for, and how what is on the ground in the region is or is not meeting that demand. In addition, this report begins to explore some of the regional players who might serve as partners to the pilots on the ground, and potential next steps for moving the nature-based tourism sector to scale in this region.

The research conducted for this report has revealed and/or confirmed the following:

- There is demand for all areas of tourism, including paddling, historical/cultural tourism, non-consumptive wildlife watching, and hunting and fishing, and opportunities for cross-over in participation among them.
- Tourists increasingly find information about tourism experiences online.
- There are regional tourism development efforts, but none that seem to be focused solely on tourism in the Lower Mississippi River region.
- Tourists like to participate in a variety of activities, so it is essential to develop multiple types of opportunities concurrently.
- Gaps in tourism infrastructure include:
  - Lodging
  - Dining

15 Two pilots were especially interested in consumptive wildlife activities, like hunting and fishing, which is the reason there is a section on those activities. Other pilots did not get as far in their specific areas of interest, which included educational tourism.
Tourism in the Region

Tourism is one of the most powerful – and most often overlooked – tools for promoting economic and social development, in rich and poor countries alike. Tourism supports 10% of all economic activity on the planet.\textsuperscript{16} In most countries, the most interesting and unique attractions, such as indigenous culture, wildlife, and nature reserves, are nearly always located in rural areas. This presents real opportunities for tourism to contribute to both the economic development and conservation of a destination.

In the Mississippi River counties of Tennessee, Arkansas, Mississippi, and Louisiana (See Appendices A and F), the population has faced economic displacement and lack of opportunity. Despite the variety of river-related cultural, historical and natural assets, this region is one of the nation’s most economically distressed areas. Poverty levels significantly exceed the national average. The Mississippi River itself has the potential to be the main attraction of this region, increasing tourism and transforming the regional economy. Tourism on the river already generates some $20 billion in annual revenue and supports more than 300,000 jobs, but most of this takes place on the river north of St. Louis, Missouri, where significant investment in public access infrastructure has been prioritized. While the Lower Mississippi River is on par with the Florida Everglades as a wildlife and wilderness experience, public use is hindered by private ownership of nearly all riverbank acreage on both sides of the river.\textsuperscript{17}

It is clear that the Lower Mississippi River region already has a great deal to offer tourists. Much of the offerings in this region are centered on the larger urban areas of this region, including Memphis and New Orleans. Memphis is part of the target region this report studies but New Orleans is not, because none of the Lower Mississippi River region nature-based tourism grantees cover this area. Leaving New Orleans out of this study means that potential demand may be missing. Dora Ann Hatch of the LSU AgCenter, however, did make contact with New Orleans contacts, who explained that visitors to New Orleans are rarely traveling beyond New Orleans to other parts of Louisiana. While including New Orleans in the study may have increased the potential demand in the region, it is more likely that those visiting New Orleans are focusing their travel around New Orleans. New Orleans is an aggregation and entry point for travel into the Lower Mississippi River region, so potential next steps may include engaging potential partners in conversations about how to bring tourists to New Orleans farther into the Lower Mississippi River region.

Tourism-Related Activities

The next section of this report examines demand for four tourism-related activities in greater depth: paddling, historical/cultural tourism, non-consumptive wildlife watching, and consumptive activities like hunting and fishing.

\textsuperscript{16} Solimar International. \url{http://solimarinternational.com/about-us/why-tourism}
\textsuperscript{17} Restoring America’s Greatest River. \url{http://www.alcnet.org/files/Lower_Mississippi_River.pdf}
Overview of the Active Outdoor Recreation Economy

Two of the three areas of shared focus for the Walton grantees – paddling and wildlife watching – and consumptive activities of hunting and fishing (which are of interest to two grantees) are part of what is called the Active Outdoor Recreation Economy, which includes paddling, biking, camping, fishing, hunting, snow sports, trail and wildlife viewing. The active outdoor recreation economy:

- Contributes $646 billion annually to the U.S. economy and supports nearly 6.5 million jobs across the U.S.
- Generates $80 billion in annual local, state and national tax revenue and provides sustainable growth in rural communities.
- Generates $645 billion annually in retail sales and services across the U.S. 18

The outdoor recreation economy grew approximately 5 percent annually between 2005 and 2011 – this during an economic recession when many industries contracted. 19

Table 1: National and Regional Economic Impacts of Active Outdoor Recreation on Economies, Employment, Sales and Taxes (2006 and 2012)20

<table>
<thead>
<tr>
<th></th>
<th>National21</th>
<th>East South Central (AL, KY, MS, TN)22</th>
<th>West South Central (AR, LA, OK, TX)23</th>
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<tr>
<td>Total contribution</td>
<td>$646,000 billion</td>
<td>$18,790 million</td>
<td>$38,365 million</td>
</tr>
<tr>
<td>Jobs generated</td>
<td>6.1 million</td>
<td>215,126</td>
<td>379,933</td>
</tr>
<tr>
<td>Gear related sales</td>
<td>$120.7 billion</td>
<td>$2,636 million</td>
<td>$4,787 million</td>
</tr>
<tr>
<td>Trip related sales</td>
<td>$524.8 billion</td>
<td>$10,875 million</td>
<td>$19,077 million</td>
</tr>
<tr>
<td>Taxes (federal, state, local)</td>
<td>$80 billion</td>
<td>$2,545 million</td>
<td>$3,782 million</td>
</tr>
</tbody>
</table>

19 Ibid.
20 Ibid.
21 Ibid.
22 Outdoor Industry Foundation. 2006. The Outdoor Recreation Economy.
23 Ibid.
In the table below, it is clear that wildlife watching has the highest participation of the outdoor recreation activities listed on a national basis, although the jobs generated and the federal and state taxes generated are on the lower side. Participation in bicycling and camping is similarly high, generating large numbers of jobs and significant federal and state taxes.

Table 2: Active Outdoor Recreation: U.S. Participation (2006)\textsuperscript{24}

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participation</th>
<th>Jobs Generated</th>
<th>Federal/state taxes generated</th>
</tr>
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<tbody>
<tr>
<td>Bicycling</td>
<td>60 million</td>
<td>1,135,000</td>
<td>$17.7 billion</td>
</tr>
<tr>
<td>Camping</td>
<td>45 million</td>
<td>2,334,000</td>
<td>$36.4 billion</td>
</tr>
<tr>
<td>Fishing</td>
<td>33 million</td>
<td>587,000</td>
<td>$4.1 billion</td>
</tr>
<tr>
<td>Hunting</td>
<td>13 million</td>
<td>323,000</td>
<td>$2.2 billion</td>
</tr>
<tr>
<td>Paddling</td>
<td>24 million</td>
<td>308,000</td>
<td>$4.8 billion</td>
</tr>
<tr>
<td>Wildlife viewing</td>
<td>66 million</td>
<td>467,000</td>
<td>$2.7 billion</td>
</tr>
</tbody>
</table>

In Tennessee and Louisiana, the two states in the region where data on the active outdoor recreation economy are available, wildlife viewing has the highest participation rates of the outdoor recreation activities. Twice as many Tennessee residents as Louisiana residents are paddling, 8% of residents compared with 4% in Louisiana. And almost twice as many residents in Tennessee are participating in wildlife viewing as are those in Louisiana, 1.7 million to 800,000.\textsuperscript{25} See Appendix C for more information on the outdoor recreation economy in Tennessee and Louisiana.

The Outdoor Industry Foundation’s 2012 report about the Outdoor Recreation Economy focuses on direct economic impact rather than using indirect, implied, multiplier or ripple effects that include impacts of spending, jobs and wages as they circulate further through the economy. If these effects were used as the basis of the 2012 report, the stated economic impact and jobs impact would be substantially larger: $1.6 trillion in economic impact and 12 million jobs.\textsuperscript{26}

**Obstacles to Success**

There are at least three significant obstacles to developing tourism on the Lower Mississippi River. First, a majority of the land in the Delta is privately owned by timber companies and hunt clubs which results in very limited public access. For example, 90% of Louisiana land is privately owned.\textsuperscript{27} Second, in many places, the river is hidden from public view by private land and levees. There is also a fear of the river that needs attention. According to John Ruskey,\textsuperscript{28} ninety percent of locals tell people not to go on the Mississippi River. The river is often associated with flooding and hardship. However, experience with the Lower Mississippi River Fishing and Boating Trail shows that with a collaborative approach, these obstacles can be overcome.

\textsuperscript{24} Outdoor Industry Foundation. 2006. The Outdoor Recreation Economy.
\textsuperscript{25} Outdoor Industry Foundation. 2006. Tennessee Active Outdoor Recreation Economy, \url{http://www.outdoorindustry.org/pdf/TennesseeRecEconomy.pdf}
\textsuperscript{27} Landscope American. 2008 – 2010 data. \url{http://www.landscape.org/louisiana/overview/}
Economic Impact of the Mississippi River Fishing and Boating Trail: Buck Island Case Study

One impressive example of collaboration is the creation of the Mississippi River Fishing and Boating Trail, with help from the American Land Conservancy, the Lower Mississippi River Conservation Committee (LMRCC), state and federal resource agencies, industry, elected officials and nonprofit organizations, which hopes to be a recreational river trail from St. Louis, Missouri down to the Gulf of Mexico. The purpose of the trail is to increase public use of the river by establishing a series of publicly owned islands, boat ramps, primitive campsites and parks for people to enjoy, thereby generating economic opportunities for river communities. The first segment of this trail, the Buck Island project, has been successful in offering recreational opportunities for hiking, camping, bird watching, fishing and picnicking. Several land-based trail initiatives will complement the Mississippi River Fishing and Boating Trail as it evolves, including the Delta Heritage Trail, the Audubon Society’s Great River Birding Trail, the multi-use Mississippi River Trail, and for automobiles, the Great River Road.

With the restoration and development of Buck Island 29, which the American Land Conservancy purchased through auction in 200530, there have been some economic development gains. This purchase allowed 880 acres of previously private land to be available for public use.

The purchase of Buck Island created economic impacts and greater recreational usage in a 31 county area in the Arkansas Delta, which has a population of 1.3 million and a per capita income of $24,800.31

There was a significant increase in days of usage from 2006 to 2009 as a result of the Lower Mississippi River Fishing and Boating Trail.

This has led to an increase in expenditures in the region, creating economic impacts. Resident anglers spent $36/day while non-resident anglers spent $67/day. Resident wildlife watchers spent $31/day while non-resident wildlife watchers spent $97/day.

Table 3: Recreational Use of the Lower MS River Fishing & Boating Trail: 2006 Usage in the 31 County Area 32

<table>
<thead>
<tr>
<th>Type of Use</th>
<th>Usage</th>
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<tbody>
<tr>
<td>Angler Days - Resident</td>
<td>5.7 million</td>
</tr>
<tr>
<td>Angler Days – Nonresident</td>
<td>751,000</td>
</tr>
<tr>
<td>Wildlife Watching Days - Resident</td>
<td>615,000</td>
</tr>
<tr>
<td>Wildlife Watching Days - Nonresident</td>
<td>167,000</td>
</tr>
</tbody>
</table>

Table 4: Increased Recreational Use since 2006 as a Result of the Lower Mississippi River Fishing and Boating Trail 33

<table>
<thead>
<tr>
<th>Increase in Days as a Result of the Trail</th>
<th>Resident</th>
<th>Nonresident</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angler Days</td>
<td>5% (287,000)</td>
<td>10% (75,100)</td>
<td>362,700</td>
</tr>
<tr>
<td>Wildlife Watching Days</td>
<td>10% (61,500)</td>
<td>15% (25,050)</td>
<td>86,550</td>
</tr>
</tbody>
</table>

Table 5: Economic Impacts of Buck Island Investments Since 2006 34

<table>
<thead>
<tr>
<th></th>
<th>Angling</th>
<th>Wildlife watching</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail expenditures</td>
<td>$14.3 million</td>
<td>$4.1 million</td>
</tr>
<tr>
<td>Output</td>
<td>$18.2 million</td>
<td>$5.4 million</td>
</tr>
<tr>
<td>Jobs</td>
<td>275</td>
<td>89</td>
</tr>
<tr>
<td>Income</td>
<td>$6.6 million</td>
<td>$2 million</td>
</tr>
<tr>
<td>State/local tax revenues</td>
<td>$767,700</td>
<td>$229,000</td>
</tr>
<tr>
<td>Federal tax revenues</td>
<td>$1.3 million</td>
<td>$399,000</td>
</tr>
</tbody>
</table>

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32 Ibid.
33 Ibid.
Paddling

National Trends
According to the 2006 US Fish and Wildlife Survey, there were 24 million paddlers in North America. Since 2001 alone, recreational kayaking grew by 27 percent. According to Wade Blackwood, Executive Director of the American Canoe Association, “Paddling is increasing. Every 10 years or so, the National Recreation Education Association puts out a report on different recreational activities. On the low end, 40 million people a year paddle twice a year. That’s big. And there are not enough people servicing that demand. It is putting pressure on areas where ecotourism is seemingly a good thing. We don’t have enough venues to provide it; you can hurt these areas by sheer volume.”

Paddlers tend to have a lot of crossover participation in other active, outdoor activities, such as biking, walking, fishing, camping, and hiking. Top motivations for paddling include relaxation, exercise, fun, exploration, health, new experience, escape from usual routine, challenge, available near home, feeling of accomplishment, and spending time with friends. Canoeing and kayaking are the most popular paddling sports.

According to 2009 data, over 55% of paddlers are male and 65% are from an urban area. The largest age group participating in paddling sports overall is age 25 – 44, and the second largest group overall is age 45+. The largest age groups participating in kayaking are age 25-44 (36%) and age 45+ (30%). The largest age groups participating in canoeing is age 25-44 (34%) and 45+ (28%). The average number of outings per paddler is 10. Most paddlers have been participating for 5 or more years. Over 60% of paddlers own their own equipment. Only 2.5% of paddlers are members of a paddling club or organization. Over 6% of Americans participated in paddling in 2008 – 17.8 million individuals and 174 million paddling outings. Paddling is increasing each year. In the last year, participation in recreational kayaking grew by 27 percent. In the last 3 years, participation grew by 32 percent.

Economics of paddling
Research about the economic impact of river paddle trails located in North Carolina shows:

- Water trails are a rapidly growing element of the marine recreation and tourism industry.
- In the eastern North Carolina region, the coastal plains water trail system produces 2.4 percent ($55.14 million) of tourism economic impact.
- Paddlers will spend between $27 and $63 per day. A destination paddler on a multiple day water trail trip will spend about $88 in a community.
- In 2008, paddlers in North Carolina spent $270,075 on local paddling trips and $947,800 on non-local trips.
- Paddlers spent an average of $144 per party on their last local trip and an average of $503 dollars per party on their last non-local trip.

**References**

38 Ibid.
Paddle trails do require some infrastructure to be successful. This includes both hard infrastructure (including roads, airports, lodging facilities, trails, etc.) and soft infrastructure (such as trail maps, accessible information on heritage and culture, ground operators/outfitters, and training programs for guides, local people who come into contact with tourists, interpreters, ecododges, etc.).

**Paddling-related Experience and Opportunities in the Lower Mississippi Region**

Paddling information in the region is limited to Mississippi and Louisiana, based on data collected and conversations undertaken by grantees in those states. The two other grantees have limited data about paddling at this time.

**Mississippi**

In western Mississippi, according to Meg Cooper of the Lower Delta Partnership, “there is an increased interest in paddling as a whole and kayaking in particular.” While regional data shows that paddlers tend to be younger, those in the Mississippi Delta region tend to be closer to middle age. Demand for paddling in this area seems to come from educated, middle aged, white, middle class people (more male than female) mostly from outside the area. In this area, there is very little infrastructure available, including few boat ramps and very few outfitters. The vision for paddling in this area, according to Cooper, is “Increased outfitters, literature available with mapped paddling trails, increased interest in waterways and conserving them. We also want to grow the paddling experience through additional signage and mapping.”

Interviews with potential aggregators (John Ruskey of Quapaw Canoe Company and Bill Seratt of the Vicksburg Convention and Visitors Bureau) revealed an interest in offering Mississippi River tours, Sunflower River tours, and increasing development of interpretation and interpretive materials on nature related outings.

**Louisiana**

Paddling in northeastern Louisiana is growing. Dora Ann Hatch at LSU AgCenter is finding that paddling is more prevalent in urban areas. Paddlers in this area are of all ages, but predominantly young professionals and those active in paddling clubs. Most paddle in lakes; many are involved in clean-up campaigns on waterways. According to a survey by the Louisiana Department of Culture, Recreation and Tourism released in 2006, the total number of visitors to all facilities operated by the Office of State Parks was over 2 million, of which about half were overnight visitors and half were daytrippers. LSU AgCenter’s vision for paddling in this area is that northeastern Louisiana will become known as a paddling destination, increasing opportunities for other forms of tourism including natural, cultural and historical.

Interests in this area include guided paddling trips, blending archeology and paddling, blending storytelling with paddling, paddling classes, paddling from public to private lands, “Swamp People” experiences, and theme based paddling trips. According to Debra Creduer of the Atchafalaya Heritage Area, paddling is a niche market, which supports sustainable, cultural and natural resources by providing economic opportunities. People who come for paddling will also take advantage of cultural activities in the area, nature based tourism, ecotourism, etc.

Paddling aggregators may include churches, women’s clubs, boy scouts, girl scouts, 4-H school groups, college groups, continuing education classes, naturalists, yoga enthusiasts, artists, state police, military and business people. John Ruskey is the owner of Quapaw Canoe in Clarksdale, Mississippi, who is a visionary
when it comes to paddling the Mississippi River and its tributaries. Ruskey believes that paddlers like music, so there may be opportunities to add musicians to paddling offerings, or to add other music related destinations to a paddling trip.

**Outfitters**

Quapaw Canoe Company is one of the only outfitters in the area. John Ruskey of Quapaw Canoe focuses his business on the voyager style of canoes. John is interested in the superior design of birch bark canoes, which are active on the Great Lakes and Lake Champlain. He has been in business for 15 years. According to Ruskey, “We can’t keep up with the outfitting. If you look at our website (island63.com) and our calendar, you’ll see that we are solidly booked for the next two months.”

Quapaw would not survive if people were not coming from outside the State of Mississippi. About half of Quapaw’s clients come from the local area (through families, church groups, school groups and friends), a quarter come from the coasts and northern states and Montana (through the Missouri River connection), and the remainder from overseas (Eastern Europe, Australia, Africa, East). The mystique of the Mississippi River for foreign visitors is similar to that of the Grand Canyon, according to Ruskey. This mystique is something to build on to attract not only foreign visitors but also those domestic visitors that have not experienced this national treasure.

Quapaw’s marketing strategy revolves around its extensive internet presence. Quapaw is also lucky to have good publicity. John gets most of his business through repeat business, word of mouth and internet visitation. His business is a completely custom outfit, with radically different trips. Sometimes he might take 10 people on the river; other times he may do multi-day or weeklong trips. He’s taken people all the way to the Gulf of Mexico.

Ruskey guides 1,000 people each year on the water. He finds that cross-country travelers may come to Clarksdale to experience the blues and then add a paddle. Sometimes in one single day an activity like the National Park Service’s Summer of Paddling will bring 250 people to paddle the river. Quapaw serves the Lower and Middle Mississippi, from St. Louis, Missouri down to the Gulf. Quapaw will paddle any Lower Mississippi tributary, including the Big Yazoo, White River, and Arkansas River. He leads trips down the Atchafalaya, which is a World Heritage Site. Partnerships with educators, scientists, conservationists and other outfitters have worked for Quapaw by creating demand for Quapaw’s offerings.

John is also involved with the saving of Buck Island and the creation of public places on the river. He has contributed to the creation of a paddlers guide to the Lower Mississippi Water Trail, which was recently published online at rivergator.org. This is one component of a multi-pronged approach through the Lower Mississippi River Commission, which was started two years ago. The website brings up detailed descriptions of the first 100 plus miles of this water trail.

**Paddling Events and Races**

Tim McCarley is the organizer of the BluzCruz Kayak and Canoe Race. According to Tim, “I see more and more people all the time [on the river].” The BluzCruz included over 100 paddlers last year from eight states. According to Tim, the paddling crowd is older and has money. 42

There are several other paddling events in the Lower Mississippi River states including:

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Outdoors Inc. Kayak Race - Nation’s oldest kayak sprint race – Memphis – 200-600 participants.

Phat Water - 120 participants.

Battle on the Bayou - 200-300 participants.

Arkansas Canoe and Kayak Race - Little Rock – 50-60 participants.

Infrastructure and Service Gaps and Resources to Create and Meet Additional Demand for Paddling

There are several gaps in the region that need to be filled to meet growing demand for paddling. Gaps include a lack of lodging and dining options as well as equipment and support outfitters (shuttle drivers, etc.) and guides.

Lodging and dining are gaps that are found in all nature-based tourism subsectors; recommendations around those are found later in this report. There is a particular type of lodging that was mentioned by John Ruskey as a need for paddlers: dorm style accommodations for those participating in multi-day trips. This may be an opportunity to work with those interested in alternative forms of lodging to develop lodging at strategic points along the river. Daryl Jones of Mississippi State University runs the Natural Resource Enterprise (NRE) program, which provides training and outreach to those who are interested in developing natural resource-related businesses, whether agritourism operations, hunting leases, nature trails, or wildlife habitat management guides. Jones and his NRE program may be useful in engaging potential landowners in developing paddling accommodations, outfitter or guide businesses.

The need for outfitters is specific to paddling. John Ruskey is challenged to find guides. An outfitter provides gear and material necessities for an outdoor excursion. A guide shares their knowledge with a group or individual and may help plan routes or lead a trip. Any future movement in this area, for example to create additional outfitters or develop a training program for guides, should include John’s expertise and perspective. An outfitter has to be driven in this atmosphere; it can take 1-2 years to build up a business. It has taken John Ruskey 10 years to get where he is. “We survived because of my passion for the river and ability to keep low overhead. That’s the reason there aren’t more outfitters.” There are towns that are interested in recreation on the river. In the past five years, two Mississippi River towns have asked him about establishing an outfitter. John has helped to do this in Helena, Arkansas, and he believes it can be done in any of the river towns (Memphis, for example). An outfitter may simply be renting canoes, but there is education and liability around this activity. One Heritage Area manager suggested a tax credit program to assist businesses in the Heritage Area; this type of assistance may be helpful for outfitters wanting to get started. It may make sense to investigate other incentive programs for helping outfitters to get started.

There are also issues around having access in the right places (which can often be on private land), as well as a lack of defined and mapped trails. More uniformity of paddling information across individual states and across the region is also needed. To this effect, John Ruskey has been working with Walton grantees along the Lower Mississippi River to define and map trails in a more uniform and consistent manner, such as with Dora Ann Hatch of the LSU AgCenter and with Meg Cooper of the Lower Delta Partnership. Ruskey’s expertise in defining and mapping trails is invaluable. However, this expertise needs to be further developed, so that John Ruskey is not called upon in every situation. The Heritage Areas, state parks, state forests, and other public land managers can be a resource in developing and providing consistency to paddling marketing, outreach and opportunities. Those interested in paddling in the region may want to consider working together to provide consistent information in terms of marketing their paddling opportunities, whether through brochures, maps, websites, marketing, itineraries, etc.
Efforts to market the region should build on the mystique of the Mississippi River for foreign visitors mentioned by John Ruskey. This mystique is something to build on to attract not only foreign visitors but also those domestic visitors that have not experienced this national treasure. Potential resources identified include the newly formed Mississippi Water Trails groups that can provide increased attention to paddling, possibly creating interest by potential outfitters, shuttle drivers, rentals, etc.

The American Canoe Association may also be a resource for expanding paddling opportunities in the region. Wade Blackwood, Executive Director of the American Canoe Association (ACA),\(^{43}\) thinks that promotion of paddling tourism along the Mississippi River is a unique opportunity and can be a great teaching platform for a number of initiatives to promote safe boating. ACA\(^{44}\) is also one of the only organizations that provides insurance to outfitters. As a member of ACA, an outfitter is able to acquire inexpensive insurance. ACA is skilled at teaching paddling skills and paddling safety. There are 6,000 ACA instructors around the US. ACA can educate and provide technical support to a Lower Mississippi River paddling initiative in addition to insurance for potential outfitters. ACA can also promote different paddling tourism and recreation opportunities through its magazines and its website.

The attitudes of locals toward the river also need to be addressed. Ruskey says, “Part of the challenge in the Lower Mississippi is helping the people who live here see the value of the outdoor landscape in a new way. This is a simple block but a huge one that is difficult to overcome.” According to John Ruskey, ninety percent of locals tell people not to go on the Mississippi River. Ruskey explains, “That’s the paradigm shift that will have to change…. Fear of the river.” There is a need to steer understanding and perception in a different direction. John Ruskey has been working toward overcoming this obstacle through 75 percent education (writing, talking, working with kids, etc.) and 25 percent spending time on the water. John runs an apprenticeship program for Mississippi Delta youth; this is a 15-year-old apprenticeship program, in which 12-18 year olds learn to build canoes, paddle canoes and guide people on tours of the Mississippi River. Quapaw’s apprentices eventually become guides. “Education is the key. Youth is an obvious place to start… get past the parents. This is a pretty wholesome and integrated thing. It’s worked with the KIPP School in Arkansas. As a school, it’s working for us because their education system demands participation of the parents. It has worked with individual families and the apprenticeship in Clarksdale. It has worked with ‘bad kids’ who find a place with us.” This is a great model of engaging youth in connecting with the river, thereby influencing their families and others, as they begin to establish their own outfitting operations. Engaging the pilots and other groups interested in paddling in public relations and experiences for locals on the river could help turn this perception around.

Potential resources identified that may be helpful include the newly formed Mississippi Water Trails group that can provide increased attention to paddling, possibly creating interest by potential outfitters, shuttle drivers, rentals, etc.

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\(^{44}\) The ACA is interested in the educational side of paddling; it’s the only organization that offers certification for entry level paddlers to elite paddlers in all disciplines, and even has an adaptive paddling program for those with disabilities. ACA teaches sustainability in paddling; they have a large stewardship department. There are many marine debris issues that play a part in paddling safety; ACA makes sure that that is part of the education they provide, being a responsible paddler. ACA conduct events for stewardship and clean-up of waterways, which gives them an opportunity to promote themselves. Their members include a network of clubs and paddling organizations all around the country; they have instructors and members in all states.
Models

There are a variety of potential models to consider in developing paddling opportunities along the Lower Mississippi River. It may be possible to create a Lower Mississippi River Blueway. Water trails, or blueways, embody the nexus between rivers and trails. They provide recreational boating opportunities along a river, lake, canal or coastline; most water trails are managed in public-private partnership with the philosophies of environmental stewardship, environmental education, and accessibility for all users. The National Park Service has helped communities create water trails nationwide for almost two decades. There are many resources available about how to develop a blueway, including those from the National Park Service (http://www.nps.gov/ncrc/portals/rivers/projpg/watertrails.htm).

The Mississippi River Blueway, managed by Jon Summers of the Army Corps of Engineers, is one good model.

**Mississippi River Blueway**

Jon Summers\(^{45}\) is a Natural Resource Specialist with the U.S. Army Corps of Engineers in the St. Louis District. Jon is developing a blueway on the Mississippi River in this district. The blueway is 120 river miles within the controlled sections of the river. His plans include taking it down to Cairo in the open section of the river, which is more similar to what is found in the Lower Mississippi. Eventually the water trail will run 300 river miles from Saverton, Missouri to Cairo, Illinois. A Mississippi River Water Trails Association has also been started along the trail.

The beginning came as Jon noticed more and more people asking where they could paddle, where they could put boats in and whether or not getting on the river was safe. The U.S. Army Corps of Engineers manages 300 miles of the Mississippi River; St. Louis is right in the center. There is a canoe and kayak club with about 300 members; Jon went to this club first because he figured they were in touch with the paddling community. The Corps came up with a conceptual plan that was presented to the community and modified through collaboration. “We wanted to make it the public’s trail. We got a lot of positive feedback from the community. We listened to the community.” This was collaboration between the Corps in Mississippi and Illinois and the National Park Service, but the driving force was the canoe and kayak club. The first section was dedicated in 2005.

The Corps was lucky to be able to put the trail on public property — state, city or county land that made it easier, with less liability issues, through easement or lease agreement. The Corps will be pushing to work with the American Land Conservancy.

In the 120 mile section completed from St. Louis north, there are three outfitters, an REI, a couple of local vendors/outdoor stores, Cabela’s and Bass Pro Shop. There are four locks and dams within the 120 mile section. The region is heavily involved with navigation and the towing industry. The last site ends at the gateway to the arch in St. Louis. Lodging is not provided, but there is lodging information on the brochures. There are campsites available mainly on islands owned by the Corps. Because of the flooding issues associated with the river, there is a need to maintain minimal infrastructure on the river. The sites along the trail are basically signs that provide information and a contained fire pit. Access areas are gravel parking lots with pit toilets. Some of the sites are located in towns where people can go into town and purchase supplies for a trip.

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The Corps manages the trail and completes most maintenance. St. Charles County Park has a gravel parking lot that is maintained by the County. A volunteer base provides assistance on maintenance. Their partners and volunteers come and help out.

No visitor data has been collected yet. People use the trail year round unless it’s iced over. Whenever a community is having a festival or event, the Corps tries to tap into that in order to get paddlers out onto the trail. Marketing is done by brochure; each pool (stretch between lock and dam) has its own brochure. Around 2009, the Corps went back and renumbered the trail system, hoping that as other sections came on board, it could be one trail. Social media is also being used to market and promote the trail. The Mississippi River Water Trail Association was developed to acquire grants, funding, etc. As a government entity, the Corps cannot be in competition with the private sector. Collaboration is the key; this is a collaboration between the Corps, St. Louis Canoe and Kayak Club, Mississippi River Water Trail Association, state agencies, U.S. Fish and Wildlife Service, National Park Service. The trail also collaborates with Convention and Visitors Bureaus and the Sierra Club. The Water Trail Association meets once a month; all the groups mentioned would be a part of that association.

Jon is interested in being involved as the trail expands south from Cairo, Illinois, as he believes there is a great deal of interest. Illinois Fish and Wildlife would like to be involved also. The ultimate goal is to make one trail for the entire 2400 miles of the river with consistency from the headwaters to the Gulf. According to Jon, the paddling community is interested in this as well.

**Other Models**

**Trail Towns**
Kentucky has another interesting model, called Trail Towns.46 The goal of Trail Towns is to transform more than 30 Kentucky towns into gateways to the state’s trails and rivers in an effort to boost local tourism spending. As part of the program, the state will advise towns on developing links to nearby trails and rivers, or on building new trails. Then the state will help promote the communities and their businesses, by helping communities develop signs directing hikers and others to local services and attractions, so that outdoor enthusiasts will know what is available, and the community can benefit from tourism spending locally. The first Trail Town, Livingston, has already benefited from tourism-related businesses opening in town or nearby as a result. Other regions have Trail Town programs, including the Great Allegheny Passage (from PA to MD) and the North Country Trail, which is a 4,600 mile trail through seven northern states from North Dakota to New York.

**The National Water Trail System**
The National Water Trail System is another model, which was established to protect and restore America’s rivers, shorelines, and waterways and conserve natural areas along waterways, while also increasing access to outdoor recreation on shorelines and waterways. While national scenic trails and national historic trails may only be designated by an act of Congress, national recreation trails (including national water trails) may be designated by the Secretary of the Interior or the Secretary of Agriculture. Long water trails include two along the upper Mississippi River: the Mississippi River Water Trail (121 miles from Illinois to Missouri – mentioned above) and the 72 mile long Mississippi National River and Recreation Area Water Trail in Minnesota. A longer water trail, the Alabama

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Scenic River Trail includes stretches of seven rivers, two creeks and one bay and moves through a variety of historical and cultural areas. The Kansas River Trail follows the Kansas River for 173 miles through remaining tallgrass prairie ecosystems.

**Economic Potential of Paddling for the Target Region**

Based on the assumption that paddlers spent an average of $144 per party on their last local trip and an average of $503 dollars per party on their last non-local trip, if these gaps can be filled and obstacles can be overcome, there is significant economic potential to be realized. Every 1,000 additional paddlers in the Lower Mississippi River region would mean an additional $144,000 to $503,000 to the region in expenditures, depending on whether they were local or non-local.

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Cultural/Historical

Cultural/historical tourism is concerned with the culture and history of a specific region or country. It basically focuses on the traditional communities that have diverse customs as well as the forms of art and the distinct social practices that distinguish a certain culture. In some regions, the history of the Civil War, slavery and civil rights are every bit as important as the music, art and food. In many instances, the history of a particular region has driven the cultural elements.

Cultural/historical tourism is available in urban areas, including visits to facilities like theaters and museums, and rural areas, which showcase the traditions of the indigenous cultural communities like festivals and rituals, as well as personal values and lifestyle. Generally, cultural tourists spend more than the standard tourists do, since they usually travel to multiple cultural and historical sites.

National Trends

A 2009 study of U.S. Cultural and Heritage Travel reveals that 78% of all U.S. leisure travelers participate in cultural and/or heritage activities while traveling, translating to 118.3 million adults each year.

Cultural and heritage travelers as a whole are more frequent travelers, reporting an average of 5.01 leisure trips in the past 12 months versus non-cultural/heritage travelers with 3.98 trips. They are also more frequent business travelers and are more likely to have taken an international trip in the past 12 months than their non-cultural/heritage counterparts. More than half of cultural/heritage travelers agree that they prefer their leisure travel to be educational and nearly half said they spend more money on cultural and heritage activities than other activities. They are also likely to travel farther to get the experiences they seek: about half of most recent overnight leisure trips were 500 miles or more from home. More than a third said they traveled between 100 and 300 miles for a day trip.

The study found that cultural and heritage travelers are more likely than other tourists to participate in culinary activities, such as sampling artisan food and wines, attending food and wine festivals, visiting farmers’ markets, shopping for gourmet foods, and enjoying unique dining experiences as well as fine dining.

Other cultural and heritage activities identified by travelers include visiting historic sites (66%); attending historical re-enactments (64%); visiting art museums/galleries (54%); attending an art/craft fair or festival (45%); attending a professional dance performance (44%); visiting state/national parks (41%); shopping in museum stores (32%); and exploring urban neighborhoods (30%). The vast majority of these travelers (65%) say that they seek travel experiences where the “destination, its buildings and surroundings have retained their historic character.”

The demographics of historical/cultural tourists follow:

- **Average Age:** 49

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49 National Trust for Historic Preservation. Cultural Heritage Tourism. [http://www.culturalheritagetourism.org/resources/visitorProfile.htm](http://www.culturalheritagetourism.org/resources/visitorProfile.htm)
- Likely to be retired: 20%
- Likely to have a graduate degree: 21%
- Travel longer: 5.2 nights average length of stay
- Main purpose of trip: Leisure/recreation, visit friends or relatives, business, convention or conference, studying or teaching.

Cultural heritage tourism is based on places, traditions, art forms, celebrations and experiences that portray and reflect the diversity and character of the United States. Cultural tourism activities include: art galleries, theater and museums, historic sites, communities or landmarks, cultural events, festivals and fairs, ethnic communities and neighborhoods, architectural and archaeological treasures. 78% of national vacationers who participated in heritage and cultural activities accounted for 90% of the economic impact of domestic tourism. 50

**International Travelers**

In 2011, the U.S. Department of Commerce released its first Cultural Heritage Visitor (CHV) Profile51. The CHV profile showcases select characteristics of overseas visitors who participated in one or more of the following activities: art gallery/museum, concert/play/musical, cultural heritage sites, ethnic heritage sites, American Indian community, historical places, and national parks.

According to the CHV Profile, the United States welcomed nearly 15.4 million overseas cultural heritage travelers in 2010, outpacing the average growth of all overseas arrivals to the United States (14% and 11%, respectively). Since 2004, the number of travelers participating in CHV activities has increased from 10.6 million (68.7% of the market) to the current 15.4 million, or 71.2 percent of all overseas visitors.

Visitors from Europe dominate this market, with almost 56 percent of all European travelers stating they participated in CHV activities while visiting the United States, followed by Asia (19%) and South America (13%). The top countries interested in cultural heritage related activities are: Brazil, France, Germany, Japan, and the United Kingdom. Among the top destinations visited by CHV travelers, the share was higher for: New York, California, Nevada, Massachusetts, and Illinois. Among the top cities, the CHV share was higher for: New York City, Los Angeles, San Francisco, Las Vegas and Washington, DC. 52

CHV travelers take longer to plan their trips and book their flights earlier than the average overseas visitor. They tend to be more first-time travelers, stay longer in the United States, and visit more destinations than the average traveler.

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50 National Trust for Historic Preservation. Cultural Heritage Tourism. [http://www.culturalheritagetourism.org/resources/visitorProfile.htm](http://www.culturalheritagetourism.org/resources/visitorProfile.htm)
52 Southern cities and states are not major destinations when compared with the rest of the United States. Texas garners 3.4% of visitor market share, and Georgia garners 2.5% of visitor market share, compared with the highest state, New York, with 46.8% of visitor market share. Source: 2010 Industry Sector Profile: Cultural Heritage. U.S. Department of Commerce. [http://www.tinet.ita.doc.gov/outreachpages/download_data_table/2010-cultural-heritage-profile.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/2010-cultural-heritage-profile.pdf)
Economics
Cultural and heritage travelers spend an average of $994 per trip and contribute more than $192 billion annually to the U.S. economy. Helen Marano, Director, Office of Travel and Tourism Industries, U.S. Department of Commerce explained, “With 78% of all domestic leisure travelers participating in cultural and heritage activities, their expenditures confirm that this is a strong market, and they are contributing significantly to our communities during these challenging economic times.” The segmentation analysis uncovered five different types of cultural and heritage travelers: Passionate, Well-rounded, Aspirational, Self-Guided, and Keeping it Light. Three segments – Passionate, Well-rounded, and Self-guided – were more serious about their travels and said that cultural and heritage activities had a greater impact on their destination choice. Together, these three segments represent 40% of all leisure travelers and contribute nearly $124 billion to the U.S. economy. These travelers are affluent and travel frequently.

Additional data about economic impacts from visitation to Civil War sites shows that there is significant impact from Civil War tourism in the states of Missouri, Pennsylvania, South Carolina, Tennessee and Virginia National Park Service affiliated Civil War battlefields and historic sites.

- 15 million visitors
- $147 million in income/wages
- 7,700 jobs supported
- $230 million in value added (rents and taxes, etc.)

Regional Trends and Activities Related to Cultural and Heritage Tourism
The four states of the Lower Mississippi River region – Arkansas, Mississippi, Louisiana and Tennessee – have a wide variety of historical and cultural tourism opportunities including Civil War and Civil Rights attractions, blues music, culinary traditions, and more. The target region discussed in this report encompasses parts of these four states – western Mississippi, eastern Louisiana, eastern Arkansas, and western Tennessee.

Mississippi
Mississippi is home to more award-winning writers per capita than any other state, a wide variety of music history, examples of three centuries of American architecture, rich culinary heritage and is home to some of the most important sites of the Civil War and the Civil Rights movement. For example, the Vicksburg National Military Park had 772,977 visitors in FY07, a 44.9% increase from FY06. The Civil War Sesquicentennial was marked in 2011. Preserve America awarded a grant to Vicksburg, Raymond, and Port Gibson. And the Mississippi Division of Tourism and Mississippi Department of Archives and History are developing a new driving tour of the state.

According to Meg Cooper of the Lower Delta Partnership, there is a “huge interest” in cultural/historical tourism and currently a large increase in Civil War tourists due to the sesquicentennial, including an increase in locals taking day trips to nearby historical/cultural sites. Assets in the Mississippi Delta include tourism around literature, historical homes, battle sites, blues trail markers, festivals, the Great Delta Bear Affair, the Deep Delta Festival, prehistoric Indian mounds, Mont Helena, Vicksburg Battlefield Park, and the Onward Store. Current tourists in this sector include middle to older middle-aged couples and individuals who tend to be more educated and from a higher economic bracket with the exception of blues tourists, who tend to be from foreign countries. The vision of the Lower Delta Partnership is to have tour itineraries for visitors, more interpretive signage, tour guides, as well as lodging and dining opportunities. Based on conversations with a variety of contacts, it’s clear that those interested in promoting historical/cultural tourism want more marketing materials for the area, possibly a familiarization (FAM) tour (a free or reduced-rate trip offered to travel professionals to acquaint them with a destination or attraction), increased development of nature related sites, more live music performances, more children’s activities, greater partnership to leverage funding and increase reach, more bed and breakfasts, more information on the Teddy Roosevelt - Teddy Bear connection, and more river access. In Mississippi, cultural and heritage tourists spend more money than other types of tourists: $623 per person per trip, compared to $457 per person per trip for other travelers. 57

Arkansas
Arkansas is home to heritage trails documenting Arkansas’s history and heritage, which is deeply rooted in its landscape. History trips across the state can lead from Mississippi River bottomlands to mid-America’s highest peaks or from a legacy of Deep South cotton culture to a town on the edge of the Wild West frontier. Arkansas’ heritage trails document land and water routes along the Arkansas Trail of Tears, the Butterfield Overland Trail mail route pre-dating the Pony Express, the Southwest Trail in Arkansas and Arkansas Civil War actions.

Delta Heritage Tours, organized out of Helena and run by Munnie Jordan 58, services riverboats with shore excursion tours (including agricultural tours, sacred spaces tours, and Heart and Soul tours). The American Queen riverboat will be stopping in Helena 22 times next year and holds 400 people, of which 100-150 typically take the tour each time. These cruises run year-round. The Queen of the Mississippi riverboat will come 20 times next year with 150 people each time. And the Yorktown riverboat holds 100.

58 Personal communication. Munnie Jordan. Delta Heritage Tours, Mississippi River Trail, King Crimson Blues Festival. 870-338-8972.
The King Biscuit Blues Festival, also organized by Munnie Jordan, is another draw to the area. There are normally 10-12,000 residents in Helena; when the
festival is happening, there are 50-60,000. This festival is always on Columbus Day weekend and features three days of music across five stages. The festival is
advertised through the Memphis Convention and Visitors Bureau, Mississippi Tourism, Arkansas Tourism, TV, radio, magazines, and billboards. Then there is
Bridging the Blues, in which all four states put on their own events and festivals leading up to the King Biscuit Blues Festival.

In Arkansas, the Historic Preservation Alliance of Arkansas\textsuperscript{59} is the only statewide nonprofit organization focused on preserving Arkansas's architectural and
cultural resources. The Alliance plans one very unique heritage tourism event, a ramble, where the Alliance maps out a route and takes a bus of people around
the state. It is typically organized around a theme, showing historical and cultural sites along the way. It is very well received, fun and educational. The cost to
rent a bus has been an impediment in being able to reach a wider audience because it raises the cost of local participation.

\textit{Louisiana}

Louisiana is home to historic architecture, music and more. Blues music is a particular draw in this area of Louisiana and throughout the Lower Mississippi River
Corridor. Groups tend to tour cultural tourism destinations in association with education, business or pleasure trips. School groups are one particular market, as
these groups visit cultural attractions to learn about their heritage. Parents visiting college students often take advantage of cultural amenities in the area. The
most popular attractions in northeastern Louisiana include Poverty Point Historical State Park, the Louisiana Cotton Museum, Frogmore Plantation, Chennault
Aviation and Military Museum of Louisiana, and the Biedenharn Museum and Gardens, but others include Black Bayou Lake National Wildlife Refuge, Coke
Museum, Northeast Louisiana Children’s Museum, Masur Museum of Art, Landry Vineyards, University of Louisiana at Monroe Natural History Museum, Starr
Homeplace, Jim Bowie Relay Station, Delta Museum, Winter Quarters Historic Site and Ike Hamilton Expo. Festivals include the Catfish Festival in Winnsboro and
the Jim Bowie Festival in Vidalia.\textsuperscript{60}

Tourists are coming to northeastern Louisiana from Jackson, Mississippi and Greenville, Mississippi all the way up to Memphis, Tennessee and southern
Arkansas. Those coming for historical/cultural tourism are typically more educated. Local aggregators include bus groups, religious tours, universities,
conventions and sports markets. The Monroe area in particular is trying to reach larger cities; shopping is a draw.

\textit{Tennessee}

Tennessee's Civil War Heritage Area (which covers the entire state) is just one of many historic and cultural attractions in Tennessee, which also includes wine
trails, art trails and more. There is also a river trail system – Tennessee River Trail, heritage areas, and historic sites. Authentic and cultural amenities are
significant draws; Memphis has over 60 known attractions with over one third labeled as cultural and unique. Musical history venues, educational exhibits and
museums are of high quality (Stax/Soulsville, Rock and Soul Museum/Smithsonian exhibit, Pink Palace, Graceland and Sun Studios). There is a large inventory of
“stories” about the history and folklore of the region. The rural communities have excellent small and medium sized museums for diverse educational
opportunities. There are significant Civil War sites with national trail promotions (multi-state). There are historic and unique downtown Court Squares for

\textsuperscript{60} The Official Tourism Site of Louisiana. http://www.louisianatravel.com/
shopping and dining. The greatest trend and opportunity, according to Diana Threadgill and Glenn Cox of the Mississippi River Corridor- Tennessee, is an emerging new leisure travel trend known as experiential travel; more than four out of ten travelers are participating, particularly in rural areas. 

Gaps

There are shared gaps across the four states that seem amenable to shared solutions. Contacts want stronger broadband capabilities in the region, more use of travel technologies, more developed itineraries for visitors, more interpretive signage and tour guides, more marketing (internet and maps/brochures) and materials that promote the area, increased cross marketing with outdoor activities, a better mix of lodging and dining options, more ferries across the river, and a greater appreciation of local cultural and heritage assets by the local population. Recognizing the links between cultural and heritage tourism, contacts also want more river excursions, biking trails, more farm and agricultural tours, a craft/artisan cooperative, waterpark, hiking and biking trails on the levee, bayou tours, nature tours, paddling tours, horse drawn carriages on the riverfront, and more.

There is a need for greater partnership to leverage funding and increase reach. In addition, in rural areas, there is a further obstacle in that attractions are spread out and not easily accessible, providing a disincentive to visit them. In some states, improved collaboration between state agencies could help promote more heritage resources and natural resources. As with paddling, there is also a need to find cost effective ways to address the experience and knowledge gaps among the local population.

In addition, there are gaps specific to a particular area that would benefit from local attention and local solutions. For example, one gap noted by LSU AgCenter specific to eastern Louisiana is the lack of a large conference hotel to attract large conventions. While this area has diverse lodging options, these hotels are typically busy during the week (when conferences take place) and empty on the weekends.

Another specific desire noted by the Mississippi River Corridor – Tennessee is for more educational opportunities through academic institutions and other non-profit organizations for programming, outings and specific curriculums for experiential tourism, which is a focus for western Tennessee. This would require them to begin to make connections with Tennessee academic institutions and nonprofits and even those outside of Tennessee. MRCT is already beginning to do this.

Interests in the Lower Delta Partnership area in Mississippi include a familiarization or FAM tour, more live music performances, more children’s activities, and more information on the Teddy Roosevelt - Teddy Bear connection. There is a very specific need to have more extensive staffing for their visitors center, which is currently only staffed by volunteers for very limited hours on three days of each week. A FAM tour, more live music performances and more children’s activities would be useful region-wide. These may be part of a larger regional strategy.

In Arkansas, there are great places, such as Dyess County, Johnny Cash’s boyhood home, that are not always equipped to be tourist destinations. According to Vanessa Norton McCuin, the Alliance’s Executive Director, “the town does not even have a place to buy a coke. Infrastructure to support tourism industry is not in these places that have great attractions.” There is a need for hard and soft infrastructure to provide the amenities that tourists expect. This may be part of a region-wide strategy of making sure that there is sufficient infrastructure to make tourists comfortable.

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One specific gap noted for Arkansas relates to their ramble, in which transportation cost has been an impediment to reaching a wider audience. While this gap is specific to this part of Arkansas, there is universal interest in engaging local people in tourism experiences that will open up their minds as to what’s available and what’s fun. Having people appreciate their own hometowns and what is available in their own backyards is the first step to being able to promote their areas to tourists. A great example of success related to this is in Jamaica, where Countrystyle Community Tourism Network and their Villages as Businesses program begin working with a community by having community residents learn about their own heritage and what makes their community special. By doing this, community residents are better able to appreciate their community and project that appreciation onto incoming tourists. Further research into best practices in this regard could be beneficial to the region.

Shared gaps in this area seem to include tour itineraries, more interpretive signage, tour guides, and marketing (internet and map/brochures) materials that promote this area.

**Recommendations and Resources**

Each of the four states holds pieces to the puzzle of a satisfying cultural and heritage tourism experience. We recommend engaging historic preservation contacts in each of the four states in a discussion about how best to work together to create coherent stories about this region. It may also make sense to engage Chambers of Commerce, Convention and Visitors Bureaus, and communities in this work. The historic preservation contacts we spoke with saw the potential for working together and creating economies of scale in the region. A group like this could help to secure and leverage funding. In addition, since historical/cultural tourists are also likely to take advantage of natural resources, it makes sense for those state agencies in charge of state parks and natural resource areas to collaborate with those agencies in charge of historic preservation.

A region-wide approach may be helpful in addressing shared gaps in lodging, dining, tour itineraries for visitors, interpretive signage, tour guides, marketing (internet and map/brochures) and promotional materials. There is a need for greater partnership to leverage funding and increase reach. In addition, in rural areas, there is a further obstacle in that attractions are spread out and not easily accessible, providing a disincentive to visit them. More collaboration between silo agencies within and across states could help promote connections between cultural and heritage resources and natural resources-based recreation.

There are interesting themes in this region that may provide strategies for all parts of the region. These include culinary trails, literary heritage, music heritage, civil rights history, and the region’s Civil War history, which is particularly timely given the Sesquicentennial.

The Preserve America program, a federal initiative that encourages and supports community efforts to preserve and enjoy our cultural and natural heritage, is another potential resource for the region around the marketing of heritage tourism; while the funding may have dried up, the techniques, models and practices may be useful ones to replicate in the region.

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Models

*Southern Literary Trail*[^63]

There are some interesting models in the area of historical/cultural tourism. Close to home there is the Southern Literary Trail. The Southern Literary Trail connects southern places in Alabama, Georgia and Mississippi that inspired great American writers to create classic fiction and plays. Every two years, the Trail's organizers host Trailfest, the only tri-state literary festival in the United States with free events, theatrical performances and heritage tours. The Trail also features writers’ houses; the homes of classic fiction writers from the South of the 20th Century have been preserved for visitors to see how they lived. Writers featured include Tennessee Williams, Eudora Welty, Walker Percy, Richard Wright, Margaret W. Alexander, Borden Deal, and William Faulkner. Landmarks that inspired writers – courthouses, parks, churches, stores, banks – have been saved for contemporary readers to enjoy as settings for festivals and tours. In April 2005, the Fitzgerald House in Montgomery – a home for Scott and Zelda – hosted the first meeting of Southern Literature enthusiasts, festival organizers and museum directors from Alabama, Georgia, and Mississippi to begin work on the Southern Literary Trail, a project uniting homes of writers and literary landmarks into one tri-state pathway. The Trail's organizers dedicated three years to meetings in each state for making the difficult choices of the writers and the destinations that would be right for this unique collaboration, a map of novel journeys stretching from Natchez to Savannah.

*Southern Foodways Alliance*[^64]

The Southern Foodways Alliance is also active in the target region. The Southern Foodways Alliance (SFA) was formally founded in 1998, under a parent organization at the University of Mississippi, The Center for Southern Culture. Their goal is to disseminate their projects for popular consumption, not just academics. The oral history subjects, which many of the trails are based on, serve as a way to teach people about the larger cultural and regional story. The SFA's first documentary effort began in 2002, with funding through the National Pork Board, to document BBQ signage in Memphis, Tennessee. According to Oral Historian Amy Evans, the project quickly evolved into an oral history project, which culminated in what has become an annual October symposium. “In a broader sense, our work has done a lot to validate culinary tourism as a form of economic development,” says Evans. As part of The Tamale Trail, the SFA achieved the first culinary historical marker in Mississippi, Joe’s Tamale Place in Rosedale, which is also part of the Mississippi Blues Trail. In Mississippi, the Southern Foodways Alliance also includes a Hot Tamale Trail, Southern BBQ Trail, Southern Boudin Trail, and a Southern Gumbo Trail.

*Birmingham Civil Rights Trail*[^65]

A bit outside the Lower Mississippi River region is the Birmingham Civil Rights Trail. The Birmingham Civil Rights Institute is the centerpiece of the city's Civil Rights District. Some of the most vivid images of the turbulent 1960s were black demonstrators being attacked by police dogs and fire hoses in the streets of Birmingham, Alabama. The non-violent protesters, led by ministers including Dr. Martin Luther King Jr. and the Rev. Fred Shuttlesworth, were pressuring city leaders to overturn repressive segregation laws that divided blacks and whites. Today the battlefields trod by those foot soldiers of the civil rights movement have been turned into shrines visited by tourists from all over the world. Points of interest in Birmingham’s Civil Rights District, on the edge of downtown, are within easy walking distance of each other. Points of interest include museum exhibits, outdoor monuments and trail markers, including a statue of Dr. Martin Luther King Jr., the Birmingham Civil Rights Institute which has the jail cell where King wrote his famous “Letter from the Birmingham Jail” that urged religious

[^64]: Southern Foodways Alliance. http://southernfoodways.org/
bystanders to become active in the movement, a statue in front of the Institute honoring Shuttlesworth, pastor of Bethel Baptist Church, who endured beatings and a house bombing while a leader in the Birmingham marches. The Greater Birmingham Convention & Visitors Bureau can arrange for step-on guide services for groups who wish to tour the downtown Civil Rights District and other neighborhoods that had connections to the movement. A civil rights tour of Birmingham also could include a brunch (every second Saturday) at Chris McNair Studio & Art Gallery, a photography and art business run by the surviving daughters of Chris McNair, whose youngest (Denise) was one of the four killed at the 16th Street Baptist Church.

The civil rights trail is laid out in five districts, starting with the downtown Civil Rights District centered on Kelly Ingram Park. The Orange route will focus on marches against the city’s segregation laws, while the Blue route will commemorate protests and boycotts regarding retail hiring practices and lunch counter discrimination. A third set of downtown signs will identify churches, stores and other strategic centers.

Dr. Frank Adams gives an entertaining tour of the Alabama Jazz Hall of Fame. Kelly Ingram Park is part of the Fourth Avenue Historical District, once a thriving black retail/entertainment district and still home to many minority-owned businesses. Of special interest to tourists is the Alabama Jazz Hall of Fame, housed in the former Carver Theatre, a movie theater for blacks. Groups can request a tour guided by octogenarian Dr. Frank Adams, the museum’s former executive director, who plays his clarinet along the way. Full of stories about the glory days of jazz, he once played in Duke Ellington’s band. Eddie Kendrick Memorial Park, just down the block, honors the Birmingham native and lead singer for the Temptations, the Motown group celebrated for its fine-tuned choreography.

The Potential
There are significant historical and cultural attractions in the Lower Mississippi River region, including those related to the Civil War, Civil Rights, food, literature, and music. There are also significant gaps and challenges to overcome in making this area even more attractive to historical/cultural travelers. If we assume that cultural/historical travelers spend about $1,000 per trip, then bringing in an additional 1,000 historical/cultural travelers would mean an additional $1 million in direct spending to the region. Based on conversations with historical/cultural tourism representatives in the region, there is significant crossover between those tourists interested in cultural and heritage tourism and those interested in nature tourism. Through key informant interviews in the region, we have found that there is a real understanding that this area needs more cross-marketing between different types of tourism and specific tourism destinations, especially between historical/cultural tourism and paddling and nature tourism.

This suggests that, with solid coordination, developments in both sectors can benefit the other.
Non-consumptive Watchable Wildlife

National Trends
Wildlife watching includes birds and mammals, as well as insects, spiders, reptiles, amphibians, fish, and other wildlife. Wildlife watching is a favorite pastime for millions in the U.S. The National Survey of Fishing, Hunting, and Wildlife-Associated Recreation defines wildlife watching as participants either taking a “special interest” in wildlife around their homes or taking a trip for the “primary purpose” of wildlife watching.

There were 71.8 million wildlife-watching participants in 2011 (up from 71.1 million in 2006), nearly 23% of the US population. Of that number, 96% participated around their homes (up from 77% in 2006), and 31% participated away from home (up from 26% in 2006). Away-from-home participants are defined as those who travel a mile or more from home to engage in wildlife watching, and around-the-home participants are those who wildlife watch less than a mile from home.66

Birding
Birding is the most common form of wildlife watching.67

- In 2011, there were 46.7 million birdwatchers or birders, 16 years of age and older, in the United States – about 15 percent of the population.
- The most common form of birding is backyard birding; 88% or 41.3 million of birders are backyard birders.
- The more active form of birding, taking trips away from home, is less common with 38 percent (17.8 million) of birders participating.
- Nationally, the number of away-from-home birders has increased 8 percent since 2006 as more birders are traveling to observe birds.

Birders are:
- Older (the average is 50 years old).
- Fairly well educated.
- Better than average income.
- Slightly more likely to be women.
- Highly likely to be white.

The sparser the population of an area, the more birders there are. The participation rate for people living in small cities and rural areas was 27 percent—6 percent above the national average.

Economics
Nationally, wildlife watchers spent $55 billion on their activities, according to the 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation. As the number of wildlife watchers has increased from 2001 to 2006 to 2011, so have their expenditures. Expenditures include:

- Trip-Related Expenditures – food and lodging, transportation, other trip costs (guide fees, pack trip or package fees, public land use fees, private land use fees, equipment rental, boating costs, heating and cooking fuel).
- Equipment and other expenses – wildlife watching equipment, binoculars, spotting scopes, cameras, video cameras, special lenses, and other photographic equipment, film and photo processing, bird food, commercially prepared and packaged wild bird food, other bulk foods used to feed wild birds, feed for other wildlife, nest boxes, bird houses, feeders, baths, day packs, carrying cases and special clothing, other wildlife watching equipment (field guides and maps), auxiliary equipment, tents, tarps, frame packs and backpacking equipment, other camping equipment, other auxiliary equipment like blinds and GPS devices, off road vehicles, travel or tent trailer, pickup, camper, van motor home, house trailer, RV, boats and boat accessories, cabins, magazines, books, DVDs, land leasing and ownership, membership dues and contributions, plantings.

Figure 7: Wildlife Watchers and Wildlife Watcher Expenditures, 2001-2011

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Economics of Birding

Nationally, birding expenditures include:

- Equipment related expenditures (binoculars, cameras, camping equipment, etc.). Of the estimated $23 billion spent on equipment expenditures, 29% was for wildlife watching equipment (like binoculars, cameras, bird food, nest boxes and day packs), 3% was spent on auxiliary equipment (like tents, backpacking equipment, other camping equipment), 35% was spent on special equipment (like boats, campers, trucks and cabins), and 33% was spent on other items (like magazines, land leasing and ownership, membership dues, and plantings).

- Trip related expenditures (food, lodging, transportation and other miscellaneous items). Of the estimated $12 billion in trip expenditures, 57% was allocated for food and lodging, 35% was spent on transportation, and 7% was spent on other costs such as guide fees, user fees, and equipment rental.

Birding expenditures in 2006 created:

- 671,000 jobs
- $28 billion in employment income.
- $6 billion in State tax revenue
- $4 billion in Federal tax revenue.

Regional Trends and Activities Related to Non-Consumptive Wildlife Watching

According to the 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, in the West South Central region of the U.S., which includes Arkansas and Louisiana, 26% of the population watch wildlife around the home, and 6% watch wildlife away from home. The numbers for the East South Central region, including Tennessee and Mississippi, are 31% and 10% respectively. There were more birding participants in the South (33%), in which the Lower Mississippi Delta states are located, than in any other region of the country. According to the 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, the percentage of the population that participates in birding in each of the target region states is as follows: Tennessee – 31%; Arkansas – 28%; Mississippi – 19%; Louisiana – 15%. Compared to the US average of 21%, half the states in the target region are above average and half are below. We do not know what accounts for this difference. However, it raises a question - what can Mississippi and Louisiana learn from Tennessee and Arkansas in this regard?

Louisiana, Arkansas, Mississippi, and Tennessee each collect data on the number of days of birding activity per year by residents. These range from a low of 1.3 million days in Arkansas to 4.4 million in Tennessee. Mississippi reports 3.6 million days of birding activity by residents and Louisiana 4.2 million. Tennessee is the only state that reports days of birding by in-state non-residents (almost 2 million) and days of birding by residents in other states (about 2 million).

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88% of birding activity in Arkansas, Mississippi and Louisiana and 76% of birding activity in Tennessee appears to involve state residents, while about 12-14% of birding activity in Arkansas, Mississippi and Louisiana and 24% in Tennessee brings in people from out of state.  

**Mississippi**

There is increased interest by wildlife photographers, birders and butterfliers in the Mississippi Delta. Assets in this region include many public lands, wildlife refuges (like the Yazoo National Wildlife Refuge), forests (like the bottomland hardwoods of the Delta National Forest), wildlife management areas and privately owned lands. Current watchable wildlife tourists include photographers (who come year-round), birders (who come in the spring and fall), and butterfliers (who come in the summer). These types of watchable wildlife tourists tend to be middle-aged and better educated with higher levels of income. The Lower Delta Partnership’s vision for watchable wildlife tourism is to make wildlife watchers more aware of all the wonderful venues available for wildlife watching and photography in the South Delta. Meg Cooper, Executive Director of the Lower Delta Partnership, whom Yellow Wood spoke with, wants to know about more sites for birdwatchers and butterfliers, special events, walking trails and materials, dining and lodging places, and RV pads.

**Louisiana**

Dora Ann Hatch of LSU AgCenter reports that a locally owned store, Simmons Sporting Goods in Bastrop, recently increased its square footage to accommodate more outdoor retail items that birders would be interested in; this may be a draw for wildlife watchers visiting this region. Volunteers in this area participate in the Great Backyard Bird Count and the Christmas Bird Count. The Louisiana Ornithological Society provides a checklist by parish for birds (http://losbirds.org). As opportunities increase, the number of birders tends to increase. Birders travel in groups of 4-5 friends and often are women aged 55 and older. Birders generally make travel plans for a destination to bird. While they are there, they eat and enjoy staying in comfortable surroundings that allow for socializing, including bed and breakfasts. Trips to cultural events are not usually a part of birding trips.

The rich ecosystems created by Louisiana’s unusual terrain offer a nurturing habitat for vast numbers of birds, including both those that are native to the region and many that migrate to or through the area each year. Area state parks and wildlife refuges are perfect for birdwatching and bird photography. The Mississippi River Birding Trail Loops 1-4 are marked birding trails. Visitors come from all over the country come to the Tensas River National Wildlife Refuge (NWR) to hear of the sighting of the ivory billed-woodpecker and to hear about the bear hunt with President Teddy Roosevelt.

There are 8 national wildlife refuges, 7 lakes, 4 bayous, 5 rivers, and 10 wildlife management areas, which provide opportunities for birdwatching within the target region. The two refuges interviewed have had visitors from all 50 states and the Black Bayou Lake Refuge has had visitors from 30 countries. The Tensas NWR has 20-30,000 visitors a year, mostly for hunting; the citizens of Louisiana, Arkansas, Mississippi and Texas are the most frequent visitors. There are also two public hunting lodges (Giles Island and Honey Brake) that offer birdwatching opportunities.

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Gaps
Gaps specific to wildlife watching include a lack of bird watching guides or guided trips, bird maps, and broadband (internet and cell phone reception). The same gaps that apply to other forms of tourism, such as a lack of dining and lodging options, also apply to birding.

Models and Resources

**Alabama Coastal Birding Trail**
One great model for a regional birding trail is the **Alabama Coastal Birding Trail**, which is a 300-mile birding trail with 50 sites and six loops in Alabama’s Gulf Coast region. The Alabama Coastal Birding Trail (ACBT) was opened in 2002 through a U.S. Fish and Wildlife Service grant to the Alabama Gulf Coast Convention and Visitor Bureau (CVB). The CVB, under the direction of Director Herb Malone, has focused on promoting eco-tourism initiatives in the region. Malone was reviewing data on the regional and national economic impact of birders on a community and thought a birding trail would be a way to overlay eco-tourism on the existing diverse bird population in the Gulf Coast. Hank Burch, manager of 5 Rivers, Alabama’s Delta Resource Center, is now the current manager of the trail. Since taking over the trail maintenance in late 2011, Burch has worked to replace many of the private sites with sites that have better amenities for visitors. All sites have easily identifiable signs with an 800 number that visitors can call for more information. Burch is focusing on making sure each site is easily accessible to the public. Once the trail is updated, Burch plans to focus on promoting the trail through social media and events associated with the trail. One existing event is the Alabama Coastal Birdfest, which is an annual four-day fall event that draws 300 to 350 birders from 25-30 states. Burch thinks a similar event in the spring, to catch the northern bird migration, could be successful.

**Strawberry Plains Audubon Center**
**Strawberry Plains Audubon Center** in Holly Springs, Mississippi, hosts a successful annual Hummingbird Migration Celebration and Nature Festival each September. This award winning festival treats thousands of guests to renowned speakers on various nature topics, live animal shows, guided walks/wagon rides and a close-up look at the Ruby-throated Hummingbird, one of nature’s most fascinating creatures. Strawberry Plains is the perfect site for these hummingbirds to stop and refuel before the grueling non-stop flight across the Gulf of Mexico. Feeders and an abundance of native plants that provide nectar and insects help the hummingbirds pack on the required weight for the 22-hour Gulf crossing. The setting around the historic Davis House plantation and gardens make this nature celebration an experience.

**Tennessee Wildlife Resources Agency**
The State of Tennessee and specifically the Tennessee Wildlife Resources Agency does a good job of showing watchable wildlife opportunities around the state ([http://www.tnwatchablewildlife.org/wheretowatch.cfm](http://www.tnwatchablewildlife.org/wheretowatch.cfm)). This may be a great model to build on in the entire region.

**Audubon Society**
There may be potential for a group like Audubon to help the four states develop consistent bird watching guides or guided trips, maps and online resources.

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75 Personal communication. Hank Burch. Alabama Coastal Birding Trail. 251-625-0814.
Stork and Cork Birding Festival

The Stork and Cork Birding Festival is an annual summer event at Tara Wildlife in Mississippi.

Aggregators

Aggregators are groups that bring birders together into organized activities. Potential aggregators for birders include birding clubs, couples groups, bus tour operators, garden clubs, paddling clubs, boy scouts, nature clubs, school groups, local organizations, churches, home school groups, fishermen and photographers. Next steps might include making aggregators more aware of the birding assets in the target region.

The Potential

Considering that the average wildlife watcher, factoring in non-residents and residents, spends $766 each year, there is significant potential to increase spending in the Lower Mississippi River region. If the region attracted 1,000 more wildlife watchers, this would account for an additional $766,000 in direct spending to the region on an annual basis.

Hunting and Fishing
Based on interest by two of the pilots, this report also includes some information about the consumptive wildlife activities of hunting and fishing.

National Trends

Hunting
In 2011 13.7 million people, 6% of the U.S. population 16 years old and older, went hunting. Hunters in the U.S. spent an average of 21 days pursuing wild game. Big game like elk, deer and wild turkey attracted 11.6 million hunters (85%) who spent 212 million days afield. Over 4.5 million (33%) pursued small game including squirrels, rabbits, quails, and pheasants on 51 million days. Migratory birds, such as geese, ducks and doves, attracted 2.6 million hunters (19%) who spent 23 million days hunting. Hunting for other animals such as coyotes, groundhogs and raccoons attracted 2.2 million hunters (16%) who spent 34 million days afield.

Overall hunting participation increased 9% from 2006 to 2011. The numbers of big game hunters rose 8%, migratory bird hunters increased 13%, and hunters seeking other animals increased by 92%. The number of small game hunters declined 6%.

The 10-year comparison between the 2001 and 2011 surveys shows an increase in both the number of hunters and their expenditures. Overall participation was up 5% over the time period. Big game hunting increased 6%. Small game and migratory bird hunting had declines of 17% and 13%, respectively. Other animal hunting increased 107%. Total hunting expenditures increased 27%. Expenditures for hunting equipment, such as firearms, ammunition, and archery equipment, increased 33%.78

Fishing
As one of the most popular outdoor recreational activities in the United States, fishing attracted 33.1 million individuals 16 years old and older in 2011. These anglers spent an average of 17 days fishing. Freshwater fishing (excluding Great Lakes) was the most popular type of fishing with 27.1 million anglers devoting 443 million days to the sport. Great Lakes and saltwater fishing were also popular with 1.7 million and 8.9 million anglers, respectively.79

Comparing results from the 2011 Fishing, Hunting, and Wildlife-Associated Recreation Survey with those of the 2006 Survey reveals the number of anglers increased 11%. The biggest increase was by Great Lakes anglers, a 17% increase in participation. The increases for saltwater and non-Great Lakes freshwater angling participation were 15% and 8%, respectively. While participation in fishing increased from 2006 to 2011, total fishing-related expenditures declined 11%. Expenditures for fishing equipment such as rods, reels, poles, and tackle did not decline, however.

Economics
Expenditures by hunters, anglers and wildlife-recreationists were $145.0 billion. This equates to 1% of gross domestic product; meaning one out of every one hundred dollars of all goods and services produced in the U.S. was due to wildlife-related recreation.80

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79 Ibid.
Hunters spent $34.0 billion on trips, equipment, licenses, and other items to support their hunting activities in 2011. The average expenditure per hunter was $2,484. Total trip-related expenditures comprised 31% of all spending at $10.4 billion. Other expenditures, such as licenses, stamps, land leasing and ownership, and plantings totaled $9.6 billion, 28% of all spending. Spending on equipment such as guns, camping equipment, and 4-wheel drives comprised 41% of spending with $14.0 billion.

Total hunting-related spending increased between 2006 and 2011. There was a 30% increase over the five-year period. Purchases of hunting equipment such as guns, decoys, and ammunition increased 29%. The category with the biggest increase was land leasing and ownership with 50%. Trip-related spending was up 39%.

Anglers spent $41.8 billion on trips, equipment, licenses, and other items to support their fishing activities in 2011. The average expenditure per angler was $1,261. Trip-related spending on food, lodging, transportation and other trip costs totaled $21.8 billion, which is 52% of all angler spending. Spending on equipment was $15.5 billion and comprised 37% of spending. Magazines, membership dues and contributions, licenses, and other fishing expenditures accounted for 11% at $4.5 billion.81

Regional Trends
State data from the 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation is unavailable at this time.

Based on 2006 data, in Mississippi, there were 546,000 resident and non-resident anglers (80,000 were non-residents), and 304,000 resident and non-resident hunters (66,000 were non-residents). This data broke out spending by non-residents in each category, but provided information on resident spending only in combination with non-resident spending. Non-resident anglers were spending $288 per trip and $38 per day, while residents and non-residents combined were averaging $434 per trip and $14 per day. Non-resident hunters were spending $1328 per trip and $79 per day, while residents and non-residents combined were averaging $1694 per trip and $22 per day. In 2006, 656 thousand state resident and nonresident sportspersons 16 years old and older fished or hunted in Mississippi. This group comprised 546 thousand anglers (83 percent of all sportspersons) and 304 thousand hunters (46 percent of all sportspersons).82

In Louisiana, there were 702,000 residents and non-resident anglers (112,000 were non-residents), and 270,000 resident and non-resident hunters. Non-resident anglers spent $2,223 per trip and $123 per day, while resident and non-resident anglers combined spent $1,416 per trip and $30 per day. Resident and non-resident hunters combined spent $1,904 per trip and $34 per day.83

Mississippi
The Lower Delta Partnership is interested in hunting and fishing, as many hunters and anglers come to the South Delta annually to hunt and fish. The hunting demographic has been getting older, but there is a new push to get youth involved in the outdoors. As a result, more youth are getting involved. Most hunters and anglers that come to this area either hunt on private land and belong to a private club or have been hunting the public lands for years. Newer hunters tend to belong to clubs. Alligator and hog hunting are increasingly popular as well as the standard deer and duck hunting. Target/clay shooting, which is offered by Tara Wildlife, but no place else, is another popular trend. Target/clay shooting appeals to people with camps and those on paid hunts during down time. Assets to support hunting and fishing include many public lands (like Delta National Forest), oxbow lakes, some outfitters, Tara Wildlife, Eagle Lake, Lake Washington, grocery stores and limited restaurants. Hunters and anglers are mostly male and at a variety of economic levels.

Louisiana
According to recreational license information from 2004-2012 (available at http://www.wlf.louisiana.gov/licenses/statistics), recreational licenses have increased in the area from 2004 to 2012; this area pulls hunters and fishermen from across the state that may have purchased their license from outside the region. There are many assets in terms of hunting and fishing, including 8 wildlife refuges, 7 lakes, 4 bayous, 5 rivers, and 10 wildlife management areas. There are two public hunting lodges (Giles Island and Honey Brake). People from all over the US travel to northeastern Louisiana to hunt; however, most of the hunters come from southeastern areas, from Texas to North Carolina down to Florida. These hunters lodge in some of the privately owned lodges, camps or recreational vehicle parks. Those who pay for lodging and a guide typically spend $1,900 for a three-day hunt. A less costly experience can be had by leasing property and hunting or hunting on the wildlife refuges in the area. Many people belong to hunting clubs which provide the amenities as part of the price to join. Aggregators include corporations who offer retreats to employees, weddings, ecotourism groups, hunting clubs, men’s groups, etc.

Consumptive Tourism Gaps
The gaps in this region related to hunting and fishing are not a lack of services for hunters and anglers; rather they are the lack of well-organized and publicized activities for guests who come to accompany hunters and anglers but do not fish or hunt themselves. The main message is that not everyone in a family hunts; activities and tourism opportunities need to cater to all members of a family. These people are looking for non-consumptive activities that might require increased staffing of hunting lodges and might include a camp for youth, equestrian trails, cultural and heritage activities, paddling, and other options.

Filling gaps in the other tourism areas will work toward filling this gap as well. Walton nature-based tourism grantees along the Lower Mississippi River may want to collaborate with hunting and fishing lodges to provide the non-consumptive activities they are seeking for families of hunters and anglers. With the assistance of an organization like the Audubon Society, it may be possible for the region to collaborate to create guides or guided trips, maps and itineraries.

Hunters and anglers could also benefit from improved lodging, including RV sites, dining options, accessible supplies, and guides.

Recommendations and Resources
The established hunting and fishing culture and infrastructure may provide a base on which to build in expanding access to and engagement in a wider variety of tourism activities, particularly for the families of hunters and anglers. Hunting lodges may provide part of the answer to lodging shortages off season.

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Tara Wildlife
One hunting resource in Mississippi is Tara Wildlife, which offers hunting trips, corporate retreats, and summer camps. Their archery hunts bring 25-30 hunters every 3 days; their rate of repeat business is 80%. Their surveys have said that hunting deer was not the top reason people came to Tara; the top reason was being with nature and seeing wildlife, getting away and seeing friends. According to Manager Mark Bowen, hunters come to Tara from up and down the East Coast. Tara also attracts companies wanting to hold business meetings and retreats; the average size is 20-40 people. Tara offers nature weekends twice a year. The last week of August, their nature weekend attracts 140-160 people and offers paddling, wildlife watching, and more. Their Stork and Cork Birding Festival is another draw. Tara also offers fishing memberships as they have 8 miles of river frontage.

The Potential
Based on the fact that the average annual hunter expenditure was $2,48485, if this region were to attract 1,000 hunters, that would account for almost $2.5 million in direct spending a year. Based on the fact that the average annual angler expenditure was $1,26186, the addition of 1,000 anglers would lead to over $1.2 million in direct spending a year.

Recommendations for Strengthening Tourism related to Paddling, Culture and Heritage, Non-consumptive and Consumptive Wildlife Activities in the Lower Mississippi River Region

Based on the work done so far, it is clear that, while there is real potential to increase tourism related to Paddling, Culture and Heritage, Non-consumptive and Consumptive Wildlife Activities in the Lower Mississippi River region, it will take increased collaboration to realize it. There have been some successful examples of regional collaboration already, and there is clearly room for more. If the goal is to increase nature-based tourism in the Lower Mississippi River region in an effort to increase the amount of conservation and preservation happening in the region, collaboration is necessary. This may take the form of a wealth creation value chain or a network.

Wealth creation value chains are strategic alliances of partners who work together to provide specific products, services and values to meet market demand. A value chain is a set of processes, trading partner relationships, and transactions that delivers a product or service from the producer(s) to the consumer(s). There is a supply chain associated with every product or service we use. For example, members of a regional tourism value chain might include landowners, small businesses, lodging, dining, transportation, inbound tour operators, out of area tour companies and other aggregators, attractions, artisans and others.

In any value chain, there is a role for aggregators. For example, rather than marketing a region to individual tourists, it makes much more sense to engage aggregators (such as tour operators, bus companies, seniors groups, church groups, and colleges/universities) that can bring many more people to a region and organize these trips throughout the year.

Potential Aggregators

One bus company we spoke with, Cline Bus Tours, operates 100 buses in 4 locations. Most buses can carry 56 passengers, but some range from 20-40. Cline is equipped to provide transportation for 30 tours a day. Much of their work is around school field trips, but they also serve seniors, church groups and international visitors. Cline generally does not package tours, but rather provides transportation for those companies that are packaging tours. As for advertising, Cline finds that their sponsorship of Helena, Arkansas radio station KFFA helps them attract an international audience.

Another tour company, Sweet Magnolia Tours, has a large international presence; they cater to Europeans who want to listen to music in the Delta. They are another potential value chain partner. Sweet Magnolia has stated that there are not enough amenities in the region available for their customers. Sweet Magnolia offers fly/drive multi-city packages (including All-Arkansas, All-Mississippi, All-Tennessee, Nuttin’ But Blues, Land of the Kings, Roots of Rock n Blues, Rhythms of the South, Romance of the Deep South, Southern Soul Experience, and Ultimate Music and Heritage Deep South Tour).

Jay Wood at Mississippi Audubon conducted research on tour operators in the region in 2012, which resulted in a resource list. Next steps for Jay and the Walton grantees over the next year are to determine the criteria by which they select destinations for their customers, and any unmet customer desires. Jay’s research clearly suggests that connecting with the convention and visitors bureaus (CVBs) in the region is another possible strategy; CVBs are aware of groups seeking tours in the region.
There are two additional coalitions with which a regional initiative should connect to identify potential value chain partners. Travel South USA[^87] is a coalition of southern state tourism directors who attend conferences, trade shows, etc. Escape to the Southeast[^88] is a coalition of tourism industry companies and professionals, basically a professional trade association.

**Potential Learning Journeys**

In addition to identifying models for regional tourism development by activity, another goal for this study was to suggest potential learning journeys for the Lower Mississippi River grantees. A learning journey is a key tool to foster understanding and application of the wealth creation approach, as well as an excellent approach to foster learning and collaboration. It is a visit to a site where a value chain similar to the one you are trying to create has been created and maintained over time and successfully produces multiple forms of wealth. Learning journey participants learn why members of the value chain became engaged and how they have benefited, as well as what mistakes were made and lessons learned. To maximize learning and application of the learning journey back at home, it is important that the journey be intentionally structured around the fundamental challenges and opportunities facing the visiting group. Learning journeys make the most impact when visitors are able to meet and learn directly from colleagues who play roles in the value chain similar to the roles they envision for themselves. It is also important that group members be intentional in the questions they pose.

There are a variety of potential learning journeys relevant to developing regional tourism in the Lower Mississippi River region. The selection of a learning journey will depend on what the group wants to learn. For example, if the group is interested in learning about how tourism/recreation groups in different states collaborate to create something broader, the Northern Forest Canoe Trail might be an interesting journey. This trail ties together four states and Canada to provide a 740 mile long paddling opportunity. This learning journey would also offer an opportunity to learn more about how to develop paddling tourism. See more information in Appendix D.

If historical/cultural tourism is of interest, there are several potential learning journeys. Birmingham, Alabama is an excellent example of a city using the civil rights movement to attract tourists interested in history. See more information in Appendix D.

If wildlife watching is of interest, Texas or Alabama offer well-used and well-regarded birding trails. The Alabama Coastal Birding Trail is a great example of something relatively close. See more information in Appendix D.

**Filling Common Gaps**

In researching regional demand for nature based tourism as well as individual pilot demand, it became clear that there are common gaps to attracting tourists and aggregators to this region, which include hard infrastructure such as lodging and dining, as well as soft infrastructure such as outfitters, public education and

[^87]: 3400 Peachtree Road NE, Suite 939, Atlanta, GA 30326, Tel: 404.231.1790 Fax: 404.231.2364, info@travelsouthusa.com, http://www.travelsouthusa.org/

[^88]: 3400 Peachtree Road, NE, Suite 725, Atlanta, GA 30326-1170, Phone: (404) 364.9847, Fax: (404) 262.9518, STS@southeasttourism.org, http://www.escapetothesoutheast.com/index.cfm
training for people who come into contact with tourists, and an online presence with regard to marketing. Gaps and resources that are specific to different types of tourism opportunities have been identified above.

**Hard Infrastructure**

**Lodging**

The target region as a whole suffers from limited lodging opportunities for tourists. The range of desired lodging options mentioned by respondents includes more camping, RV options, dorm-style accommodations for John Ruskey’s paddling trips, more bed and breakfasts and more high-end lodging. Large hotel chains are unlikely to build new hotels in the small towns around this region. Conversations with Jonathan Crisp of the American Ecotourism Society lead us to believe that he may be a good partner in developing lodging appropriate to the region. Jonathan is interested in the possibility of building large cabins around this area that would eventually be owned, managed and controlled by local communities. One gap noted by LSU AgCenter specific to eastern Louisiana is the lack of a large conference hotel to attract large conventions. While this area has diverse lodging options, these hotels are typically busy during the week (when conferences need lodging) and empty on the weekends.

**Dining**

Tourists today are challenged to finding adequate dining options in this region. Local food and restaurants are needed; there is value in encouraging more local cuisine as an opportunity to further promote cultural and heritage tourism, potentially through a culinary trail, such as the successful Southern Foodways Trail. To encourage entrepreneurs to develop such businesses, technical assistance, community financing, and small business assistance are needed.

**Soft Infrastructure**

**Outfitters and Guides.**

Increasing demand in the paddling, historical/cultural and non-consumptive wildlife watching subsectors suggests a need for more outfitters and guides. This implies a need for technical assistance and support for outfitters and guides, such as education, training and insurance. John Ruskey is training new outfitters and may be a good partner in developing this capacity in the region. The American Canoe Association may be a good ally in terms of providing technical assistance and support for outfitters, including education, training and insurance. With regard to wildlife watching, Audubon may be a good partner in training guides knowledgeable in watchable wildlife. As for historical/cultural guides, there are historical preservation agencies in each state, which may be a good first connection to pursue to help in the training and development of tour guides.

**Collaborative Marketing and Online Presence**

There is currently not enough online marketing for the region and what does exist is very disjointed. Part of a strategy moving forward may include having a regional marketing and promotional entity or network that would manage an online presence for the region. In addition, there is a need for consistent and comparable data across the region, as well as comparable information for tourists on what’s available. This may be an area where bringing together the tourism agencies in each state may help to develop a regional solution. In addition, it may make sense to connect the tourism and recreation agencies in each state with the historical preservation agencies to develop the cross-marketing necessary to bring paddlers and recreational tourists to historical/cultural sites and vice versa.
“Destinations in which entrepreneurship in the business sector is thriving are more likely to become competitive in the active outdoor recreation travel market.” Supporting entrepreneurship in this region may be a strategy for increasing the availability of lodging, dining and guides/outfitters.

There is also a need for greater partnership to leverage funding and increase reach.

**Public Education and Hospitality Training**

Destinations can have incredible attractions, but if the hospitality and education of the residents and businesses is lacking, the destination will not be successful. This is why public education and hospitality training are so important. The Countrystyle Community Tourism Network (CCTN) has over the past 35 years developed positive relationships with communities all over Jamaica. In recognizing the need for communities to be properly trained, CCTN set up the Villages as Businesses program, which trains community entrepreneurs in villages to prepare them for market ready tours. Training is provided in hospitality skills, business management, product development, marketing and community governance.

Sustainable Rural Regenerative Enterprises for Families (SURREF) in the Black Belt of Alabama has taken the Jamaican model and built upon it, by also providing environmental literacy training through Roots of Success. SURREF has begun to collaborate with businesses, organizations and individuals in Black Belt communities to build capacity and quality of the local product offerings by offering training in core tourism areas of practice. This is done by preserving the unique knowledge and culture of rural communities, while focusing enterprises on conservation, cultural heritage, and agro-tourism as economic alternatives to generate synergy between the communities and these areas. Training is focused on best practices in hospitality (client arrivals/receptions, customer service, lodging services, dining services, client departure/checkout, transportation services, safety equipment and emergency planning, merchandise and souvenir sales, accounting/budgeting), and tour guiding services (interpretation and traveler engagement, cultural heritage, agro tourism, nature based tourism, species database development and publishing, activity based experiences).

The addition of the Roots of Success curriculum is meant to gain an empowering environmental literacy and job readiness curriculum that prepares youth and adults from underserved communities for opportunities in the green economy. The curriculum includes modules in fundamentals for environmental literacy; water; waste; transportation; energy; building; health, food and agriculture; community organizing and leadership; and application and practice.

> “Eco-adventure travelers, unlike mainstream package tourists, are frequently less sensitive to deficiencies in hard infrastructure, but perhaps more sensitive than other travelers when it comes to conservation and soft tourism infrastructure. While hard infrastructure may take substantial capital investment and years to develop, sometimes the soft infrastructure required by eco-adventure travelers can be developed with comparatively little capital outlay.”

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90 Countrystyle Community Tourism Network. Diana McIntyre-Pike. [ijptcaribbean@yahoo.com](mailto:ijptcaribbean@yahoo.com), [www.countrystylecommunitytourism.com](http://www.countrystylecommunitytourism.com)

91 Sustainable Rural Regenerative Enterprises for Families (SURREF). Euneika Rogers-Sipp. [e.rogsipp@gmail.com](mailto:e.rogsipp@gmail.com) 404-468-8236

92 Roots of Success. [http://rootsofsuccess.org](http://rootsofsuccess.org)

Bringing the Region Together

The Walton Family Foundation Lower Mississippi River nature-based tourism grantees have ambitious plans to further develop and promote their nature-based tourism offerings. Over the past year, these grantees have studied their value chains and potential demand for the tourism offerings they are providing. Based on conversations with the pilots as well as regional and state representatives in the areas of nature-based tourism, there seems to be a great deal of potential to develop the individual offerings of the individual pilots and connect with larger initiatives. Before developing a regional initiative, it seems prudent to allow the pilots the time and space to further develop their own value chains. Once this happens, the pilots will be better able to engage in a regional initiative.

Regarding a regional initiative, while the initial hope was for a regional value chain, it is our feeling that there may be more immediate use for a regional network that allows for networking of different place-based tourism initiatives throughout the Lower Mississippi River region and beyond. There are a number of regional initiatives with which the pilots could connect through a network, such as the Great River Road, the Mississippi River Trail, the two National Water Trails along the River, etc. A regional nature based tourism value chain is still a possibility, but a wider variety of partners will need to be engaged.

Networking Opportunities

To scale up impact in this region, it is critical to begin to connect with partners with similar interests. There are many people and organizations working on similar types of tourism and recreation opportunities, and several are willing to think about how to scale up impact regionally. All the organizations listed below have either expressed interest in a regional conversation or seem to be open to considering it.

Lower Mississippi Resource Conservation Committee
Ron Nassar, Coordinator, (601-629-6602, Ron_Nassar@fws.gov) and Angeline Rodgers, Assistant Coordinator (601-629-6621, Angeline_Rodgers@fws.gov )
http://www.lmrcc.org/

The LMRCC, based in Vicksburg, Mississippi, is a coalition of 12 state natural resource conservation and environmental quality agencies in Arkansas, Kentucky, Louisiana, Mississippi, Missouri and Tennessee. It provides the only regional forum dedicated to conserving the natural resources of the Mississippi’s floodplain and focuses on habitat restoration, long-term conservation planning and nature-based economic development. This organization works cooperatively with the Army Corps of Engineers. The LMRCC is now engaged in the Lower Mississippi Resource Assessment, which is looking at three components:

1. River engineering
2. Habitat assessment
3. Recreation needs.

One of their goals is to be of use to organizations and networks operating in this region. The LMRCC has an impressive array of GIS layers for this region and can be a resource in terms of mapping also.

Miss Lou Rural Tourism Association
Rachael Carter, 662-325-1619, carter@sig.msstate.edu
This association is interested in rural tourism in Mississippi and Louisiana, which is half of our region.

**Mississippi River Trail**  
479-236-0938  
http://www.mississippirivertrail.org/map.html

The Mississippi River Trail (MRT) is a biking trail that runs the entire length of the Mississippi River. It is the leader in connecting people and communities with the river through development and promotion of multi-use pathways and bicycle friendly roads. Its vision is to connect people with the river, communities to each other, and the river and its unique history and culture to the nation and the world. MRT’s goals include organizational development, route development, and encouraging use.

**Natural Resource Enterprises Program, Mississippi State University**  
Daryl Jones, 662-325-5769, djones@cfr.msstate.edu  
http://www.naturalresources.msstate.edu/

Daryl Jones, Program Coordinator of the Natural Resources Enterprise program at MSU, is a great ally to the work of the individual pilots and to a regional approach to nature-based tourism in the Lower Mississippi River region. The Natural Resource Enterprises (NRE) Program was established in the Department of Wildlife and Fisheries and Cooperative Extension Service at MSU to educate non-industrial private landowners in the Southeast about sustainable natural resource enterprises and compatible habitat management practices. The Natural Resource Enterprises Program is focused on effectively delivering information to landowners and community leaders that will encourage informed decision-making regarding the management of land and enterprises.

**Mississippi River Institute**  
Larry Jarrett, Director, DeSoto County Greenways and Parks, 662-489-9708, desotogreenways@gmail.com

In conversations with Larry Jarrett of the Mississippi River Institute, it’s clear that this group can be a great regional partner as well. Natural Resources Initiative of North Mississippi (NRI) brings together federal, state and local representatives from the natural resources and economic development sectors to protect and sustain natural resources while promoting business development opportunities. NRI began in November 2001 with a series of meetings and planning sessions. NRI incorporates the goals and objectives of its network organizations by promoting partnerships and leveraging of resources. Their mission is to facilitate achievement of an environmentally sustainable, healthy and dynamic economy through creative leadership and proactive partnerships that value the use and protection of natural resources and human capabilities for the benefit of present and future generations.

Some accomplishments that relate to a Lower Mississippi River regional tourism approach:

- Selected as one of nine organizations and communities from across the southeast to receive planning and technical assistance from the National Park Service’s Rivers, Trails and Conservation Assistance Program.
- Sponsor of the Mississippi Naturalist Program and Teacher Environmental Education Workshops in North MS.
• Set up a Land Trust (North MS Land Trust) to serve North MS.
• Initiated a State-wide Nature Based Tourism Task Force in 2005.
• Helped Start a County Greenways and Parks Program in DeSoto County, MS.
• Conducted the 2009 and 2010 Mississippi Green Infrastructure Training conference. Developed Green Infrastructure education and outreach materials for Mississippi that were distributed to the US Environmental Protection Agency and the Mississippi Department of Environmental Quality to promote awareness of and lead to the incorporation of Green Infrastructure principles in future projects.

National Trust for Historic Preservation
Beth Wiedower, National Trust for Historic Preservation, 870.816.0774, bwiedower@savingplaces.org www.arkansasdelta.org

Beth Wiedower was a preservationist with experience in the fields of community revitalization and cultural heritage development. She was the Arkansas Delta Field Director for the National Trust for Historic Preservation’s Rural Heritage Development Initiative in Arkansas – a multi-year pilot program focusing on heritage based economic development in the 15 county Arkansas Delta. As part of her work, she was incubating and initiating projects, and looking at cutting edge innovation in the field of preservation and community revitalization. The Main Street model has been broadened to work better for rural and regional areas to look at building stock, entrepreneurs, economic development, marketing and design. Her approach in her region was an asset based economic development approach to build on existing assets to create unique places in the region. She was also a part of a project with Audubon called Birding the Byways, working in 15 counties from the Missouri Line to the Louisiana border, developing birding experiences along the scenic byways. Part of this work with Audubon involved creating a curriculum for hunting lodges, hoteliers, B&Bs to help them to gain off-season value added business and to educate them that birding is a major industry around the country and the world. Beth worked with Phillips Community College in Arkansas County to develop that curriculum. Beth has also worked with Arkansas Delta Made, which supports 70 entrepreneurs and small businesses throughout the Delta, modeled on Handmade in America. Beth thinks there may be a way to connect with the Brand USA tourism initiative, which is meant to market and rebrand the US to international travelers.

Beth has great insights into how to build up entrepreneurs in this region to serve the tourism industry. She is interested in regional thinking across state lines. She was part of the MidSouth Regional Greenprint Steering Committee, which is another model of collaboration. This steering committee is exciting because it is on a large enough scale and representations have come together across state lines and collaboratively applied for and received federal money for implementation. Beth believes that the region needs to work toward some organization or board or advisory committee with political will to work together across states to implement great ideas around tourism. However, there is a need for political will which can, in turn, attract funding.

NOTE: Since we last spoke with Beth, she has changed jobs and is now the Senior Field Officer at the new Houston Field Office for the National Trust for Historic Preservation.
American Society of Ecotourism
Jonathan Crisp, President, The American Society of Ecotourism (ASET), 901-833-7570, jzcrisp@gmail.com
http://www.etourism-usa.com/

One opportunity to consider is a continuing conversation with Jonathan Crisp, President of the American Society of Ecotourism in Cordova, Tennessee. Jonathan grew up along the Mississippi River in Lauderdale County, between Shelby Forest and Tipton County. He feels that this region is one of the best kept secrets, being along the flyway from Canada to Mexico. Jonathan works for Kimmons Wilson, a hotel operator that operates Holiday Inns, Embassy Suites and Hampton Inns and brings in $800 million in revenues. He is also an adjunct professor at the University of Memphis, training hotel managers through his hospitality program. Jonathan is very interested in a triple bottom line approach to tourism as well as attempts to change human behavior. He feels that ecotourism is a balance between people, profit and planet. The American Society of Ecotourism will have its own website soon; www.etourism-usa.com. Jonathan is interested in enrolling students in the hospitality school in order to change the thinking about ecotourism.

Jonathan’s newest endeavor is to use structural insulated panel technology or SIPS to develop lodging in this area of the Mississippi River. He’s built 25 hotels and realizes that big hotels are not going to locate in the region of the Lower Mississippi River. He’s considering the bottoms between Lauderdale County and Reelfoot Lake for a test. Jonathan wants to use SIPS to panelize LEED certified cabins that would hold 18 campers with men’s and women’s bathrooms, as well as meeting space, pantry, and heating and cooling. The sides of the buildings are designed with garage doors so that the building can turn into a pavilion. Jonathan hopes to get corporations to adopt cabins, which could be built by a community barn raising. Kids could get hands-on experience and grist for their resumes. Without debt, the cabins can then be turned over to a community organization for maintenance and management. There must be a guarantee that 20% of the revenues that come out of the cabins would go back to the nearest Wildlife Refuge. Jonathan’s focus would be 40-60 miles outside of Memphis to start, to service those people looking for stay-cations. Cabins could be rented for $100 or more a day. He wants to build these cabins and make them attractive enough to bring mass tourists to the area, supporting nature, and creating minimal impacts, learning about the environment and being friendlier to local habitats. Jonathan has an architectural firm, A2H in Memphis, that volunteered to do the architectural pieces.

Jonathan feels that the largest demand for this type of lodging right now would be Reelfoot Lake, where there are bald eagle tours now. However, he believes that these cabins could be built anywhere in the US where there is a demand generator. He wants people and/or communities to adopt buildings and build them like Habitat for Humanity. A national nonprofit support team could manage the big picture, and turn over the cabins to a nonprofit in each community. It could become part of a neighborhood association. However, he wants there to be inspections to make sure there is no abuse of the system. This would create a local supply or value chain, so that local people are supplying consumables, cleaning and maintenance. This would require training locally.

The main objective is to build these and keep the cost as low as possible in order to support the community and habitat. “You can’t build a big hotel in these areas... it would have a high impact on the area.”

Next steps for Jonathan are to talk to large hotel chains and foundations, like the Wilson Family Foundation, about grants to get this started, and to find a place to build the first one. “I think I can use this system to protect what needs to be protected in nature... and make a sustainable profit without allowing capitalism to rape and pillage. And create poverty alleviation.”
Mississippi River Water Trail
Jon D. Summers, Rivers Project Office, Mississippi River Water Trail, 636-899-0094, Jon.D.Summers@usace.army.mil
http://www.greatriverwatertrail.org/

Jon Summers is a Natural Resource Specialist with the U.S. Army Corps of Engineers in the St. Louis District. Jon is developing a blueway on the Mississippi River in this district. The blueway is 120 river miles within the controlled sections of the River. His plans include taking it down to Cairo in the open section of the River, which is similar to what is faced in the Lower Mississippi. Eventually the water trail will run 300 river miles from Saverton, Missouri to Cairo, Illinois. A Mississippi River Water Trails Association has also been started along the trail.

This blueway is a collaboration between the Corps, St. Louis Canoe and Kayak Club, Mississippi River Water Trail Association, state agencies, U.S. Fish and Wildlife Service, National Park Service. The trail also collaborates with Convention and Visitors Bureaus and the Sierra Club. The Water Trail Association meets once a month; all the groups mentioned would be a part of that association. The ultimate goal is to make one trail for the entire 2,400 miles of the River with consistency.
Next Steps

There are a variety of next steps that could be taken to move this regional nature-based tourism endeavor forward. While the pilots on the ground are doing great work, a regional initiative requires more partners with shared goals and an interest in taking this work to scale. As possible next steps, we suggest convening people from the four-state region who have an interest in working at a regional scale in an effort to articulate shared goals. This could include developing a strategy to measure progress. Additional possible next steps include:

1. Enlist the assistance of a tourism development consultant. Yellow Wood has had experience with Solimar International94 which has specific expertise in community-based tourism; David Brown is working with a community-based tourism initiative in Alabama, SURREF. There are undoubtedly other tourism development consultants.

2. Conduct a more detailed investigation into consumer tourism demand to provide information needed to determine priorities with respect to lodging, dining and other services and amenities. SURREF has worked with the Marketing Workshop95 to conduct a study of consumer tourism demand in Alabama.

3. Plan one or more learning journeys. Walton Foundation staff, grantees in the four states, and those regional partners that are engaged need to think about what the focus of a learning journey would be, whether to learn more about a particular form of tourism (like paddling) or ways that regions have collaboratively promoted themselves.

4. Research best practices in addressing specific gaps such as public education, hospitality training or local dining options. There may also be value in researching best practices around educating community residents about the value of their hometowns and regions so that they are better able to promote what is interesting and fun about where they live.

5. Develop and test market sample potential tourism itineraries. This was discussed at the October meeting of Walton nature-based tourism grantees held in Louisiana. This still seems to make sense as a strategy for engaging state tourism directors and other tourism professionals in the offerings of the Lower Mississippi River region. The two we have discussed so far include one focused on John Jay Audubon’s travels through the Lower Mississippi River region. The other we discussed was focused on blues or music in general along this corridor.

6. Bring together state tourism directors to explore the potential for these four states (Arkansas, Louisiana, Mississippi, and Tennessee) to work together to support the potential tourism offerings of a larger Lower Mississippi River region nature-based tourism group. There may be a discussion about cross-marketing between states, recognizing that the majority of tourists to this region are coming from within the region.

7. Consider the creation of a potential regional value chain or a regional network for nature-based tourism along the Lower Mississippi River. There are many networks already operating in this area, but none that are specifically focused on nature-based tourism. This would allow Walton and its grantees to begin to collaborate with others who have similar interests and goals.

Appendices
Appendix A: Lower Mississippi River Resource Assessment Area

Counties & Parishes in the Lower Mississippi River Resource Assessment Area (As defined by the Army Corps of Engineers)
Counties in **bold** are those targeted by Walton grantees. Counties in **bold** and parentheses ( ) are targeted by Walton grantees but not a part of the Lower Mississippi River Resource Assessment Area.

**Illinois**
- Alexander
  - Tipton
  - Shelby
  - (Obion)

**Kentucky**
- Ballard
- Carlisle
- Hickman
- Fulton
- Ballad
- Carlisle
- Hickman
- (Obion)

**Arkansas**
- Mississippi
- Crittenden
- Lee
- Monroe
- Phillips
- Arkansas
- Desha
- Chicot
  - (Jefferson)
  - (Lawrence)
  - (Lincoln)
  - (Lonoke)
  - (Poinsett)
  - (Prairie)
  - (Pulaski)
  - (Randolph)
  - (St. Francis)
  - (White)
  - (Woodruff)

**Missouri**
- Scott
- Mississippi
- New Madrid
- Pemiscot
- Tipton
- Shelby
- (Obion)

**Tennessee**
- Lake
- Dyer
- Lauderdale
- (Jefferson)
- (Lawrence)
- (Lincoln)
- (Lonoke)
- (Poinsett)
- (Prairie)
- (Pulaski)
- (Randolph)
- (St. Francis)
- (White)
- (Woodruff)
- Yazoo
- Issaquena
- Warren
- Claiborne
- Jefferson
- Adams
- Wilkinson
- East Baton Rouge
- West Baton Rouge
- St. Martin
- Iberville
- Ascension
- Iberia
- Assumption
- St. James
- St. John the Baptist
- St. Charles
- Jefferson
- Orleans
- Terrebonne
- Lafourche
- St. Bernard
- (Ouachita)
- (Morehouse)
- (West Carroll)
- (Richland)
Appendix B: State Specific Tourism Data

Table 6: Economic Impact of Tourism in the Selected Counties of Grantees in this Region (see list in Appendix A)

<table>
<thead>
<tr>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment (Thousands)</th>
<th>State Tax Receipts ($ Millions)</th>
<th>Local Tax Receipts ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louisiana - Selected County Total</td>
<td>340.06</td>
<td>56.07</td>
<td>2.74</td>
<td>15.67</td>
</tr>
<tr>
<td>Mississippi - Selected County Total</td>
<td>1.44</td>
<td>19</td>
<td>2.2</td>
<td>.12</td>
</tr>
<tr>
<td>Tennessee - Selected County Total</td>
<td>3,039.92</td>
<td>1882.21</td>
<td>48.53</td>
<td>133.84</td>
</tr>
<tr>
<td>Arkansas – Selected County Total</td>
<td>545.35</td>
<td>100.71</td>
<td>6.5</td>
<td>33.6</td>
</tr>
<tr>
<td>Total – Regional Counties</td>
<td>$3,926.77</td>
<td>$2057.99</td>
<td>59.97</td>
<td>$183.23</td>
</tr>
</tbody>
</table>

Tourists to this region like to shop, dine, sightsee, visit museums, national and state parks, historic sites, nature and ecotravel. Many visitors to these states are visiting family and friends, which provides an opportunity to engage them in seeing the sights.

In general, tourists to the states of the Lower Mississippi River region are coming from within the region. Visitors to each of the Lower Mississippi River states come from their own states and surrounding states, including Texas, Missouri, Oklahoma, Florida, Alabama, Georgia, Illinois, Ohio and Kentucky. Tourists visiting this region are generally visiting for 2-3 nights. The average age of tourists ranges from the high 40s to low 50s.


Arkansas
Arkansas is known as the Natural State due to the abundance of opportunities for outdoor recreation. There are 52 state parks, seven National Park System sites, and three national forests. Arkansas was also the site of more than 770 military actions during the Civil War. Many of these sites are open to visitors as parks or museums.

The top visitor origin states, accounting for 53% of total visitors, were Texas, Missouri, Arkansas, Oklahoma and Louisiana. The top five Arkansas counties listed as a final destination are Garland, Pulaski, Carroll, Benton and Fulton; none are in the Lower Mississippi River region. The Arkansas Delta Byways region of the state, which is part of the Lower Mississippi River region, brings in over $545 million in tourism expenditures.

Figure 8: Arkansas - Total Travel Expenditures by Tourism Region, 2010

---


Figure 4 is also drawn from this report.
Table 7: Impact of Travel on Arkansas Tourism Regions, 2010\textsuperscript{101}

The average visitor to Arkansas in 2010 traveled in a party of 2.2 people, stayed for 3 nights, had an income of $60,563, spent 5.4 weeks trip planning, and was of an average age of 53.1. About 75% of visitors came with their family and 24% came as individuals.\textsuperscript{102}

\begin{table}[h]
\centering
\begin{tabular}{|c|c|c|c|c|c|c|}
\hline
\textbf{County} & \textbf{Total Travel Expenditures (Dollars)} & \textbf{Travel-Generated Payroll (Dollars)} & \textbf{Travel-Generated Employment (Jobs)} & \textbf{Travel-Generated State Tax (Dollars)} & \textbf{Travel-Generated Local Tax (Dollars)} & \textbf{Visitors (Person Trips)} \\
\hline
Arkansas Delta Byways & & & & & & \\
Arkansas & 29,932,552 & 4,825,805 & 305 & 1,819,925 & 653,091 & 135,087 \\
Chicot & 10,992,380 & 2,234,062 & 133 & 669,170 & 226,386 & 48,765 \\
Clay & 12,788,842 & 1,968,453 & 120 & 775,533 & 316,881 & 55,397 \\
Craighead & 82,742,156 & 16,128,328 & 1,047 & 5,084,756 & 1,358,280 & 376,329 \\
Crittenden & 138,904,770 & 25,235,348 & 1,705 & 8,678,741 & 2,530,393 & 632,193 \\
Cross & 12,668,520 & 2,270,559 & 143 & 774,138 & 240,734 & 58,340 \\
Desho & 20,272,510 & 3,688,308 & 251 & 1,238,032 & 378,573 & 95,020 \\
Drew & 21,045,018 & 4,018,900 & 281 & 1,289,998 & 380,467 & 94,884 \\
Greene & 20,406,674 & 3,766,813 & 252 & 1,238,505 & 434,842 & 94,022 \\
Lee & 3,344,741 & 480,130 & 34 & 203,043 & 93,754 & 11,312 \\
Mississippi & 88,321,843 & 18,800,565 & 1,165 & 5,413,805 & 1,762,919 & 416,478 \\
Monroe & 24,866,153 & 4,267,507 & 291 & 1,517,502 & 452,184 & 108,246 \\
Poinsett & 30,223,334 & 5,016,378 & 303 & 1,857,653 & 655,234 & 132,424 \\
St. Francis & 10,855,974 & 1,314,354 & 82 & 688,233 & 196,185 & 52,332 \\
\textbf{Totals} & 545,352,372 & 100,709,985 & 6,518 & 33,606,817 & 10,439,915 & 2,482,661 \\
\hline
\textbf{State Totals} & 5,453,192,978 & 1,029,444,562 & 58,336 & 284,743,974 & 103,553,016 & 22,770,435 \\
\hline
\end{tabular}
\caption{Impact of Travel on Arkansas Tourism Regions by County – 2010 Preliminary* (continued)}
\end{table}

* Data is preliminary and will be revised when new benchmark is received.

NOTE: Some details may not add due to rounding.

\textsuperscript{101} The Economic Impact of Travel in Arkansas. 2011. \url{http://www.arkansas.com/userfiles/apt_2011_annual_report.pdf}

\textsuperscript{102}
The top reasons tourists give for their travel to Arkansas include:  

- Visiting friends/relatives (41%)
- Sightseeing (19%)
- Entertainment (12%)
- Business (10%)
- Recreation (8%)
- Family affairs (7%)
- Other (3%)

Table 8: Activities Participated In by Arkansas Tourists, 2009 and 2010

<table>
<thead>
<tr>
<th>Activities participated in:</th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing</td>
<td>85%</td>
<td>88%</td>
</tr>
<tr>
<td>Shopping</td>
<td>51%</td>
<td>57%</td>
</tr>
<tr>
<td>Attractions</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>Historic sites</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Museums</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Live performance</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Hiking</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Camping</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Fishing/hunting</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Arts/crafts show</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Water sports</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Birdwatching</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Golf</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Antiques</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Festivals</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Sporting events</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Racing</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>19%</td>
<td>16%</td>
</tr>
</tbody>
</table>

103 Ibid.
104 Ibid.
The Arkansas Delta Byways region has a rich natural and cultural heritage, including history of early settlers and Native Americans. Today, this fertile region is known for its agriculture. Visitors will find state parks, wildlife refuges, museums and galleries, archeology sites, national heritage sites, a national forest, and recreational opportunities ranging from world-class hunting and fishing, to hiking, biking and birdwatching. Local festivals and events convey the unique flavor of the Delta, while regional museums interpret the impact of such historic events as the De Soto Expedition, the Louisiana Purchase, the Civil War, the New Madrid Earthquakes, and the Flood of 1927.

The top destinations in Arkansas\textsuperscript{105} include the Arkansas Arts Center (Little Rock), Bathhouse Row (Hot Springs), Eureka Springs Downtown Historic District, Garvan Woodland Gardens (Hot Springs), MacArthur Museum of Arkansas Military History (Little Rock), Ozark Folk Center State Park (Mountain View), Ozark Medieval Fortress (Lead Hill), Petit Jean State Park (Morrilton), Shiloh Museum of Ozark History (Springdale), and Turpentine Creek Wildlife Refuge (Eureka Springs).

\textsuperscript{105} Arkansas Department of Parks and Tourism. http://www.inarkansas.com/25319/you-voted-top-10-places-to-visit-in-arkansas
Louisiana hosts more than double the US average of African-Americans, at 16%, but the majority of visitors are Caucasian. Two-thirds of visitors originate from the West South Central census region, driven primarily by Louisiana (36%) and Texas (25%). Mississippi (6%) and Florida (4%) tie for third among Louisiana’s sources of visitors. Because many travelers arrive from nearby areas, most drive (70%).

Tourism in Louisiana, including in-state and out-of-state visitors, is reported by TNS TravelsAmerica to be rebounding after a number of weak years from the economic recession, the Gulf Oil Spill, and Hurricane Katrina. New Orleans is the top destination for out of state visitors. Alexandria, Baton Rouge, and Lafayette depend more heavily on locals for tourism (LA residents).

Lake Charles and Shreveport attract the largest share of High Business Development Index (BDI) residents, and also attracts the oldest visitors, who note greater participation in gaming.

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107 African-Americans travel less to most states. Florida and Georgia enjoy the greatest number of African-American visitors. A few states grow the number of African-American visitors in 2010 – notably North Carolina and Texas, while the numbers slip in California, Alabama, and New York. In terms of proportion of visitors, Georgia remains at the top (19%; 18% last year) while Mississippi (17%) and Louisiana (15%) continue to vie for the second spot. TNS TravelsAmerica. Calendar Year 2010 Louisiana TravelsAmerica Visitor Profile Report http://www.crt.state.la.us/tourism/research/Documents/2011-12/CY2010_TNS_Louisiana_Visitor_Profile_Report_Final.pdf

Younger visitors choose Alexandria, New Orleans, and Baton Rouge. Over 40% of visitors plan their trip within two weeks of travelling.

None of the cities mentioned above are in the counties focused on by the LSU AgCenter Walton pilot work.

Visitors stay in hotels/casinos about 50% of the time. About half (53%) pay for accommodations. The largest share of Louisiana visitors come to see friends/family and many stay with them rather than in hotels/motels/B&Bs/condos. As shown previously, Louisiana residents are least likely to take an overnight trip in Louisiana; even when they do, they spend relatively few of those nights (34%) in paid accommodations. Those traveling farthest, living outside of Louisiana and the High BDI marketing area, stay the longest (4.2 nights) and more often opt for hotels/motels.\(^\text{109}\)

<table>
<thead>
<tr>
<th>County</th>
<th>Expenditures ($ Millions)</th>
<th>Payroll ($ Millions)</th>
<th>Employment (Thousands)</th>
<th>State Tax Receipts ($ Millions)</th>
<th>Local Tax Receipts ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caldwell</td>
<td>7.12</td>
<td>0.99</td>
<td>0.05</td>
<td>0.33</td>
<td>0.47</td>
</tr>
<tr>
<td>Catahoula</td>
<td>5.45</td>
<td>0.93</td>
<td>0.06</td>
<td>0.22</td>
<td>0.35</td>
</tr>
<tr>
<td>Concordia</td>
<td>11.64</td>
<td>1.44</td>
<td>0.08</td>
<td>0.58</td>
<td>0.55</td>
</tr>
<tr>
<td>East Carroll</td>
<td>8.16</td>
<td>0.93</td>
<td>0.06</td>
<td>0.48</td>
<td>0.19</td>
</tr>
<tr>
<td>Franklin</td>
<td>7.38</td>
<td>1.14</td>
<td>0.08</td>
<td>0.29</td>
<td>0.24</td>
</tr>
<tr>
<td>Madison</td>
<td>40.6</td>
<td>3.44</td>
<td>0.16</td>
<td>2.69</td>
<td>0.62</td>
</tr>
<tr>
<td>Morehouse</td>
<td>14.45</td>
<td>2.34</td>
<td>0.13</td>
<td>0.7</td>
<td>0.39</td>
</tr>
<tr>
<td>Ouachita</td>
<td>221.42</td>
<td>41.54</td>
<td>1.92</td>
<td>9.16</td>
<td>4.26</td>
</tr>
<tr>
<td>Richland</td>
<td>16.73</td>
<td>2.02</td>
<td>0.12</td>
<td>0.94</td>
<td>0.33</td>
</tr>
<tr>
<td>Tensas</td>
<td>3.34</td>
<td>0.7</td>
<td>0.04</td>
<td>0.13</td>
<td>0.37</td>
</tr>
<tr>
<td>West Carroll</td>
<td>3.77</td>
<td>0.6</td>
<td>0.04</td>
<td>0.15</td>
<td>0.15</td>
</tr>
<tr>
<td><strong>Selected County Total</strong></td>
<td><strong>340.06</strong></td>
<td><strong>56.07</strong></td>
<td><strong>2.74</strong></td>
<td><strong>15.67</strong></td>
<td><strong>7.92</strong></td>
</tr>
</tbody>
</table>

---

The average visitor has the following characteristics: 111

- Average Age: 47
- Married: 59%
- With Kids: 32%
- Retirees: 17%
- Income: $67k
- College Grad: 45%
- Length of stay: 3 nights

Top reasons for visiting Louisiana include visiting friends or relatives, entertainment, and outdoor recreation.

Attractions in northern and eastern Louisiana include historical attractions like Poverty Point Historical State Park, the Louisiana Cotton Museum, Frogmore Plantation, Chennault Aviation and Military Museum of Louisiana, and the Biedenharn Museum and Gardens, but others include Black Bayou Lake National Wildlife Refuge, Coke Museum, Northeast Louisiana Children’s Museum, Masur Museum of Art, Landry Vineyards, University of Louisiana at Monroe Natural History Museum, Starr Homeplace, Jim Bowie Relay Station, Delta Museum, Winter Quarters Historic Site and Ike Hamilton Expo. Festivals include the Catfish Festival in Winnsboro and the Jim Bowie Festival in Vidalia. There are also many bodies of water that are perfect for paddling or other water recreation.

Mississippi
Mississippi is rich in cultural history with many Civil War battlefield sites, antebellum homes, a strong musical tradition, and the Blues Trail and Country Music Trail. Hunting, fishing and other wildlife-related activities also entice visitors to many parts of Mississippi.

The average visitor has the following characteristics: \(^{112}\)

- Average annual household income: $66,200
- Average age: 49
- Average travel party size: 2.7 persons
- Average length of stay: Mississippi residents spent 2.2 nights while non-residents spent 3.1 nights in the state.

About 46% traveled in pairs. Another 25% traveled with children. Only 5% of all visitors arrived by air. Vacation activity niche characteristics varied, with casino gamers the largest market, comprising 30%. 73% of all visitors were from out-of-state. About two-thirds of the leisure visitors overnighted. Some 78% of all FY 2011 overnight leisure visitors came from seven states—Mississippi (27%), Louisiana (11%), Alabama (10%), Texas (9%), Georgia (8%), Tennessee (7%) and Florida (6%). Reasons for visiting: 84% leisure; 7% business; and 8% personal business/other in FY 2011.

---

\(^{112}\) Fiscal Year 2011 Economic Contribution of Travel and Tourism in Mississippi. February 2012. 
Table 10: Estimated County Travel and Tourism Expenditures, Employment, Taxes, TCI, FY 2011

<table>
<thead>
<tr>
<th>County</th>
<th>Travel and Tourism Expenditures by Visitors</th>
<th>Direct Travel and Tourism Employment</th>
<th>Travel and Tourism Employment Percentage</th>
<th>State/Local Taxes/Fees Attributed to Tourism</th>
<th>Tourism Capital Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issaquena</td>
<td>$191,999</td>
<td>3</td>
<td>0.8</td>
<td>$12,208</td>
<td>0</td>
</tr>
<tr>
<td>Sharkey</td>
<td>$1,251,546</td>
<td>16</td>
<td>1.4</td>
<td>$109,241</td>
<td>$27,192</td>
</tr>
<tr>
<td>Selected County Total</td>
<td>$1,443,545</td>
<td>19</td>
<td>2.2</td>
<td>$121,449</td>
<td>$27,192</td>
</tr>
</tbody>
</table>

The top 10 states of origin, after Mississippi, were: Louisiana, Alabama, Texas, Georgia, Tennessee, Florida, Arkansas, Missouri, North Carolina, and Illinois. 71% of the 30 state-licensed casino patrons were from out-of-state, particularly from Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas.

The top attractions in Mississippi include Annual Angels on the Bluff Tour (Natchez), Museum of Natural Science (Jackson), Catfish Capitol Visitor Center (Belzoni), Sam Wilhite Transportation Museum (West Point), Movie Museums (Canton), Oldest Slave Founded Town in Mississippi (Mound Bayou), Rock ‘n Roll & Blues Heritage Museum (Clarksdale), Natchez Trace Parkway (Tupelo), and the Redding House (Biloxi).

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114 America Beautiful Network. [http://top10mississippiattractions.ianis.net/](http://top10mississippiattractions.ianis.net/)
Tennessee
Tourism is Tennessee’s second largest industry. The state is divided into three main regions:

- West Tennessee is surrounded by the Tennessee and Mississippi Rivers and features music, cultural history and natural beauty.
- Middle Tennessee is largely defined by Nashville and also features whiskey trails and is a paradise for history buffs.
- East Tennessee features the Smokey Mountains, part of the Appalachian Mountains, and is also the birthplace of NASCAR.

Fall and summer are the dominant travel seasons. Dining, shopping, entertainment, sightseeing, nature/eco-travel, national/state parks, and visiting historic sites are the most popular activities.

The average visitor to Tennessee has the following characteristics:115:

- Average Age: 45
- Average Household Income: $76,141
- Visitors stay an average of 2.2 nights.

Visitors to Tennessee are coming from the following states:

- Tennessee: 38.1%
- Georgia: 8%
- Alabama: 6.4%
- Illinois: 4.2%
- Kentucky: 4.1%
- Ohio: 4.1%

---

Based on the Mississippi River Corridor – Tennessee preliminary demand research, there are some overall tourism findings:

- $3 billion in economic impact on Memphis and Shelby County in travel expenditures
- 10 million visitors annually (daytrippers add another 4 million)
- 50,000 jobs created
- $211 million in state and local taxes.

Memphis, Tennessee is one of the larger urban areas along the Lower Mississippi River so it makes sense that tourism in Memphis would have a large economic impact. Memphis is home to most of the urban attractions along the river, outside of New Orleans.

There are three different categories of visitors to the area:

- Regional (includes daytrippers)
- National – commonly from California (3 nights average stay)
- International (3-4 nights average stay).

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116 The Economic Impact of Travel on Tennessee Counties, 2011
Attributes that tourists are seeking in the city offerings include:

- Plentiful live music venues.
- Authenticity and cultural amenities
- High quality musical history venues, educational exhibits and museums (Stax/Soulsillve, Rock and Soul Museum/Smithsonian exhibit, Graceland and Sun Studios).
- Large inventory of “stories” about the history and folklore of the region.
- Regional food – diverse offerings, high quality and unique menus.
- Memphis International Airport
- MCVB has an office in Europe and Japan for international marketing and promotions.

Attributes of rural communities include:

- Excellent small and medium sized museums for diverse educational opportunities.
- Significant Civil War sites with national trail promotions (multi-state)
- Numerous state parks for daytrippers and more cost effective vacations.
- Federal public lands for recreation: hunting/fishing, hiking, birding, camping, paddling, etc.
- Successful internet marketing efforts.
- American Steamboat Company – based in Memphis but stops in rural communities up and down the Mississippi River.
- Historic and unique downtown Court Squares for shopping and dining.
- Regional festivals (major draw in Covington in Tipton County)
- Opportunities for attract retirees.
- Experiential travel – greatest trend and opportunity. More than 4 out of 10 travelers are participating.

Gaps in this area include:

1. Lack of public access and viewing options on the Mississippi River and tributaries.
2. The need for more facilities on the Lower Mississippi River that cater to tourists (boat ramps, observation towers, unique restaurants, destination hotels/motels, camping sites).
3. More educational opportunities through academic institutions and other nonprofit organizations for programming, outings, and specific curricula to experience and learn more about bird watching, environmental education, river ecology, photography, cooking regional foods, hunting, fishing and wildlife interpretation.

4. Lack of available services for cycling.

5. Lack of marketing (internet and maps/brochures) that promote the entire MRCT and Lower MS Walton partners.

Major attractions in western Tennessee include the River, Graceland, Civil Rights Museum, Beale Street, Rock and Soul Museum, Stax Museum and Soulsville, Memphis in May and other festivals, Memphis Zoo, Children’s Museum, Pink Palace Museum, Sun Studio.
Appendix C: State Outdoor Recreation Data

Data on the active outdoor recreation economy is available for only two states in the region, Tennessee and Louisiana. Data for Arkansas and Mississippi is not available from the Outdoor Industry Foundation. The Foundation is currently updating these numbers for all 50 states and will be releasing new information in 2013.

Table 12: Tennessee Outdoor Recreation, 2006

<table>
<thead>
<tr>
<th>Activity</th>
<th># Participants</th>
<th>% of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bicycling</td>
<td>771,509</td>
<td>17%</td>
</tr>
<tr>
<td>Camping</td>
<td>945,588</td>
<td>21%</td>
</tr>
<tr>
<td>Fishing</td>
<td>685,603</td>
<td>14%</td>
</tr>
<tr>
<td>Hunting</td>
<td>283,104</td>
<td>6%</td>
</tr>
<tr>
<td>Paddling</td>
<td>362,741</td>
<td>8%</td>
</tr>
<tr>
<td>Snow Sports</td>
<td>195,498</td>
<td>4%</td>
</tr>
<tr>
<td>Trail</td>
<td>944,677</td>
<td>21%</td>
</tr>
<tr>
<td>Wildlife Viewing</td>
<td>1,701,000</td>
<td>36%</td>
</tr>
</tbody>
</table>

Table 13: Louisiana Outdoor Recreation, 2006

<table>
<thead>
<tr>
<th>Activity</th>
<th># Participants</th>
<th>% of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bicycling</td>
<td>668,978</td>
<td>20%</td>
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<tr>
<td>Wildlife Viewing</td>
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Northern Forest Canoe Trail: Case Study

A 740 mile water trail in Northern New York, Vermont, Quebec, New Hampshire, and Maine.

In the early 1990s a citizen’s group was conducting research on Native American paddling trails to secure the route information of ancient travel routes. This work became the basis of the Northern Forest Canoe Trail (NFCT). The NFCT is essentially a historical artifact, preserving ancient routes by mapping and preserving the trails, and serving to connect people to history by being on the route.

By 2000 the NFCT incorporated as a nonprofit with the mission of building a paddling trail. In 2006, the trail map was completed and the trail was officially opened. In 2010, the NFCT completed their next major milestone by publishing a guidebook. These milestones are key markers of recreational trail legitimacy.

Executive Director Kate Williams says, “We are completely dependent on partners – it’s a big part of who we are.” The NFCT works with a mix of communities, states, regional and federal agencies, as well as local guides and outfitters, chambers of commerce, and local paddlers.

The NFCT used the process of creating maps with local partners and state agencies to build a coalition. Williams says, “We use the trail to serve larger goals other than just recreation – we are committed to communities and the impacts of sustainable tourism.”

One way the NFCT has worked with communities is through a Trail Town Initiative. Williams says, “We drill down in particular communities to help community partners look at the full range of recreation opportunities, which help towns position themselves as recreation destinations.”

At first, the NFCT worried that the Trail Town Initiative was outside of their mission. In one of six community Trail Town pilots that has been meeting for six months, NFCT is already being included in the town plan. The NFCT put pieces for the trail in place at a broad level, and now they are drilling down into the community level.

“We realized our mission and our role, given that we’ve built our whole trail on this partnership model, is to provide leadership in bringing partners together,” says Williams. “We’ve found these Trail Towns are tapping into our skill at seeing the big picture and bringing partners together. We serve as a linchpin. We realized to have the impact that we intend, we need to think and act more broadly, so we are approaching our mission more broadly.”

Mission:
1) Take care of the physical trail.
2) Support local partners to ensure they benefit from paddlers and they provide services tourists need.
3) Focus on connecting people to waterways, particularly rural youth.

Membership: About 1,000 members representing almost every state.

Trail Users:
- According to member surveys - largely male, 60+, affluent
- Anecdotally – young individuals and families and college aged people who may not choose to be members.

Trips: Trend toward 3-4 day trips, with some extended week long trips.

Spending:
- About $200/person/trip.
- One through paddler - $5,000 total.

Recreation: Biking, fishing, wildlife viewing, hiking, hunting, ATV trails, historical trails, logging history.
The U.S. Army Corps of Engineers, in the St. Louis District, began to get an influx of inquiries from the public around 2003 – “Where can we paddle?” “Where can we put boats in?” “Is it safe?”

As more calls came in, the office decided to create a conceptual plan for a water trail and presented it to the St. Louis Canoe and Kayak Club, which has about 300 members. The Corps listened to the community and made sure that the water trail would be what the community wanted and needed. By 2005, the first section of the trail was completed. The Corps is working on continuing the trail in the southern stretch of the River. The greater goal is to work with partners to create a river trail from the headwaters of the Mississippi River to the Gulf. The Corps is interested in collaborating with southern partners to create a trail that is consistent for the paddling community. One question to answer is how to separate and name trail sections so that the entire river trail will be easy to navigate.

A key factor in the success of the trail is that the Corps was able to put the trail entirely on public property – city, state, or county land. This lessened liability issues and made the process easier. Easements or lease agreements were used. Going forward, the American Land Conservancy may have public land available and the Corps plans to work closely with them as the southern trail sections are developed.

The trails are maintained by the Corps with the help of volunteers and parks that share infrastructure, such as access areas.

There is no data to date on visitor use or economic impact, but the Corps has faced little opposition, mostly due to the collaborative, and community based approach that has been used.


Information provided by Jon Summers, Rivers Projects Office, 301 Riverlands Way, West Alton, MO 63386
636-899-0094 | Jon.D.Summers@usace.army.mil
Southern Foodways Alliance: Case Study

The Southern Foodways Alliance (SFA) was formally founded in 1998, under a parent organization at the University of Mississippi, The Center for Southern Culture. Their goal is to disseminate their projects for popular consumption, not just academics. The oral history subjects, which many of the trails are based on, serve as a way to teach people about the larger cultural and regional story.

The SFA’s first documentary effort began in 2002, with funding through the National Pork Board, to document BBQ signage in Memphis, Tenn. According to Oral Historian Amy Evans, the project quickly evolved into an oral history project, which culminated in what has become an annual October symposium. Ten years after the initial BBQ theme, the SFA revisited the theme for 2012.

After reflecting on ten years, Evans says the organization was surprised as how much it had accomplished and the growing interest in programs. “We want to keep a small symposium, but demand for the event has grown,” says Evans. “We are trying to deal with issues of growth, and how to have an intimate feel, but grow our message along with it. We are at a bit of a crossroads, but we are thrilled at how we have established the SFA and the area of food ways and food studies.”

“In a broader sense, our work has done a lot to validate culinary tourism as a form of economic development,” says Evans. As part of The Tamale Trail, the SFA achieved the first culinary historical marker in Mississippi, Joe’s Tamale Place in Rosedale, which is also part of the Mississippi Blues Trail.

Southern Foodways Alliance
Amy C. Evans, Oral Historian
Barnard Observatory, P.O. Box 1848, University, MS 38677
(662) 915-5993 | amy@southernfoodways.org

Mission
To celebrate the diverse foodways of the changing American South.

Trails Include
• Mississippi Delta Hot Tamale Trail, www.tamaletrail.com
• Southern BBQ Trail, www.southernbbqtrail.com
• Southern Boudin Trail, www.southernboudintrail.com
• Southern Gumbo Trail, www.southerngumbotrail.com

Most Popular Trail
The Tamale Trail, opened in 2005, was the first trail SFA created, and it continues to be the most popular. Each site has a sticker that the site chooses how to display.

Technology
The SFA has an iPhone app that lists projects and has a map that allows users to create a custom itinerary.
The Birmingham Civil Rights Trail (BCRT) will be completed in 2013. The trail begins at the Birmingham Civil Rights Institute (BCRI) and goes uptown. Each stop is designated with a metal sign.

The BCRT connects to the larger Alabama Civil Rights Trail. Visitors to Alabama are often surprised by the emphasis on Civil Rights history and the open and honest portrayal of events. Tourism officials in Alabama feel it is important to remember and to continue to serve as an inspiration for people to stand up for their rights.

The BCRT records sites with the National Historic Register, and brands the trail and sites for easy public consumption.

**Goal:**
To encourage critical thinking and create curiosity, drawing a link from cultural tourism to economic development.

**Visitors:**
In 2007 about 4.2 million people visited Birmingham. About 150,000 visit the Birmingham Civil Rights Institute annually.
The Alabama Coastal Birding Trail: Case Study

A 300 mile birding trail with 50 sites in Alabama’s Gulf Coast Region.

The Alabama Coastal Birding Trail (ACBT) was opened in 2002 through a U.S. Fish and Wildlife Service grant to the Alabama Gulf Coast Convention and Visitor Bureau (CVB). The CVB, under the direction of Director Herb Malone, has focused on promoting eco-tourism initiatives in the region. Malone was reviewing data on the regional and national economic impact of birders on a community and thought a birding trail would be a way to overlay eco-tourism to the existing diverse bird population in the Gulf Coast.

Hank Burch, manager of 5 Rivers, Alabama’s Delta Resource Center, is now the current manager of the trail. Burch says, “The original 50 sites on the trail included public and private sites that may have been good for birding, but some sites were odd choices to have visitors.” For example, a sod farm was originally listed as a site, but there weren’t any parking areas. A public boat ramp was also listed, which had a good view, but may not have been the best place for a site, says Burch.

Since taking over the trail maintenance in late 2011, Burch has worked to replace many of the private sites with sites that have better amenities for visitors. All sites have easily identifiable signs with an 800 number that visitors can call for more information. Burch is focusing on making sure each site is easily accessible to the public.

Once the trail is updated, Burch plans to focus on promoting the trail through social media and events associated with the trail. One existing event is the Alabama Coastal Birdfest, which is an annual four day fall event that draws 300 to 350 birders from 25-30 states. Burch thinks a similar event in the spring, to catch the northern bird migration, could be successful.

Alabama Coastal Birding Trail, http://alabamacoastalbirdingtrail.com/
Information provided by Hank Burch, Manager
5 Rivers – Alabama’s Delta Resource Center
30945 Five Rivers Blvd., Spanish Fort, AL 36527
251-625-0814 | hank.burch@dcnr.alabama.gov
Kentucky Trail Town Program: Case Study

In 2011, the Kentucky Office of Tourism began to look at the towns along the Sheltowee Trace and the Daniel Boone National Forest (DBNF) as potential locations to become Trail Towns. Through the Trail Town Program, the state will advise towns on developing links to nearby trails and rivers, or on building new trails, and then will help promote the communities and their businesses. 119

According to an August 22, 2012 press release, “The program includes helping communities develop signs directing hikers and others to local services and attractions, so outdoor enthusiasts will know what is available, and the community can benefit from the visitors' spending.” 120

“The most important part of Trail Towns is that each community decides what approaches it wants to take to tie in the trail system and other services that trail users need,” Tourism, Arts and Heritage Secretary Marcheta Sparrow said. “These communities can work together and share ideas while at the same time they develop their downtowns and Main Streets.” 121

The Kentucky Office of Tourism has created a Trail Town How-To Guide, available at:

www.kentuckytourism.com
502.564.4270
Office for Adventure Tourism, Kentucky Trail Town Program
500 Mero Street, 24th Floor, Frankfort, KY 40601

120 Ibid.
Appendix E: Contact Information for Potential Resources and Network Participants

1. Rachael Carter, Miss Lou Rural Tourism Association, 662-325-1619
2. Tim McCarley, BluzCruz, 601-634-0298
5. Jonathan Crisp, American Ecotourism Society, 901-833-7570
6. John Ruskey, Quapaw Canoe Company, 662-627-4070
7. Cathleen Collet, Tennessee Preservation Trust, 615-963-1255
14. Jon Summers, Mississippi River Water Trail, 636-899-0094
15. Hank Burch, Alabama Coastal Birding Trail, 251-625-0814
17. Munnie Jordan, Delta Heritage Tours, Mississippi River Trail, King Crimson Blues Festival, 870-338-8972
19. Larry Jarrett, Mississippi River Institute, 662-489-9708
20. Amy Evans, Southern Foodways Alliance, 662-915-5993
22. Sarah McCullough, Bureau of Film and Cultural Heritage Development, Mississippi Development Authority / Division of Tourism, 601.359-3297
23. Kate Williams, Northern Forest Canoe Trail, 802-496-2285
24. Dennis West, Northern Initiatives U.P., 906-226-1671
25. Debra Reduer, Atchafalaya Heritage Area, 225-219-0768
26. Dora Ann Hatch, LSU AgCenter, 318-927-9654 Ext. 229, dhatch@agcenter.lsu.edu, www.lsuagcenter.com/agritourism
27. Meg Cooper, Lower Delta Partnership, 662-873-6261, megldp@bellsouth.net, http://www.lowerdelta.org/
28. Glenn Cox, Mississippi River Corridor – Tennessee, 901-278-8459, wglenncox@comcast.net, http://www.msriverTN.org
29. Diana Threadgill, Mississippi River Corridor – Tennessee, 901-278-8459, dianathreadgill@comcast.net, http://www.msriverTN.org
30. Kevin Pierson, National Audubon Society, 479-527-0700, kpierson@audubon.org
Appendix F: State Maps Showing Counties Included in Report.