

Engel Stadium

Tourism Feasibility Assessment

Andrew W. Bailey, Ph.D.



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Engel Stadium Tourism Assessment

Engel stadium is a unique piece of the culture and history of the Chattanooga area. Its convenient location, generous acreage, and accessible parking render it a desirable piece of property, suitable for a variety of purposes. Sport tournaments, special events, university athletics, and public park space would be ideal uses for such a venue. While all of these activities can coexist with relative harmony in this single location, they all neglect the one aspect that makes Engel stadium unique- its **story**. Any similar facility can serve as a venue for tournaments and special events. Engel can also convey a rich and colorful history of the Chattanooga area, minor league baseball, and the “King of Baseball”, Joe Engel. If this story is lost in the debate surrounding Engel’s future as an event facility, it would be a loss for the community as a connection to our past and as a tourist destination. This document will provide information regarding the economic impact of tourism, evidence to support the potential of Engel stadium as a tourist destination, and preliminary recommendations for tourism planning.

Tourism

Economic Impacts

Tourism accounts for about 10% of global Gross Domestic Product. In the U.S. one in ten jobs is dependent on the tourism industry, bolstered by an annual direct impact of almost \$813 billion in travel expenditures (US Travel Association, 2012). Tennessee attracts 1.9% of all travel expenditures in the U.S., hosting about 54 million tourists who generate over \$16 billion in direct economic impact and \$1.2 billion in state and local taxes (TTC, 2013). In 2012, Tennessee received a 6% increase in leisure travelers, who stayed longer and spent more than in 2011 (TDTD, 2013). With a return on investment of \$19 for every dollar spent on advertising, investment in the tourism industry is a lucrative business strategy.

Hamilton County has emerged as a popular tourist destination, ranking 4th in the state and surpassing Knox County for the first time in 2012. The region benefited from nearly \$1 billion in domestic travel expenditures with nearly \$70 million in state and local tax receipts. Growing visibility in an expanding travel market bodes well for tourism in the region.

Being cognizant of the significant impact of tourism on the TN economy, Governor Bill Haslam commissioned the Tennessee Tourism Committee in 2011 to create a roadmap for the enhancement of tourism in the state (TTC, 2013). Central to the mission of this committee are: increased investment in tourism promotion and attracting visitors with the unique story of our state. It is evident that tourism benefits the local economy and key figures are taking notice.

The TN Traveler

Tourism marketing should be catered to descriptive statistics of those frequenting the region. The Tennessee market is dominated by Boomer (32%) and GenX (32%) travelers.

These two groups are of particular interest, as GenXers are the largest group of leisure travelers, while Boomers typically spend more per trip than average (\$542 versus \$445) and spend more on historic travel in TN than in other destinations (D.K. Shiflet, 2012). In fact, all visitors to TN are twice as likely to travel for sustainable and history travel than for other destinations (TDTD, 2013). This number is especially encouraging for a historical venue such as Engel Stadium.

The majority of travelers to TN (43.6%) also live in the state, with Georgia (6.8%), Kentucky (6.3%), and Alabama (5.9%) representing the largest percentage of non-resident visitors (TDTD, 2013). Almost all (94%) of travel to Tennessee is by auto, with an average one-way travel distance of 220 miles. The top five activities for tourists while in the state include: Shopping (30%), Dining (25%), Sightseeing (14%), National/State Parks (12%), and Historic sites (11%). Figure 1 illustrates those activities for which participation levels are higher in TN than in other destinations (D.K. Shiflet, 2013). Figure 2 presents the average household income of TN tourists compared to national and regional averages.

Tennessee Activity Index

ACTIVITY PARTICIPATION

The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in Tennessee are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for average U.S. destinations.

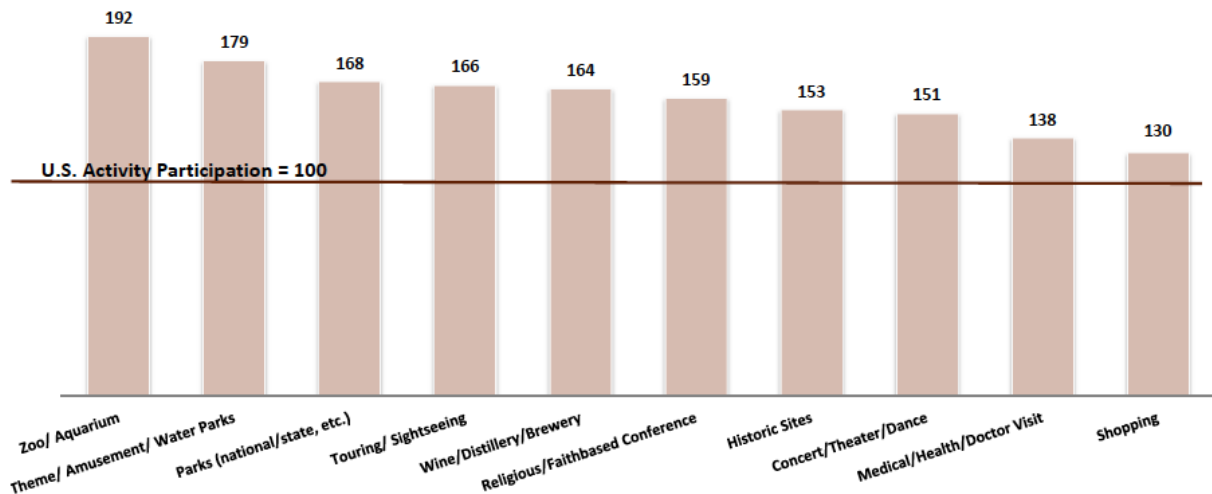


Figure 1. Popular tourist attractions in TN compared to the national average

Household Income Distribution: U.S., Tennessee and Competitors

DEMOGRAPHICS

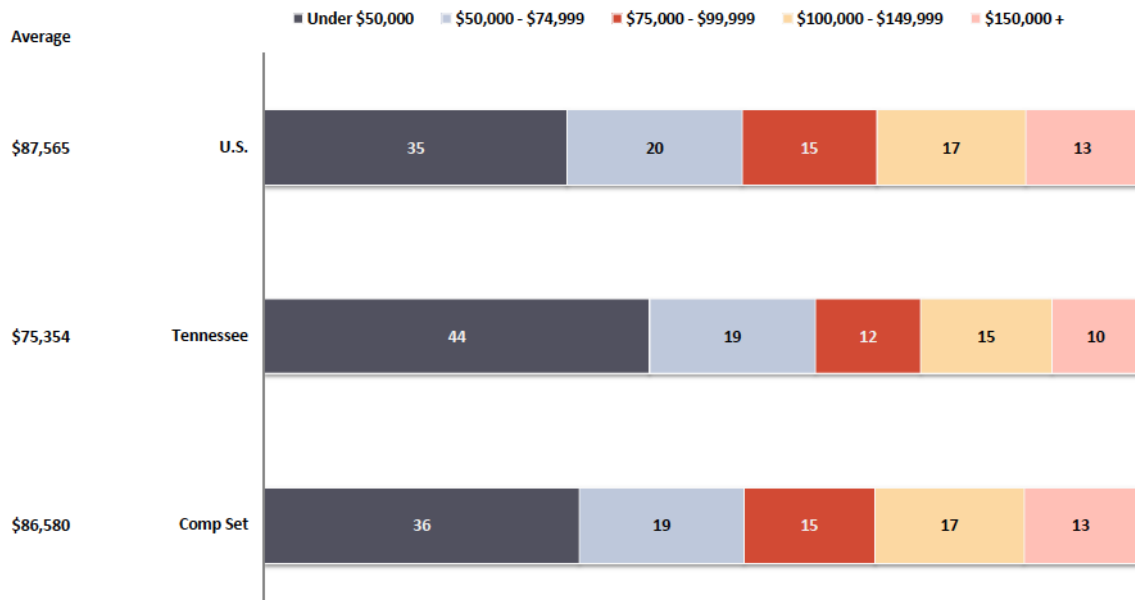


Figure 2. Average income of tourists to TN compared to the U.S. average and comparable states.

Hamilton County Attractions

Hamilton County is becoming renowned as a destination for a variety of tourist attractions. Attraction density plays a big role in bringing tourists to the region, as visitors will likely attend multiple venues during a single visit. Hamilton County's ascent to the 4th most visited county in the state is bolstered by the fact that it hosts 11 of the top 50 attractions in the state. Recent data collected by a volunteer for the Engel Foundation presents a picture of the tourism scene in the Chattanooga area.

Table 1. Popular Chattanooga tourist attractions and annual visitation rates.

Attraction	Annual Attendance
Chickamauga Battlefield	1,000,000
Chattanooga Choo Choo	750,000
Tennessee Aquarium	700,000
Rock City	400,000
Ruby Falls	400,000
Point Park	280,000
Creative Discovery Museum	210,000
Chattanooga Zoo	150,000
Tennessee Valley Railroad Museum	70,000
National Medal of Honor Museum of Military History	4,000
Hunter Museum of American Art	56,000
International Towing and Recovery Museum	50,000
Bessie Smith Cultural Center	5,000
John Ross House	1,600*

** Jan- Oct., 2013 only*

Of course, not all visits to these attractions were from out-of-town tourists. Many are locals who make repeated visits throughout the year. Regardless of their origin, these visits represent fee-paying participants that contribute to the economic sustainability of the venue. An understanding of tourism niches would enable one to estimate the potential overlap of tourists to these destinations who might also visit a historic venue like Engel Stadium.

Tourism Niche Markets

While averaged descriptors of travelers to the state provide a foundation for tourism marketing, a more focused approach would prove more practical for the assessment of Engel's tourism potential. This assessment includes an exploration of two market niches likely to have an interest in such a unique venue: Sport tourism, and Cultural Heritage tourism.

Sport Tourism

Sports are currently the largest category of leisure and one of the fastest growing tourism market niches. Though several definitions of sport tourism exist, it can generally be described as "leisure-based travel that takes individuals temporarily outside of their home communities to participate in physical activities, to watch physical activities, or to venerate attractions associated with physical activity" (Gibson, 1998, p. 49). Types of activities addressed in this niche include participation in or spectatorship of: amateur sport tournaments, major or minor league sports, outdoor recreation, and health and fitness activities. Given this broad definition, no narrow set of demographics can be applied. A recent report conducted by Ripken™ included potential revenues associated with tournaments and special events hosted at Engel Stadium, and those figures will not be reiterated here. That study, however, excluded any revenue generated from tourists interested in the Engel story.

While there are no current data that specifically address Engel stadium's potential as a draw for sports-related tourism, evidence can be garnered from a recent study conducted on Adventure Tourism in the Chattanooga area (Bailey, 2013). A random sample of visitors and locals attending events at the River Rocks festival in the month of October, 2013 completed surveys indicating in which type of activities they currently participate. Nearly one third (30%) of those surveyed indicated that they enjoy visiting historical sites. In fact, visiting historical sites was second only to "walking outdoors" in total participant numbers. Furthermore, those who visit historical sites are also more likely to walk outdoors ($r = .246$), play traditional sports (e.g. baseball; $r = .105$), birdwatch ($r = .159$), and participate in cultural activities (e.g. music; $r = .130$). This indicates that the local sport tourism (e.g. adventure tourism) clientele overlaps significantly with potential Engel stadium tourists.

The River Rocks event during which these data were collected had an estimated attendance of 20,263 people. Given a 30% participation rate in historical site visitation, the market for Engel stadium tourists would be over 6700 people associated with this single event. These visitors stayed longer than the average visitor to TN and traveled with more people in their party. Thus, they would be an appropriate target market for a family-friendly venue.

Additionally, the City of Chattanooga estimates that 54,080 tourists came to the area in 2013 for softball/baseball tournaments. Based on the correlation of sport participants to historical site visitors from the study cited above (Bailey, 2013), there is an 11% overlap in sport and historical site participants. This highlights another market segment of 5,948 visitors to Chattanooga who would have an interest in the historical aspect of Engel

Stadium. It is likely that this overlap would be much higher if the data allowed for an assessment of baseball participants and their specific interest in an historic ballpark.

While there are no reliable data regarding visitors specifically interested in baseball culture and history, it should be noted that such a market niche does exist. The Engel Foundation recently received three requests to accommodate coach bus tours in the stadium. These requests were denied, given that Engel Stadium is not tourist-ready, but this shows that interest already exists. Certain coach bus tours already specialize in baseball themed travel (c.f. <http://www.broachsportstours.com/baseball/> & <http://www.bigleagueturns.com/about/>) and dedicated baseball “pilgrims” gather to discuss baseball travel and culture on the web (c.f. <http://www.baseballpilgrimages.com/>) and social networking sites. These results highlight a significant market overlap in sport and heritage tourism in our region. Cultural heritage tourists, though, would be the key target market for tourism to Engel stadium.

Cultural Heritage Tourism

The vast majority of tourists (71%) travel for leisure purposes, and over three-quarters (76%) of those tourists visit cultural heritage sites when traveling. Heritage tourism is the fastest growing segment of the tourism industry (Mandala, 2013). Typical cultural and heritage activities identified by travelers may include:

- Visiting historic sites (66%)
- Attending historical re-enactments (64%)
- Visiting art museums/galleries (54%)
- Attending arts & crafts fairs or festivals (45%)
- Attending professional dance performances (44%)
- Visiting state/national parks (41%)
- Shopping in museum stores (32%)
- Exploring urban neighborhoods (30%).

The National Trust for Historic Preservation describes today’s heritage traveler as:

- Well-educated – This is the most important factor influencing participation in cultural and heritage tourism.
- Older – Cultural heritage tourism peaks between ages 45 and 65, when people are at the height of their careers and earning power. As many baby boomers are retiring with discretionary time for travel, this demographic will be increasingly important.
- Influenced by women – Women often plan family vacations and control more personal discretionary income.
- Accountability-driven – Being well-seasoned and worldly travelers, these tourists are more discerning. They look for value for the dollar and experiences that will meet their expectations.
- Generous in spending – Visitors to historic and cultural sites spend more per day than other visitors. They tend to spend money on cultural (antiques, art), culinary (gourmet food & wine) and outdoor experiences (biking, hiking, canoeing, and bird watching).
- Interested in authenticity – They seek out experiences that are authentic in order to learn

about a community's history and culture. 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".

- Tend to stay longer, and visit a diversity of sites, cities, and regions than the average traveler.
- Want high quality services – The tourist looks for quality in infrastructure and services, as well as in program content.

Results from a recent sport tourism study (Bailey, 2013) largely support these descriptors. Those survey participants who visit historic sites had an average age of 45 (7 years older than non-participants), 66% were female, and the majority had a Bachelor's degree or higher. When asked which community enhancements would encourage them to visit more often, historical visitors favored developing a "more vibrant downtown," "more unique charm," "more cultural activities," and "more special outdoor events". These findings reinforce the notion that heritage tourists are seeking an authentic destination that affords a variety of experiences.

One final set of relevant descriptors comes from Mandela's (2013) list of cultural heritage (CH) traveler segments. These segments divide this niche market into five well-defined groups. "Passionate" CH travelers design trips around specific heritage destinations and account for about 13% of leisure travelers. The "Well-rounded" CH group (14% of travelers) are open to all types of activities while traveling, but aren't driven mainly by heritage destinations. "Aspirational" travelers (27%) desire to experience heritage sites, but have limited experience with these venues. The "Self-guided" segment (11%) take advantage of heritage sites while in the area, but don't plan out their trips with specific sites in mind. Finally, the "Keeping it light" travelers (11%) will attend heritage sites if there is something fun happening there (e.g. festivals, markets, etc.).

These segments highlight the diversity within the CH market niche. Only 13% of travelers represent the dyed in the wool heritage traveler stereotype. Others are open to these experiences as a part of their travel repertoire, but don't plan their vacations around these activities. This understanding is vital for heritage site planning, especially in the context of smaller venues such as Engel Stadium. The vast majority of travelers to the Chattanooga area may not come here specifically to visit the stadium, but 76% of leisure travelers may be interested in stopping by to hear about the Engel story and how it has contributed to the history and development of the Chattanooga region.

The Bottom Line

Forecasting tourism demand is a dangerous undertaking. Estimations will always be speculative, as one must rely on secondary data for support. We have made a special effort to produce conservative estimates, even though the tourism data for Hamilton County are promising. ***Given the recent estimation of yearly operating expenses for Engel Stadium, it is feasible that tourism alone could counter operational costs and render Engel stadium completely sustainable.*** This is not the entire plan for revenue generation. Neglecting such a lucrative market, though, would be a vast oversight.

Ripken's report estimated a 6-year graduated operating expense from \$230,000 to \$320,000 for the cost of maintaining the facility with a new grass field. Estimated revenue from tournaments and special events maxed out at \$230,000 for year 6, leaving a revolving deficit of nearly \$90,000. Thus, Ripken's estimations for renovating the stadium to accommodate only tournaments and special events would not lead to a sustainable funding model.

With an entry fee of \$10 per person, Engel stadium would need 30,000 visitors a year to cover Ripken's estimated operating expenses. This is a conservative entry fee, as the TN State tourism office recommended a rate of \$15 per person. Given the number of annual visits to other locations in Hamilton County, the type of tourists that are attracted to the region, and the overlap in tourism market niches, this is a very feasible number. Eleven percent of tourists to the state of TN visit historical sites. This statistic reflects actual participation in historical tourism, not intention to do so. Using only the figures from table one above, ***there would be a potential market of 454,850 visitors*** (11%) who are already in the area and *are* visiting historical sites. Engel would require less than 10% of that target market to cover annual expenses.

Many of those visits include locals who make repeated visits to the site. There is no reason to assume that locals wouldn't make repeated visits to Engel, given a unique and authentic experience. This figure can be considered very conservative, as it neglects the significant overlap of historical site visitors who are already in the area (e.g. Railroad Museum, Choo Choo, Towing Museum, etc.). The overlap with these historic sites could be much higher than 11%. It also neglects the 30% overlap with sport and adventure tourism, which brings hundreds of thousands of tourists to the Chattanooga area every year.

Table 2 illustrates the potential overlap in tourism for Engel compared to popular attractions in Chattanooga. A metric of 11% was used for general tourists, as that is the real amount of all tourists to TN that visit historic sites. For historic sites, an overlap of 52% was assumed. This is based on the fact that these visitors are Cultural Heritage tourists by definition. Using the segments of Cultural Heritage travelers as described above, the "Well-rounded," "Aspirational," and "Self-guided" tourists are the most likely groups to visit Engel. These groups account for 52% of tourists as described by those segments. Chickamauga Battlefield and Point Park remained at a conservative 11% because those visitors are likely "Passionate" Cultural Heritage travelers, who plan their trip around those specific sites.

Table 2. Estimated overlap required for each site to cover all operating costs with a \$10 entrance fee.

Attraction	Annual Attendance	Estimated Overlap	Potential # overlapping visitors	Actual Overlap needed
Chickamauga Battlefield	1,000,000	11%	110000	3%
Chattanooga Choo Choo	750,000	52%	390000	4%
Tennessee Aquarium	700,000	11%	77000	4%
Rock City	400,000	11%	44000	8%
Ruby Falls	400,000	11%	44000	8%
Point Park	280,000	11%	30800	11%
Creative Discovery Museum	210,000	11%	23100	14%
Chattanooga Zoo	150,000	11%	16500	20%
Tennessee Valley Railroad Museum	70,000	52%	36400	43%
National Medal of Honor Museum of Military History	4,000	52%	2080	750%
Hunter Museum of American Art	56,000	11%	6160	54%
International Towing and Recovery Museum	50,000	52%	26000	60%
Bessie Smith Cultural Center	5,000	52%	2600	600%
John Ross House	1,600	52%	832	1875%
River Rocks Festival	20,263	30%	6078.9	148%
City Baseball Tournaments	54,080	11%	5948.8	55%

The final column labeled “Actual overlap needed” illustrates the real percentage of annual visitors Engel would need to share with each site to cover all operating expenses. It should be noted that each cell in the final column would single-handedly cover Engel’s expenses. For example, a 3% overlap with Battlefield visitors would cover Engel’s operating expenses in totality. Partnerships with those attractions that are most relevant to Engel stadium would be a vital component to a successful marketing strategy.

Strategies and Implications

Tourism is a robust and growing industry at the national, state, and county levels. Chattanooga is a burgeoning destination for travelers of all types, and especially for those discerning, educated, adventurous tourists looking for unique and authentic experiences. As more and more visitors convey the Chattanooga story to friends and relatives, and as our national marketing strategies become more sophisticated, the market for local attractions will continue to escalate. The key to survival for any attraction is a multi-faceted approach that will draw in a variety of locals and tourists across all seasons. Engel Stadium has the potential to benefit locals and visitors as a green space, private park, tournament and special event facility, and as an authentic piece of local history that promotes pride and a sense of place. Even if Engel's tourism component doesn't render it completely sustainable, it can certainly be a valuable piece of the puzzle. Given the overall tourism climate and the market analysis for sport and heritage tourists, the following recommendations should be considered. These recommendations are based on the 5 principles of the National Trust for Historic Preservation.

1) *Find the right fit:*

Engel's location and facility make it a potential venue for a variety of purposes. If Joe Engel were alive today, he would likely promote its use for all feasible events and activities. The most difficult aspect of this ballpark renovation may be defining its purpose. A good starting point would be the mission of the Engel Foundation:

The mission of The Engel Foundation is to restore, preserve, promote, and revitalize Historic Engel Stadium as a center for baseball and community life through education, history, culture, entertainment, events, social programs, and other sports-related activities for all to participate and enjoy.

This mission is appropriately broad, given Engel's history. The immediate concern would be to establish a unique brand for Engel that meets all of the purposes listed above. A guiding principle could be to ensure that all activities are welcome as long as their inclusion doesn't interfere with the potential for other activities. For example, sport tournaments should be a part of the program mix, but renovating Engel in a way that ignores its historic component would interfere with its potential as a tourism destination.

2) *Tell your own Story:*

As previously mentioned, Cultural Heritage tourists are seeking uniqueness and authenticity. Engel is not just another ballpark. It is a place that contains stories of Chattanooga's past and a central part of the community's history. Engel's past is interwoven with stories of the depression, World War II, the civil rights movement, and the glory days of baseball when giants roamed the field and thousands came to witness. To create a venue that will attract tourists, Engel will need to tell that story with all of its complicated humanity. It must stand out as a venue with enough character to draw in wandering tourists and Chattanoogaans looking for a connection to their past. All of the figures presented in this document are dependent on the ability of this venue to convey that unique story.

The National Trust for Historic Preservation encourages organizers to follow three steps to insure the right fit for a heritage tourism site (c.f. <http://www.preservationnation.org/>):

A) Organizers must solicit feedback from local residents about their concerns and interests in developing a cultural heritage tourism program.

B) Organizers should enlist local residents to not only provide information, but to become involved in the process – serving on committees, volunteering as tour guides, participating in hospitality training, sponsoring special events and other ways to contribute to the program.

C) Organizers must follow up on concerns expressed by local residents. It is critical to not only collect information, but to gather participants again to provide a plan for responding to any concerns.

3) *Preserve and Protect your Resources:*

Visitors will not likely venture out to see a run-of-the-mill modern baseball field. Tourists will pay to experience a walk into history, and to make a connection with the past. Any renovations that would greatly alter the historic character of Engel Stadium will hinder tourism. It may turn out that this is a necessary evil in the effort to establish a sustainable funding model. However, such decisions should be made with a clear understanding that much of Engel's brand equity is contained in its historic character. Based on figures presented in this and other reports, it is possible that more revenue would be generated as a tourist attraction than as a functioning sport tournament site. An ideal scenario would incorporate both, with a respect for the value of the Engel story.

Protests are often made regarding the renovation costs associated with maintaining a venue's historic character. However, renovating older buildings to retain their historic character actually generates a better long-term return on investment. Consider the following findings from previous heritage tourism studies (Shiple, 2000; Shiple, Parsons & Utz, 2005; CMHC, 2006a, CMHC 2006b):

- Historic rehabilitation creates local, high-paying jobs for highly skilled workers. As opposed to new construction, which is often contracted out to the cheapest bidder using materials shipped from all over the world, historic renovations tend to be done with local labor and materials.
- Historic renovation is "green". Energy savings associated with using existing materials rather than manufacturing new, energy-efficient materials almost always results in environmental savings. For example, the energy expended to produce new windows ship, and install them almost always exceeds overall energy lost through old windows.
- Renovations drive investment in low-income neighborhoods. This has already been demonstrated in the Northshore and Southside areas of Chattanooga. Revitalization of the 3rd street corridor could begin with investment in Engel stadium.
- Designated heritage properties perform better in the real estate market. 59% of designated heritage properties have higher property values than average and another 15% have average property values. 47% of heritage properties increased in value during the recent market downturn with another 32% performing the same

as average. While resale value is not a priority for UTC and the Engel Foundation, it is reassuring to know that capital investments will retain their value, and potentially lessen mortgage debts.

- Renovating existing structures is less disruptive of the surrounding community than demolition and new construction.
- Even when the actual cost of renovation is higher than new construction, there is a higher return on investment due to high rent or lease prices. In Engel's case, this would refer to the potential lease of property for food service, events, etc.

4) ***Make Tourism Sites come Alive:***

Telling the Engel story is a vital component in the development of a thriving tourism destination. The old museum model of housing artifacts behind glass walls, however, may not be the ideal model for Engel. Of course, those artifacts do exist and should be displayed as part of the attraction. Repeatedly attracting locals, visitors, and families will require an interactive experience. This is likely where the breakdown in communication will occur when conveying the dream of a baseball museum. It is tough to imagine more than 30,000 visitors paying \$10 each to walk through a hallway of baseball memorabilia. Baseball, however, is not the only or even the main attraction at Engel. Joe Engel's antics are legendary and any museum bearing his name should invoke the flare and excitement associated with his name.

Many visitors, especially the older heritage tourists, will come to connect with stories of the past. Generating return visits, however, requires the generation of new stories. A dusty room full of artifacts will draw a small niche of tourists. Artifacts, combined with modern day attractions, public open space, a pub, and regular events will bring repeated visits.

5) ***Collaborate with Partners:***

Engel is far from being the only attraction in the Chattanooga area. The Visitor's Bureau estimates 3.1 million tourists make their way through the region every year, searching for something new, unique, and interesting to engage with. Table 1 presents a few of the successful attractions in the Hamilton County area. Many more are promoted through the Visitor's Bureau. Collaboration with other attractions will benefit all venues. Talks regarding collaboration between the Chattanooga Zoo, the Railroad Museum, and the John Henry Sculpture Park are already underway. This could provide a unique partnership of tourist sites connected through a railroad corridor. The railroad, being a major part of Chattanooga's identity, would be a unique and authentic way to tie these destinations together. Ideally, a partnership involving market reciprocity could be established, whereby relevant attractions advertise for one another.

Another successful strategy would be the promotion of a CityPass, similar to that offered by larger cities (c.f. <http://www.citypass.com/seattle>). This pass allows tourists to visit a limited number of popular sites for a steep discount. Thus, visitors who are unwilling to pay the full price of admission for the Engel Stadium would be able to go there and 5 other venues for nearly half the retail price of tickets if bought separately. An historical CityPass could capitalize on the interest of Cultural Heritage travelers to the area, while a mixed CityPass could bring in tourists who are less passionate about heritage tourism. Greater collaboration would be a way to utilize Chattanooga's attraction density as a valuable asset.

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