

[Return to Home Page](#)

National Register Listings (Excluding Archaeological)

NR Listings Found: 3

PONTOTOC COUNTY

LOCHINVAR

Listing Date: 13 Mar 1986

City: Pontotoc

PONTOTOC (DISTRICT)

Listing Date: 29 Oct 1993

City: Pontotoc

SITE OF THE TREATY OF PONTOTOC CHICKASAW COUNCIL HOUSE SITE

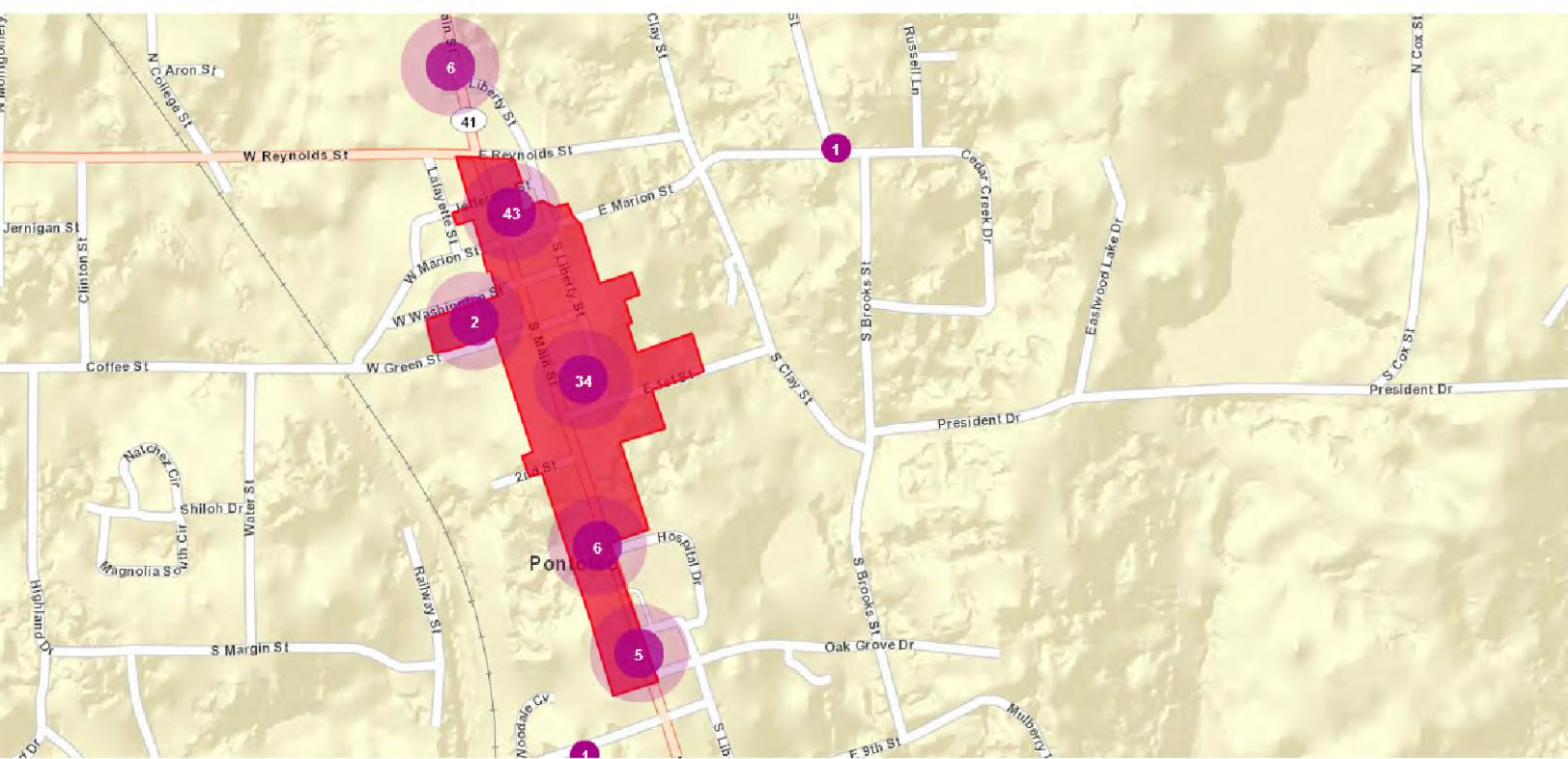
Listing Date: 27 Jul 1973

City: Pontotoc

Note: A gray/blue background color denotes a non-extant property.

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National Register Listings (Excluding Archaeological)

NR Listings Found: 1

PRENTISS COUNTY

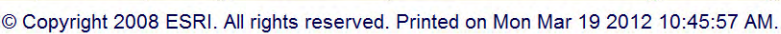
DOWNTOWN BOONEVILLE (DISTRICT)

Listing Date: 05 Nov 1998

City: Booneville

Note: A gray/blue background color denotes a non-extant property.

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National Register Listings (Excluding Archaeological)

NR Listings Found: 11

TATE COUNTY

COLLEGE STREET (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

DOWNTOWN SENATOBIA (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

MCGEHEE PLANTATION HOUSE

Listing Date: 03 Jul 2007
City: Senatobia

NORTH PARK STREET (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

OLD FIRST CHRISTIAN CHURCH (LATVIAN LUTHERAN CHURCH)

Listing Date: 30 Mar 1994
City: Senatobia

PANOLA STREET, NORTH (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

PANOLA STREET, SOUTH (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

SOUTH WARD STREET (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

SOUTHEAST SENATOBIA (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

TATE COUNTY AGRICULTURAL HIGH SCHOOL (DISTRICT)

Listing Date: 31 Mar 1994
City: Senatobia

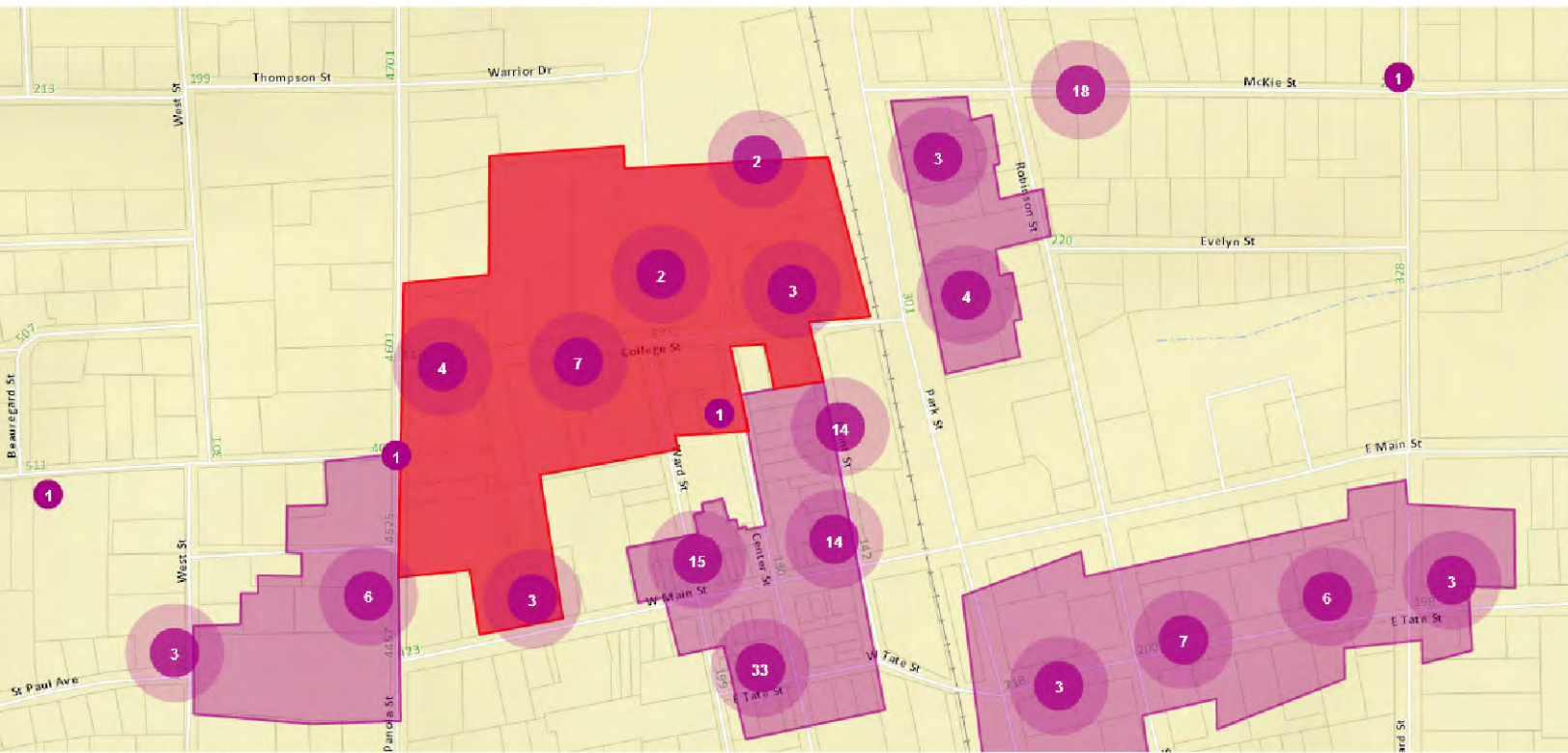
TATE COUNTY COURTHOUSE

Listing Date: 30 Mar 1994
City: Senatobia

Note: A gray/blue background color denotes a non-extant property.

Flex Viewer

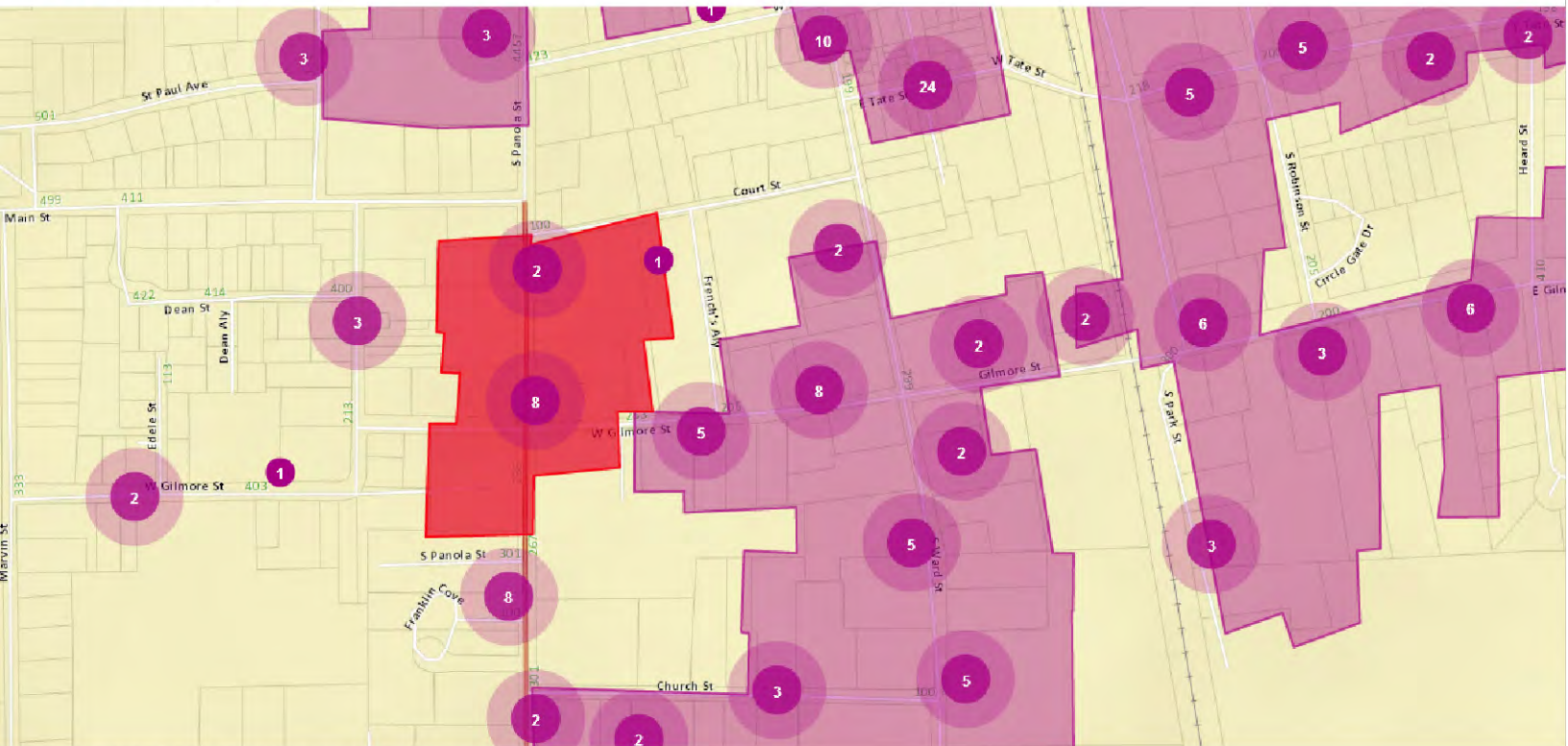
Powered by ArcGIS Server



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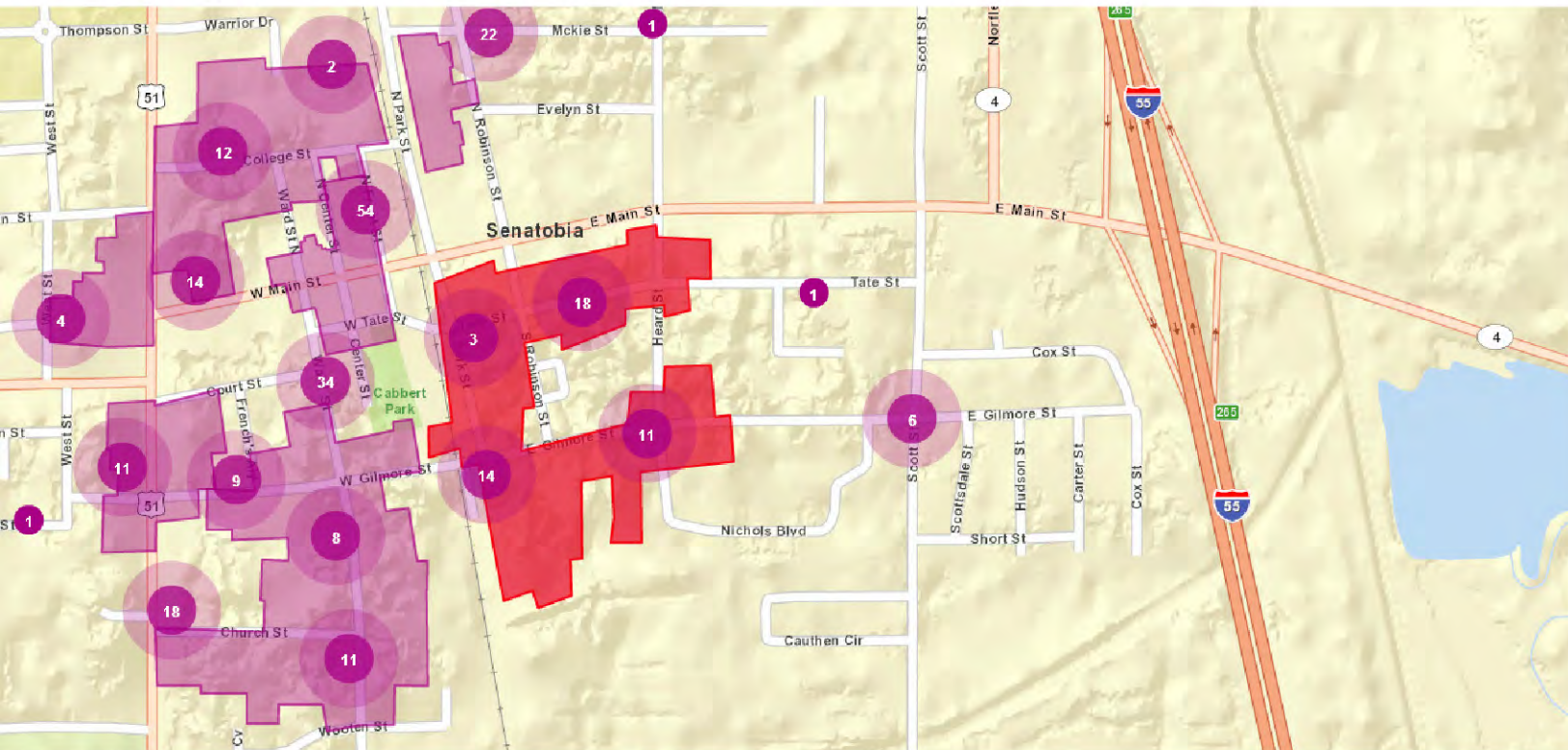
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Flex Viewer

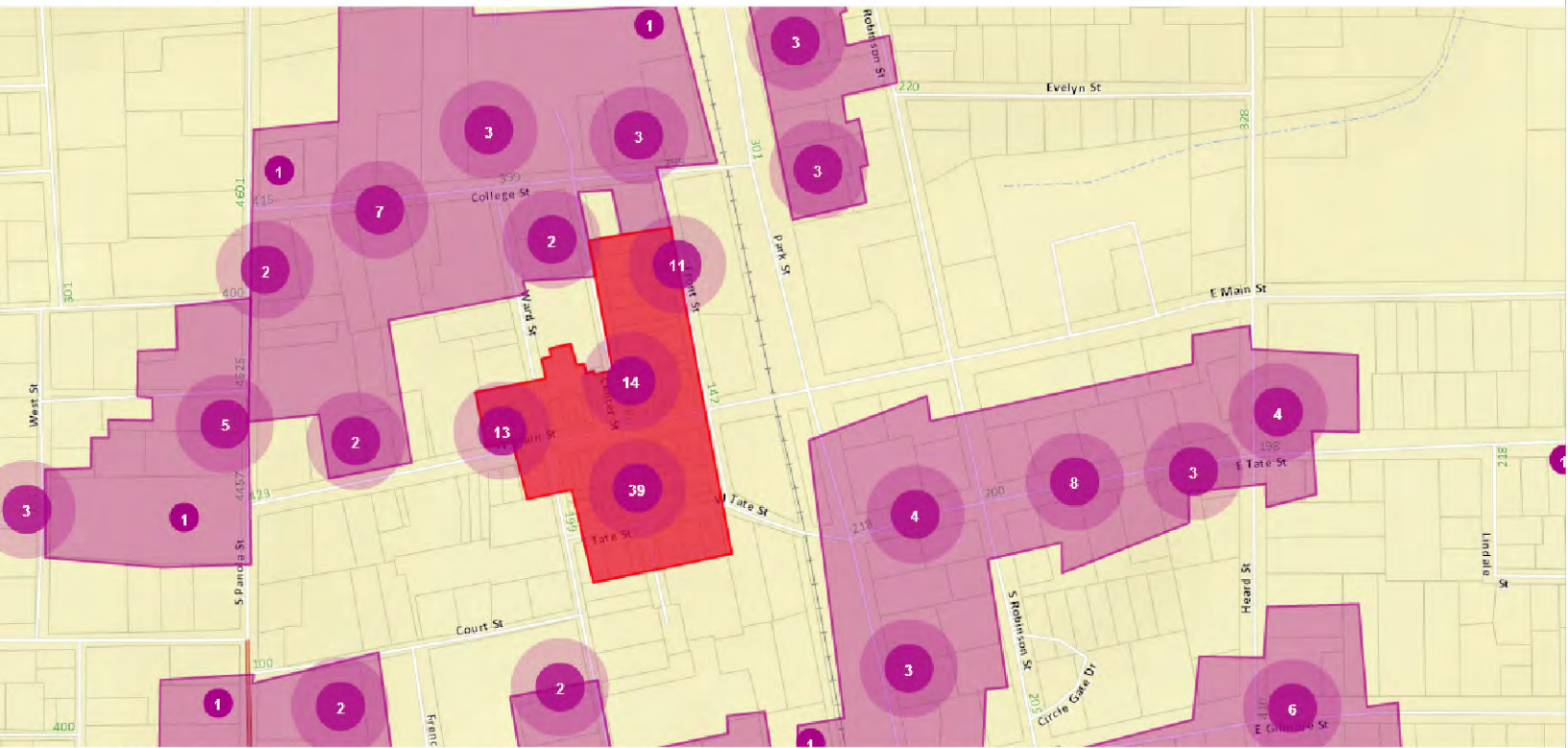
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Flex Viewer

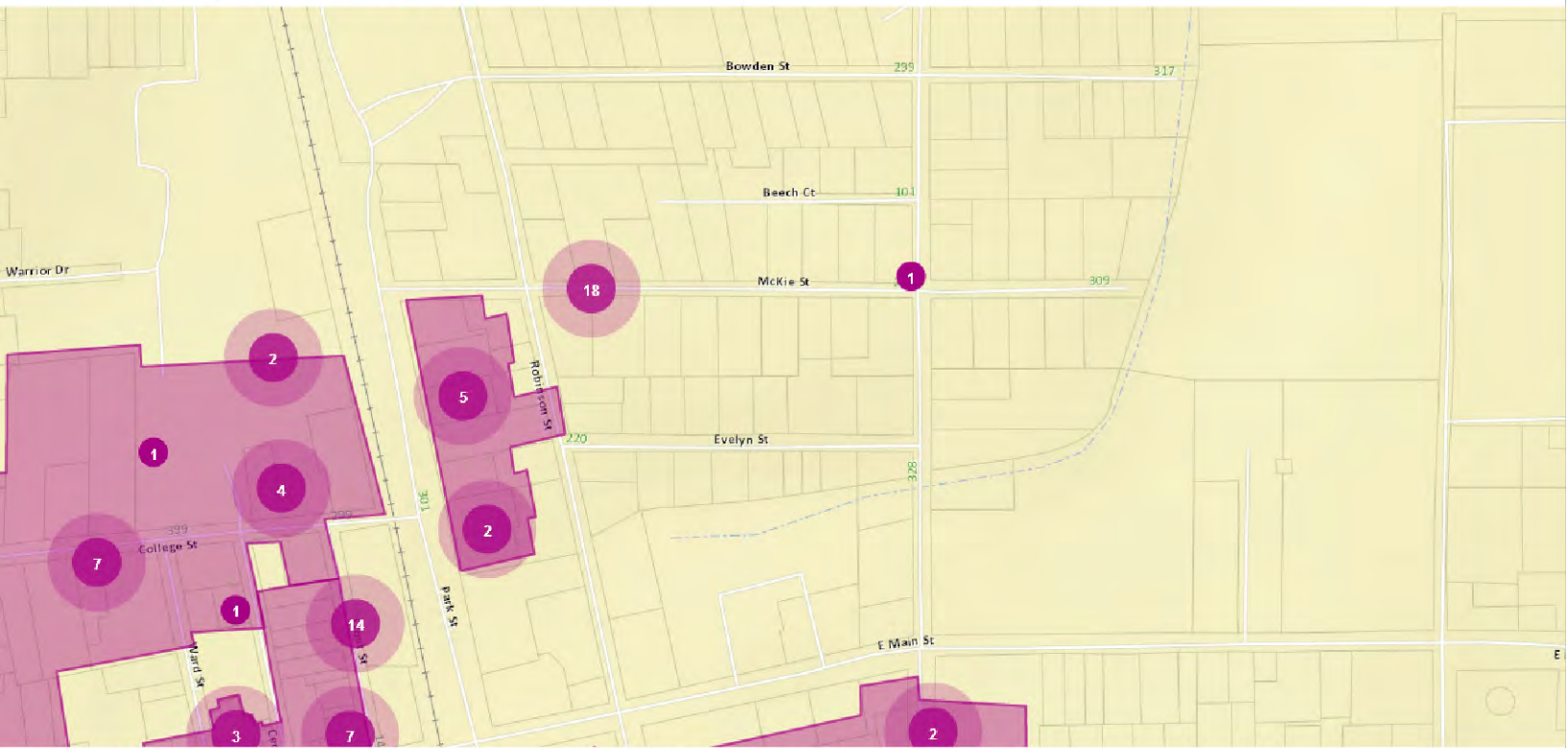
Powered by ArcGIS Server



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Flex Viewer

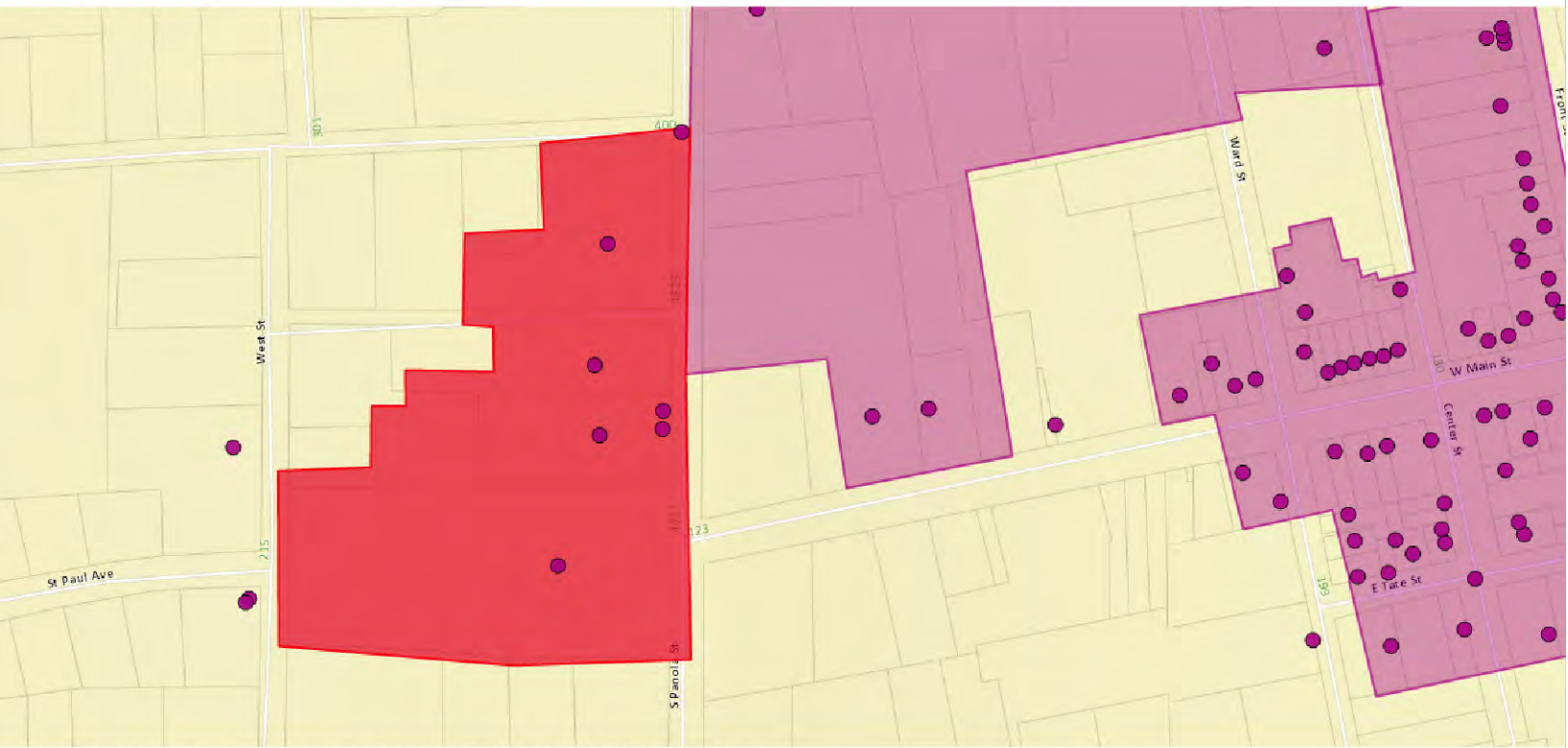
Powered by ArcGIS Server



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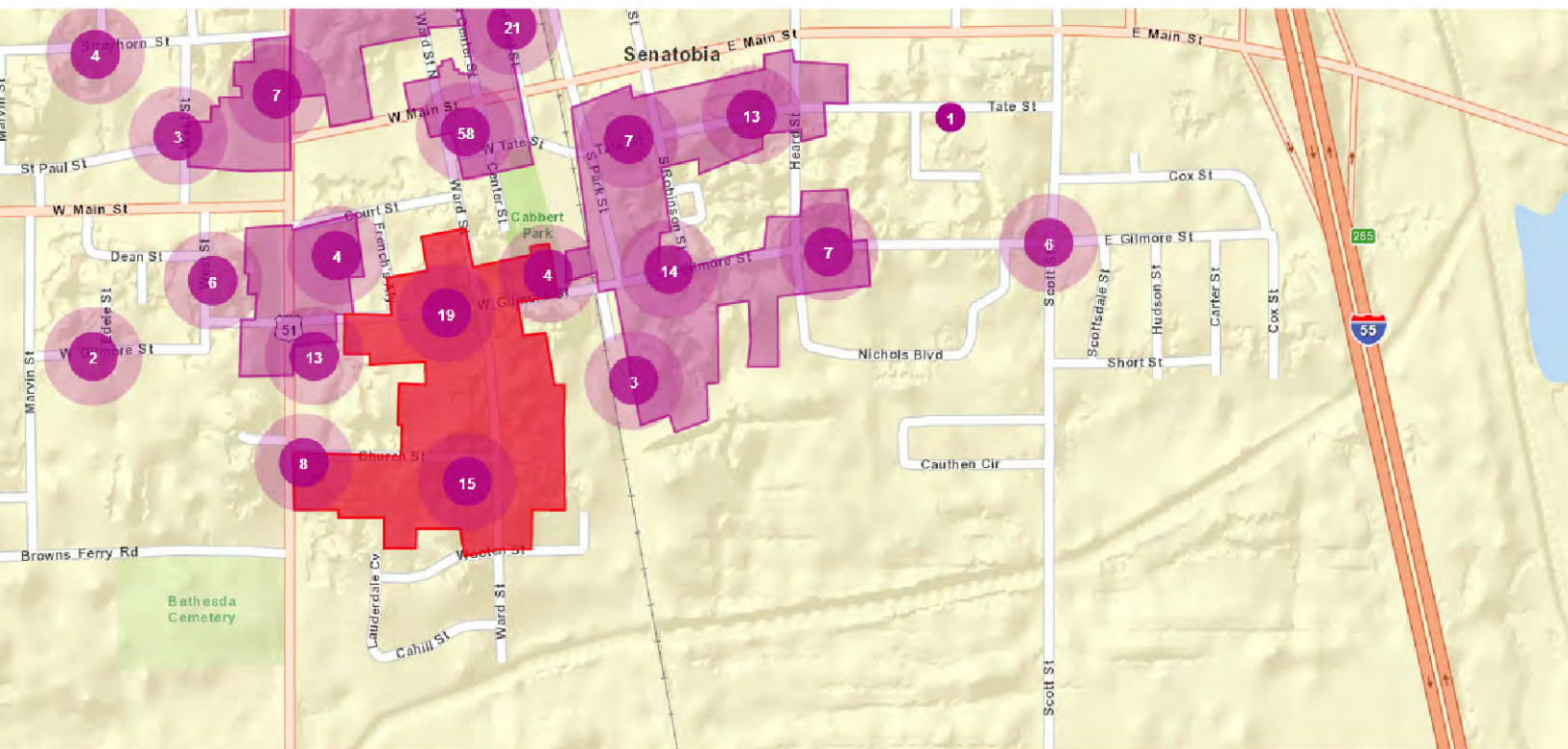
Flex Viewer

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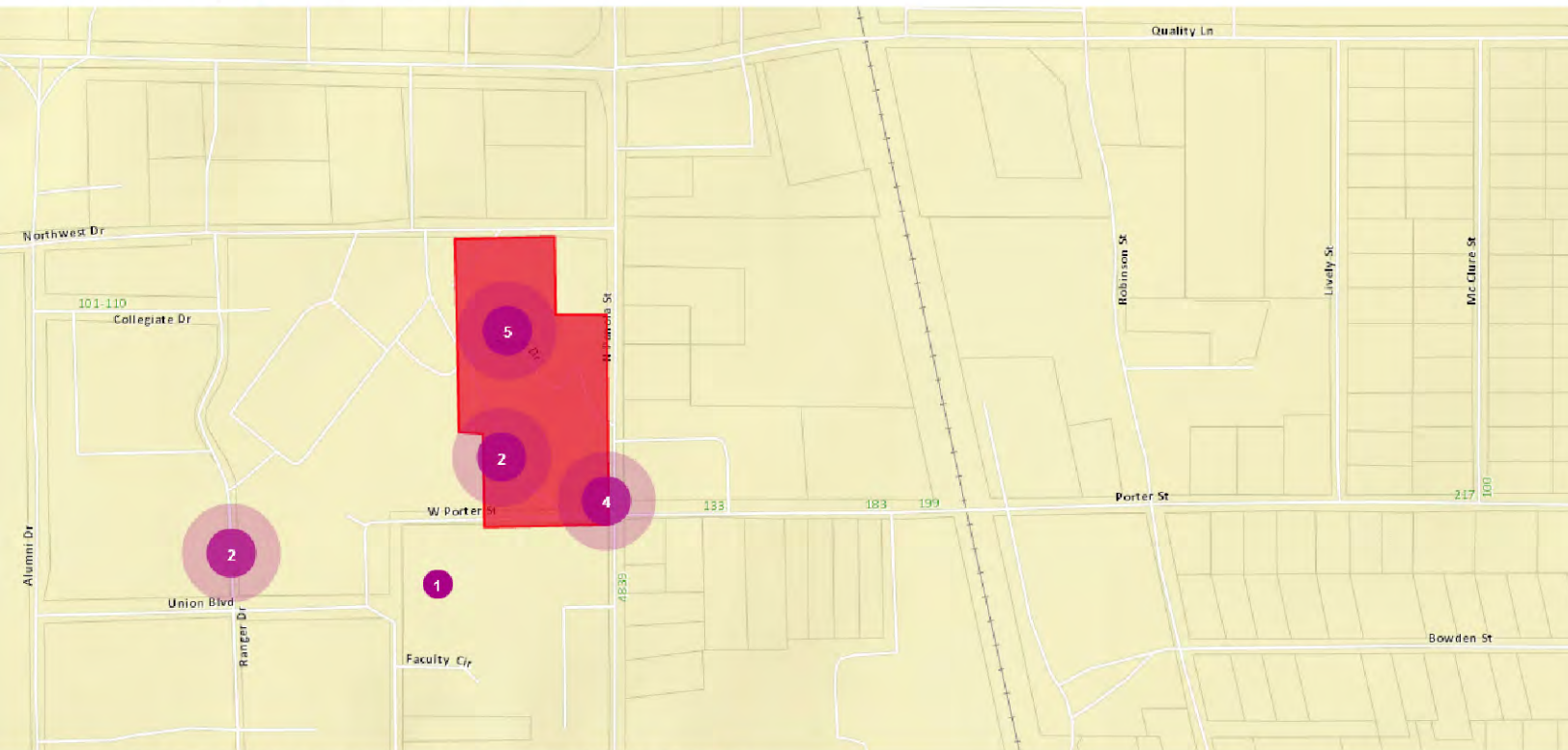
Powered by ArcGIS Server



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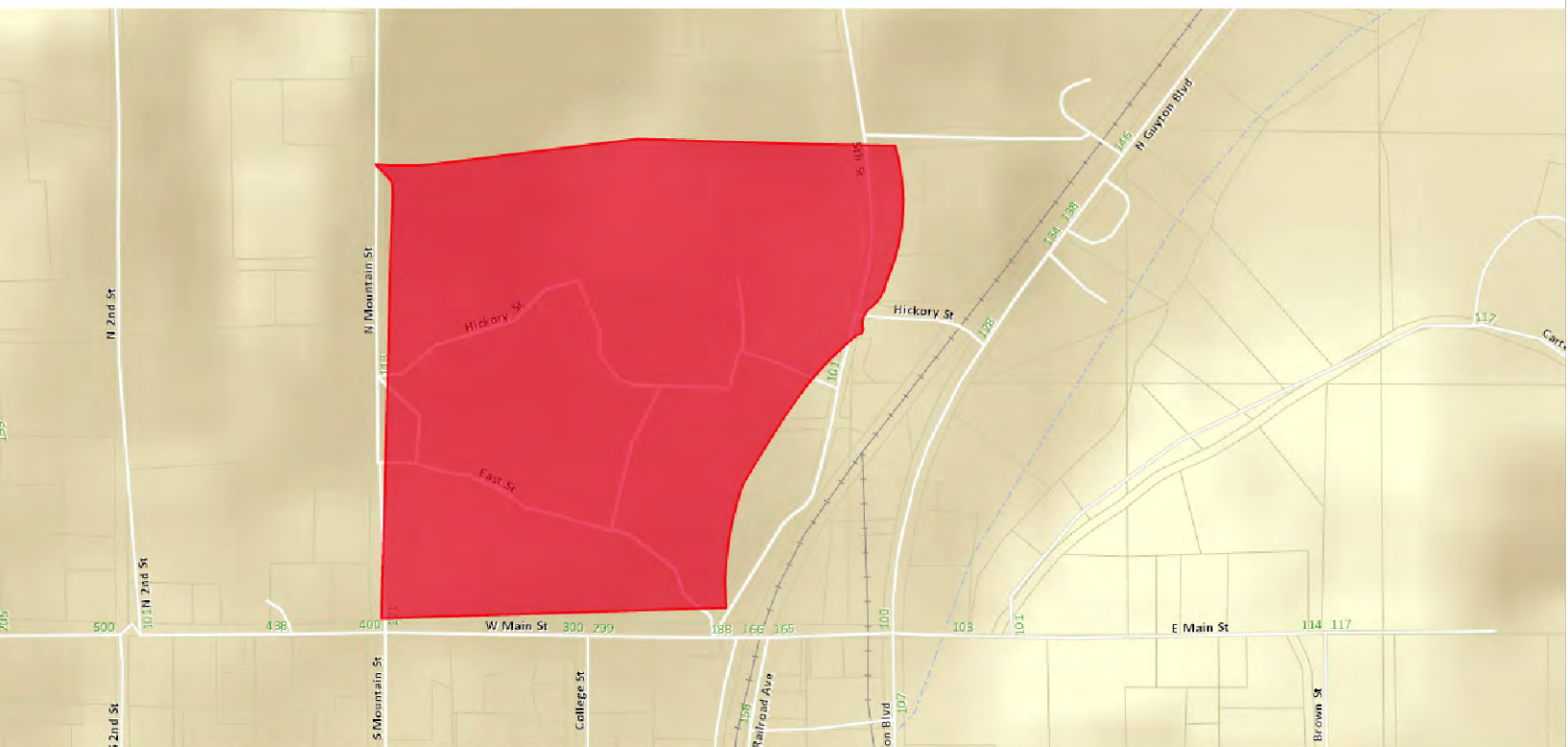
Flex Viewer

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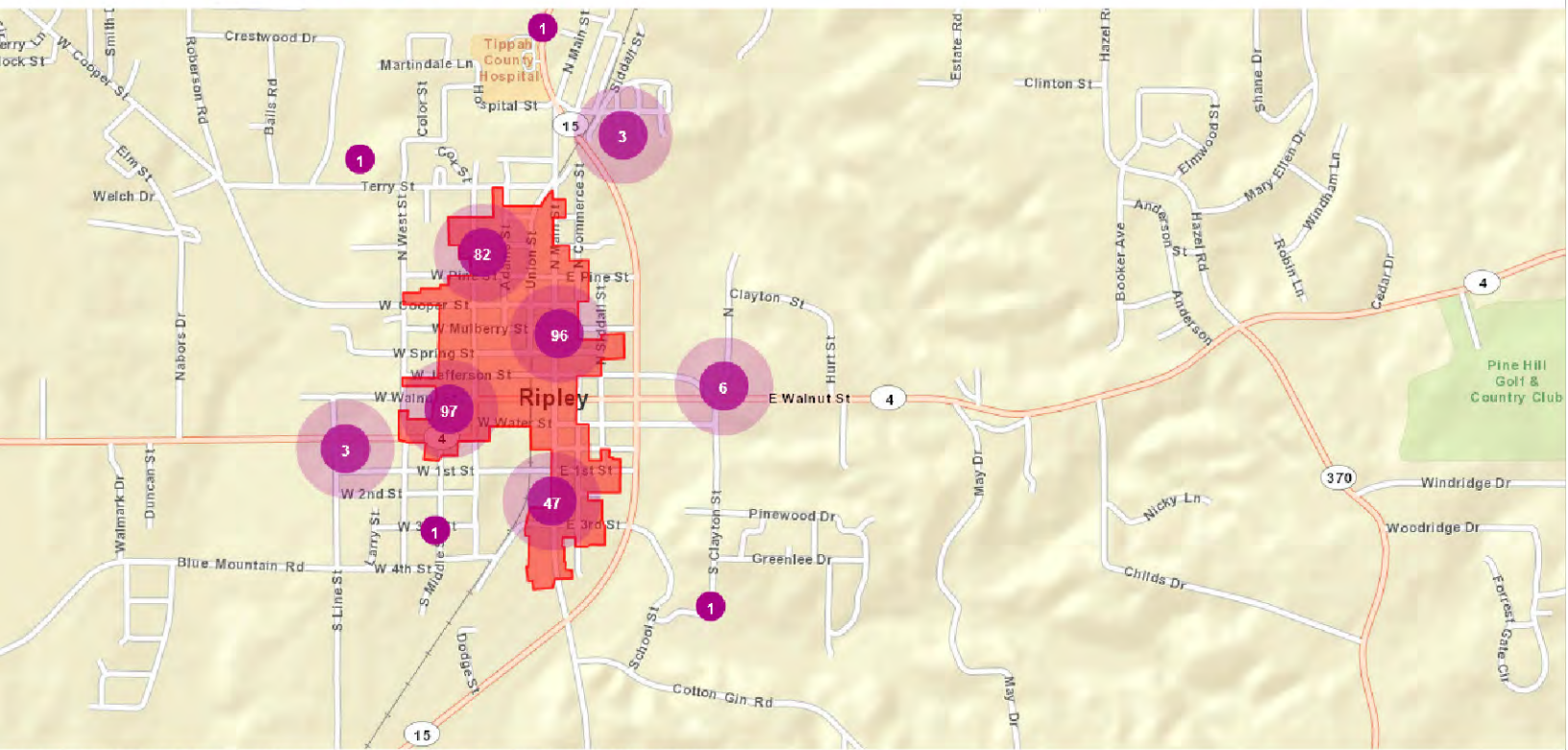
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National Register Listings (Excluding Archaeological)

NR Listings Found: 16

TISHOMINGO COUNTY

BEAR CREEK FISHWEIR #2

Listing Date: 10 Apr 2007
City: Tishomingo

CENTRAL IUKA (DISTRICT)

Listing Date: 01 Nov 1991
City: Iuka

CHURCH OF OUR SAVIOR EPISCOPAL

Listing Date: 09 Aug 1991
City: Iuka

EDWARDS, R. D., HOUSE

Listing Date: 09 Aug 1991
City: Iuka

HAMMERLY HOUSE

Listing Date: 09 Aug 1991
City: Iuka

IUKA BATTLEFIELD

Listing Date: 14 Nov 2007
City: Iuka

J. C. JOURDAN HOUSE

Listing Date: 09 Aug 1991
City: Iuka

J. H. DOAN HOUSE

Listing Date: 09 Aug 1991
City: Iuka

J. M. COMAN HOUSE, GOVERNOR JOHN M. STONE HOUSE (TWIN MAGNOLIAS)

Listing Date: 09 Aug 1991
City: Iuka

JAMES DAVIS HOUSE

Listing Date: 09 Aug 1991
City: Iuka

MERRILL-NEWHARDT HOUSE

Listing Date: 09 Aug 1991
City: Iuka

OLD TISHOMINGO COUNTY COURTHOUSE (TISHOMINGO COUNTY ARCHIVES & HISTORY MUSEUM)

Listing Date: 11 Apr 1973
City: Iuka

R.C. BRINKLEY HOUSE (DUNROBIN)

Listing Date: 26 Apr 2002
City: Iuka

REID HOUSE

Listing Date: 09 Aug 1991
City: Iuka

STONE-REID HOUSE

Listing Date: 09 Aug 1991
City: Iuka

TISHOMINGO STATE PARK (DISTRICT)

Listing Date: 26 Mar 1998
City: Tishomingo

Flex Viewer

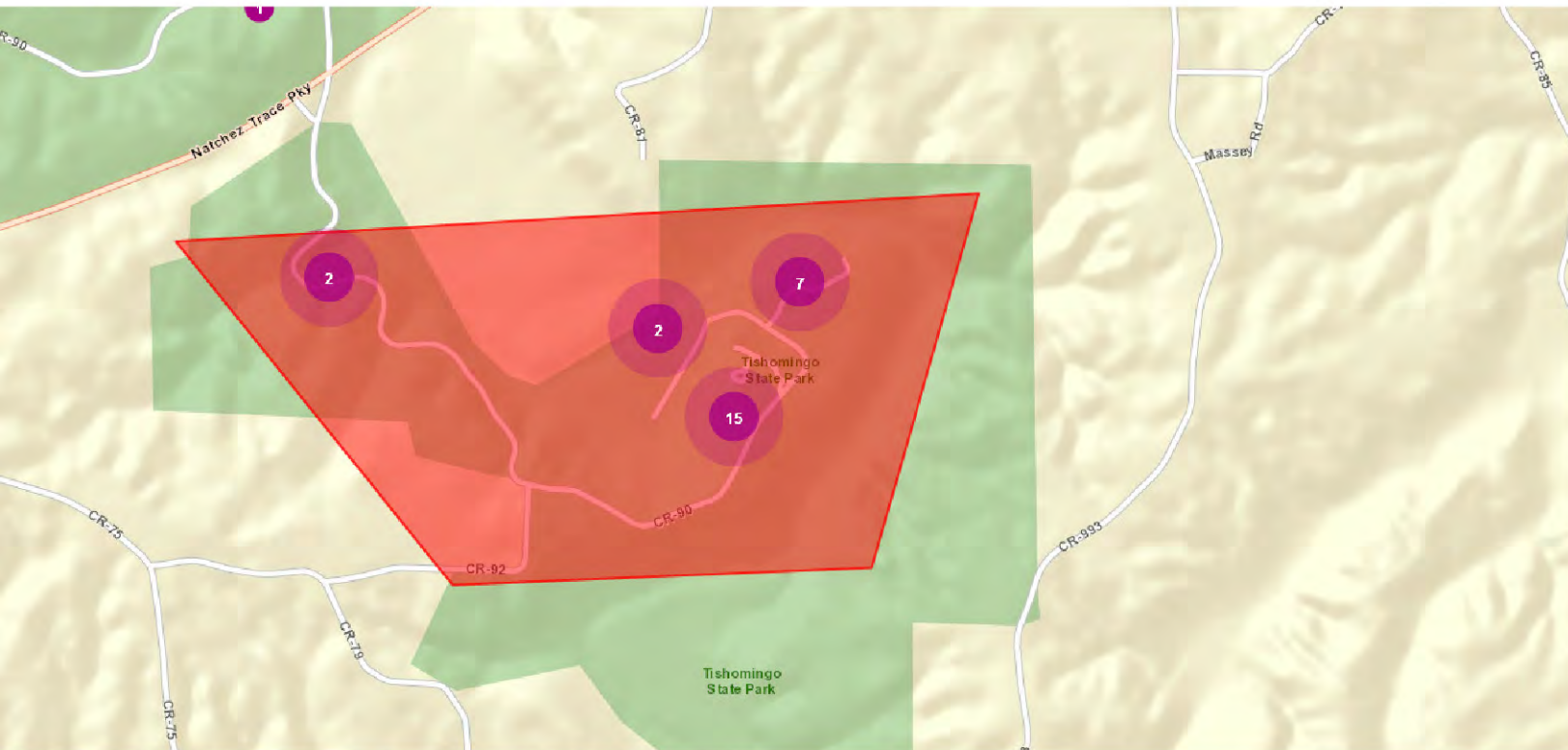
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National Register Listings (Excluding Archaeological)

NR Listings Found: 3

UNION COUNTY

INGOMAR MOUND [22-UN-500]	NEW ALBANY DOWNTOWN (DISTRICT)
----------------------------------	---------------------------------------

Listing Date: 09 Jun 1978	Listing Date: 01 Nov 1996
---------------------------	---------------------------

City: New Albany	City: New Albany
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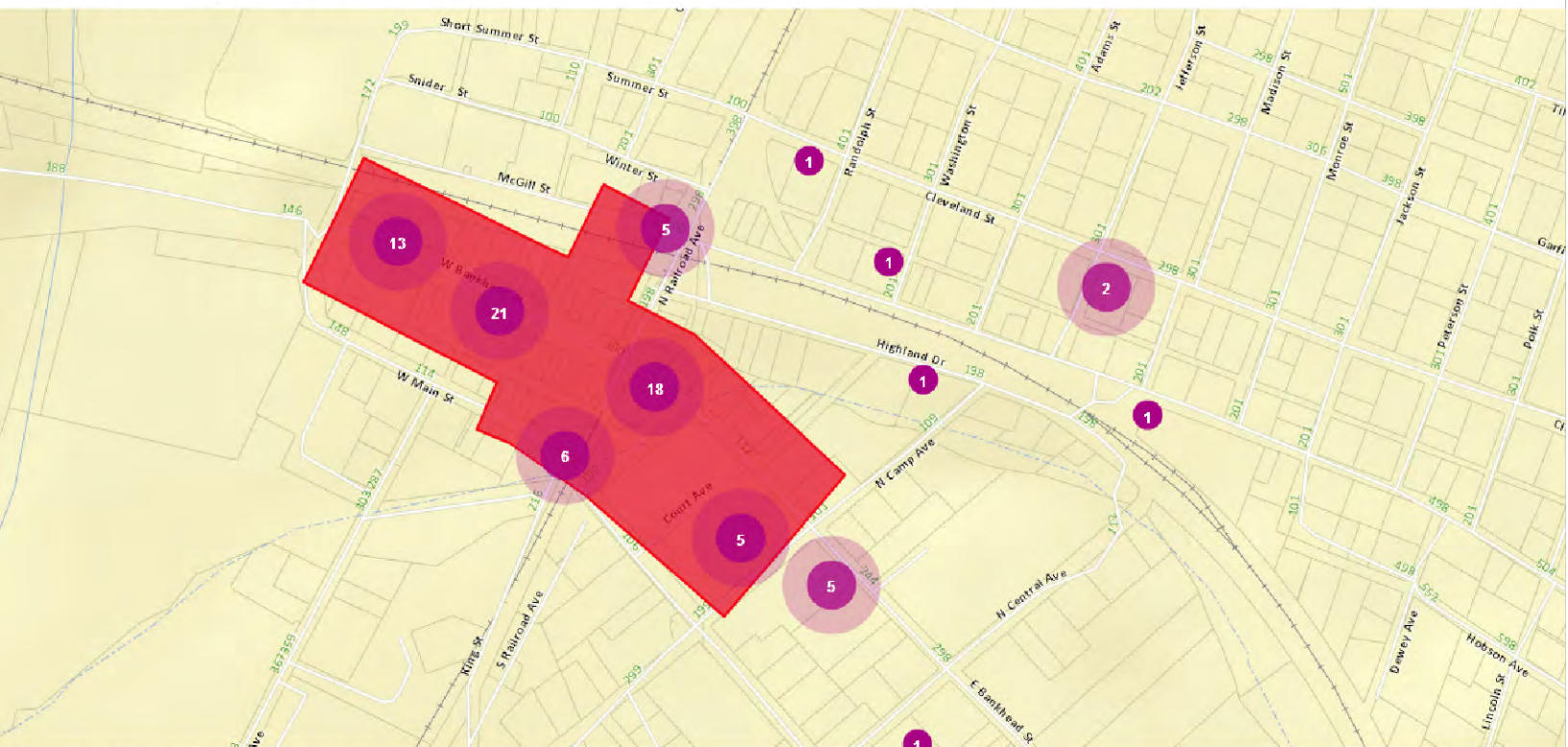
UNION COUNTY COURTHOUSE	
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Listing Date: 26 Jun 1990	
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City: New Albany	
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National Register Listings (Excluding Archaeological)

NR Listings Found: 2

WEBSTER COUNTY

EUPORA (DISTRICT)	WOOD COLLEGE (WOOD HOME FOR BOYS WOOD HALL)
Listing Date: 20 Jul 2011	Listing Date: 01 Apr 1984
City: Eupora	City: Mathiston

Note: A gray/blue background color denotes a non-extant property.

[Return to Home Page](#)

National Register Listings (Excluding Archaeological)

NR Listings Found: 9

WINSTON COUNTY

BAPTIST CHURCH OF CHRIST AT SARDIS

Listing Date: 21 Mar 2011

City: Louisville

BENJAMIN FRANKLIN SMYTH HOUSE

Listing Date: 25 Feb 1994

City: Louisville

DOWNTOWN LOUISVILLE (DISTRICT)

Listing Date: 20 Jul 2011

City: Louisville

FOSTER-FAIR HOUSE

Listing Date: 29 Nov 2000

City: Louisville

LEGION STATE PARK

Listing Date: 05 Nov 1998

City: Louisville

LEGION STATE PARK (DISTRICT)

Listing Date: 05 Nov 1998

City: Louisville

MASONIC HALL {LOUISVILLE LODGE NO. 75, F&AM}

Listing Date: 25 Feb 1994

City: Louisville

NANIH WAIYA MOUND AND VILLAGE SITE (22-WI-500)

Listing Date: 28 Mar 1973

City: Noxapater

OLD ROBINSON ROAD SEGMENT

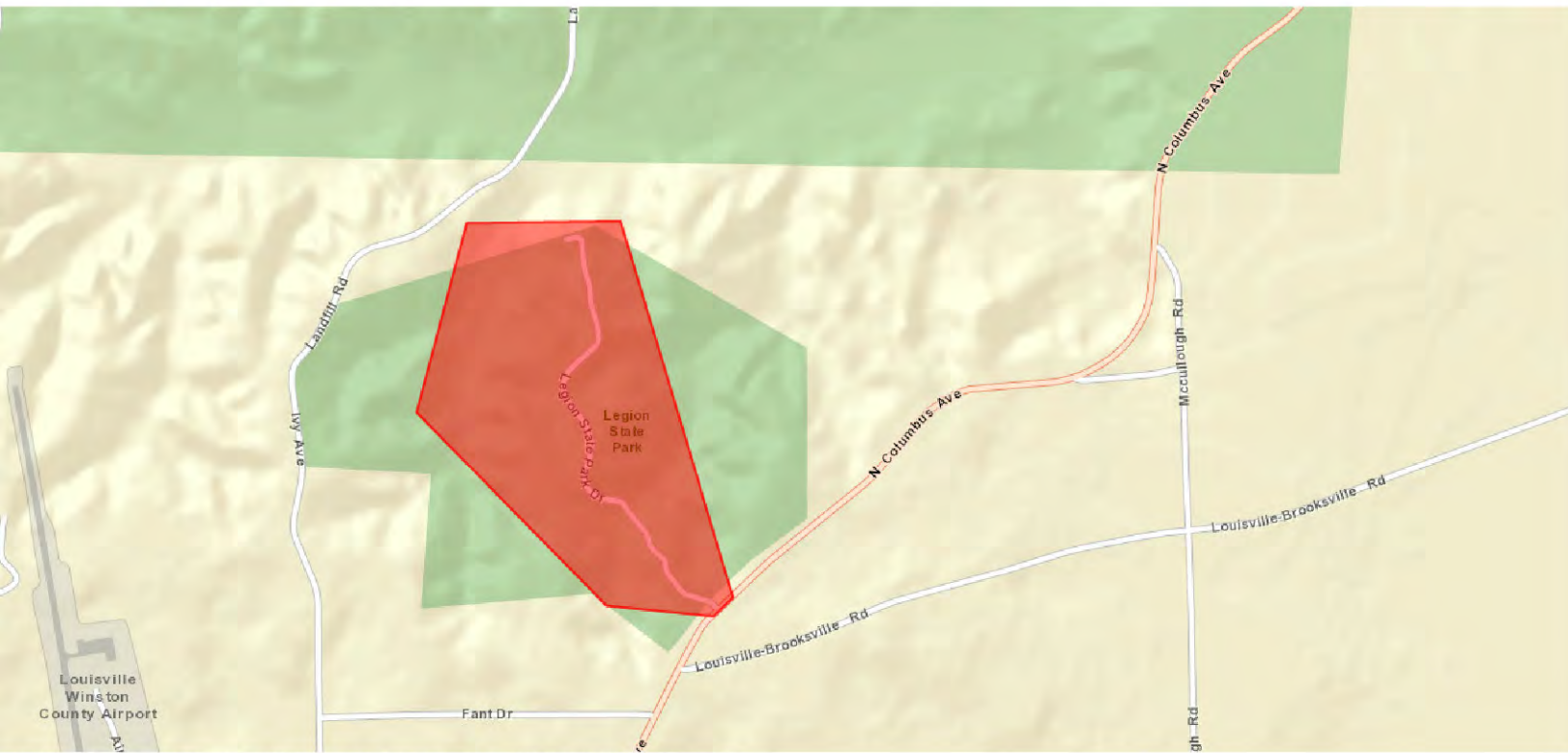
Listing Date: 03 Apr 1975

City: Louisville

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APPENDIX F

Economic & Market Assessment

Draft Preliminary

ECONOMIC & MARKET ASSESSMENT

Mississippi Hills National Heritage Area

Prepared August 12, 2012 (edited August 30, 2012)

By Randall Gross / Development Economics



DRAFT PRELIMINARY

DRAFT PRELIMINARY

INTRODUCTION

The Mississippi Hills National Heritage Area has been designated for all or portions of 30 counties in northeast Mississippi. This diverse region harbors a distinct sub-culture formed in the rolling hills and plains where Appalachia meets the Delta. These two physical features, the Appalachian mountain range and the Mississippi Delta, represent not only distinct geographical regions but also unique American cultures. It can be argued that the place where they meet spawned some of America's greatest cultural icons in their distinct forms of music, literature, and arts. The region also formed a crossroads for travelers along the Natchez Trace, which traverses the entire length of the heritage area, and for armies clashing in the Civil War.

This report provides an initial summary of findings from an economic and market assessment as input to the Management Plan for the Mississippi Hills National Heritage Area. This assessment includes a overview of economic conditions in the area, along with an inventory and review of tourism sites and services in the region. Tourism flow and trends were analyzed. Heritage tourism market potentials were then forecasted for the area as a basis for identifying opportunities for tourism development. A more detailed report will be produced to provide additional background information on the individual sites and attractions assessed as input to this analysis. Recommendations for implementation of projects and programs will also be provided in a later report.

Section 1 of this report provides an overview of the regional economic base and tourism flow. Section 2 summarizes the existing tourism asset base, with a focus on heritage tourism attractions. Section 3 provides findings from an assessment of market potentials for heritage tourism attractions. In Section 4, initial concepts for projects and programs are recommended as a starting point for further discussion.

DRAFT

DRAFT

Section 1. ECONOMIC & TOURISM SECTOR OVERVIEW

This section provides an overview of the regional economy and of tourism flow through the Mississippi Hills National Heritage Area (MHNHA). The heritage area comprises all or parts of 30 counties in north-east Mississippi, generally bounded by I-55 on the west, State Route 14 on the south, Alabama on the east and Tennessee on the north. The area includes some suburban portions of Memphis, but there are no other major cities within the 30-county region. That being said, there are several smaller cities that serve as economic hubs for the region, including Columbus, Tupelo, Holly Springs, Oxford, West Point, and Corinth. Columbus and West Point both form part of a Census-designated “micropolitan” area.

The economic history of the region has been influenced by the establishment of transportation routes, starting with Native American trails that were later used to form the Natchez Trace, an important western road in early America. The Natchez Trace Parkway is now headquartered in the MHNHA. The building of railroads spurred development of many of the region’s towns and cities, and was also key to control of the area during the Civil War. The Tennessee-Tombigbee Waterway has helped provide water transportation access to the Gulf of Mexico, yielding opportunities for industrial development in the region. The region’s geographic position where the foothills of the Appalachian Mountain range meet the Mississippi Delta has also played a role in its economic and cultural development.

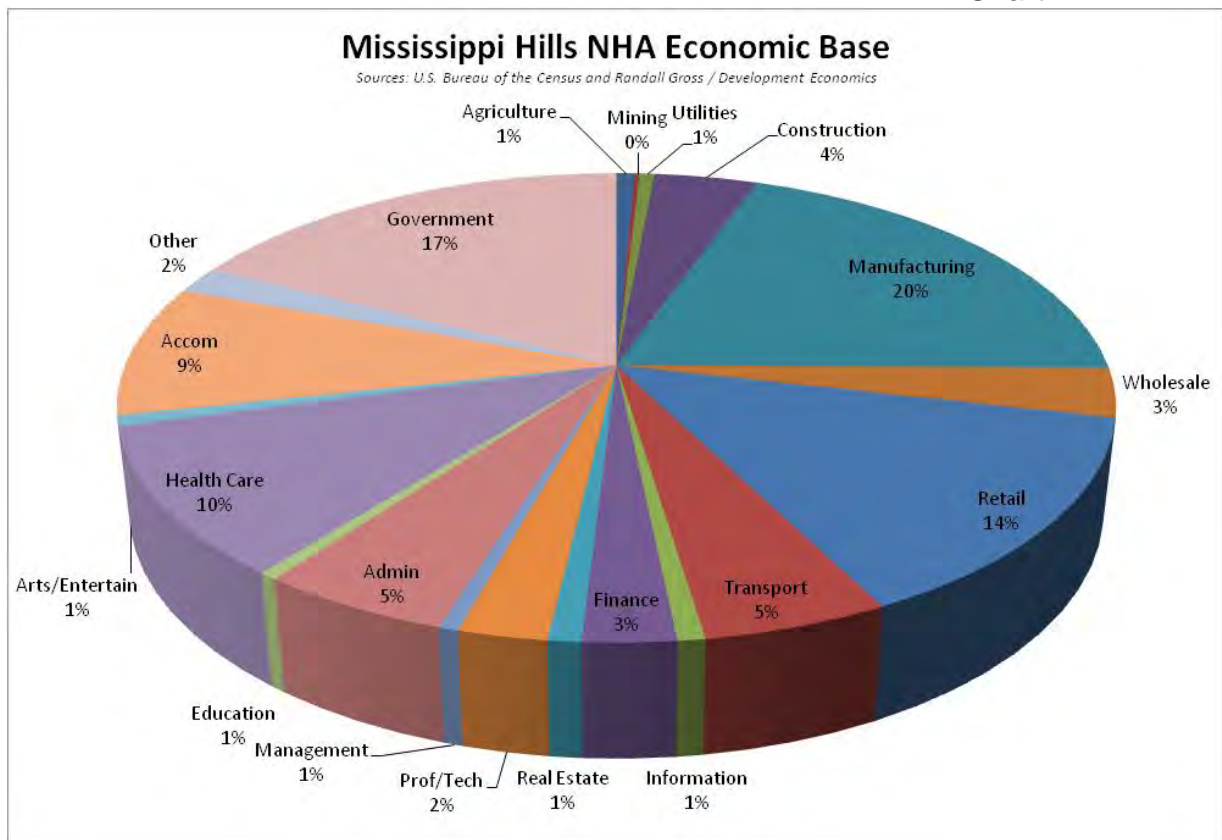
Key Economic Sectors and Trends

Based on data from the U.S. Census Bureau, manufacturing is the largest industry in the region, accounting for about 20% of all jobs in the MHNHA and almost 25% of private-sector employment. Many of these manufacturing jobs are concentrated in two counties, Lee and Pontotoc, with production focused in furniture, chemicals, machinery, auto parts and metal products. The MHNHA region is a leader in furniture manufacturing, with nearly 15,000 jobs in furniture production. In addition to Lee and Pontotoc, Union and Chickasaw counties are also major furniture production centers, although furniture manufacturing is found throughout the MHNHA. Tupelo hosts an annual Furniture Mart, attracting buyers from around the world twice per year in competition with major shows in Las Vegas and High Point. Chemical plants like Tronox and Georgia Gulf Chemicals & Vinyl in Monroe County employ hundreds throughout the region. Tiffin Motor Homes produces transportation equipment in Tishomingo County.

Other key sectors include retail trade, health care, and tourism. Hospitals are major employers throughout the region. The accommodation and foodservice

sector associated with the tourism industry accounts for more than 9.0% of all jobs and 11.0% of private-sector employment. Counties in the region with a relatively high share of accommodation sector jobs include Desoto, Lafayette, Oktibbeha, Granada, Attala, and Winston. Transport and administrative services are also important employers in the region, each with about 15,000 jobs. Agriculture only employs about 2,000 people, the same number as are employed in arts, entertainment and recreation. That being said, agriculture is important to the region's economy. Lumber and cotton still reign supreme in many areas and form an important part of the supply chain for manufactured goods like furniture. Vardaman is the "Sweet Potato Capital" of Mississippi and the town's fortunes are highly dependent on horticulture.

Chart 1



Several towns benefit economically from the presence of major public sector employers. Oxford is home to Ole Miss, Starkville to Mississippi State University, and Columbus to Columbus Air Force Base. Such large employers provide a relatively stable source of jobs and income for their communities and serve as anchors for other types of development. For example, Columbus has established an Aeronautic Park to attract industrial development. Some towns in the MHNHA are home to private corporate headquarters, such as Mossy Oak (West Point), Merry Maids (Olive Branch), Renasant Bank (Tupelo), and Hancock Fabrics (Baldwyn), which also serve to spin-off economic opportunities.

Employment Trends

The 30-county region covered by the Mississippi Hills National Heritage Area saw a decrease in the jobs base during the last ten years, according to the U.S. Bureau of the Census. At-place employment totaled approximately 233,260 in 2011, down 3.4% from 241,370 in 2001. The decrease in employment is partly a symptom of the recent recession. Recent trends suggest that growth has returned to some sectors in the region.

**Table 1. AT-PLACE EMPLOYMENT TRENDS BY
INDUSTRY SECTOR, MISSISSIPPI HILLS
NATIONAL HERITAGE AREA, 2001-2011**

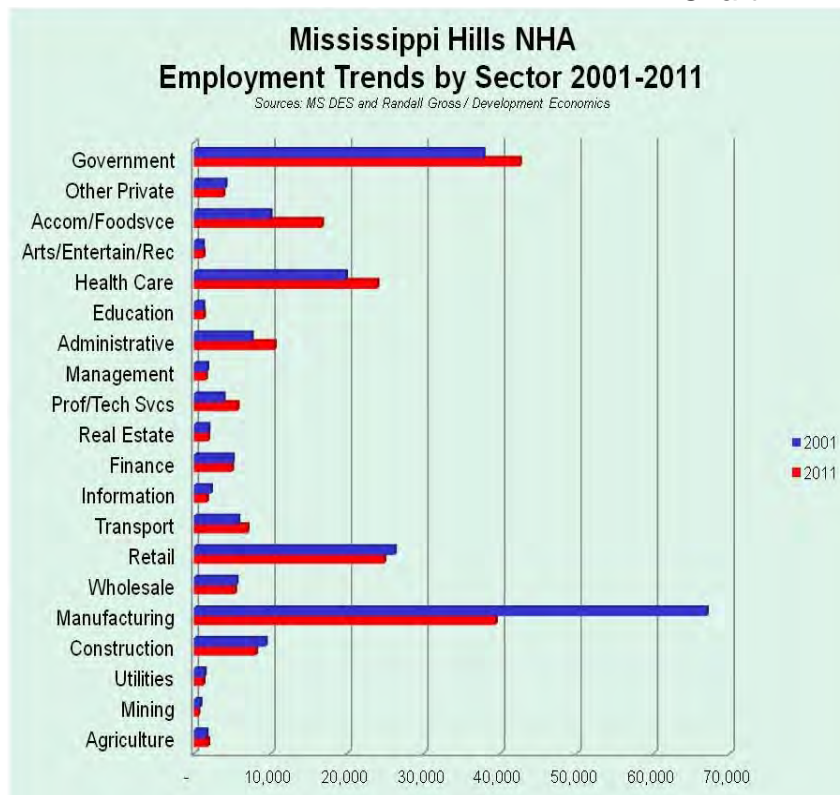
Industry	2001	2011	2001-2011 Change	
			Number	Percent
Agriculture	1,860	1,970	110	5.9%
Mining	800	560	(240)	-30.0%
Utilities	1,750	1,610	(140)	-8.0%
Construction	13,190	11,230	(1,960)	-14.9%
Manufacturing	89,790	55,870	(33,920)	-37.8%
Wholesale	8,240	9,510	1,270	15.4%
Retail	39,000	39,410	410	1.1%
Transport	10,430	14,460	4,030	38.6%
Information	2,690	2,120	(570)	-21.2%
Finance	7,140	7,230	90	1.3%
Real Estate	2,590	2,560	(30)	-1.2%
Prof/Tech Svcs	4,850	6,920	2,070	42.7%
Management	2,440	1,540	(900)	-36.9%
Administrative	9,700	14,950	5,250	54.1%
Education	1,210	1,430	220	18.2%
Health Care	22,490	29,000	6,510	28.9%
Arts/Entertain/Rec	1,700	1,990	290	17.1%
Accom/Foodsvce	15,980	25,700	9,720	60.8%
Other	5,520	5,200	(320)	-5.8%
TOTAL	241,370	233,260	(8,110)	-3.4%
<i>Government</i>	<i>43,460</i>	<i>49,430</i>	<i>5,970</i>	<i>13.7%</i>

Sources: Mississippi Department of Employment
Services and Randall Gross / Development
Economics.

Economic trends have been uneven within the region, with some counties experiencing rapid growth at the same time that others have experienced long-term decline. Lafayette County added 1,250 jobs over the ten-year period, for a growth rate of 11.2% (despite the period's inclusion of two economic recessions). Oktibbeha County added about 930 jobs (8.9%) during this same period. Similarly, Pontotoc County added 830 jobs (9.2%) and Panola County added about 810 jobs (11.4%). By far the largest and fastest growth has occurred in suburban Memphis' Desoto County, which added 10,450 jobs over the ten-year period, for a growth rate of 36.5%. Much of Desoto County's growth has been in transportation, accommodation, health care, retail, administrative services and wholesale trade. Manufacturing declined even in booming Desoto County. Most other counties in the region have seen declining employment, led by a rapid decrease in the manufacturing base. Clay County lost more than 50% of its employment base in just ten years, including the loss of 4,200 (out of 4,800) manufacturing jobs, according to U.S. Census (County Business Patterns) statistics. Similarly, Choctaw County lost nearly 50% of its employment base, including 1,430 of the county's 1,680 manufacturing jobs.

Economic Sectors. Overall, there has been a dramatic shift in the regional economic base in a relatively short time period as employment in certain sectors has declined rapidly at the same time that new jobs have been created in other sectors.

Chart 2



For example, the region lost nearly 34,000 manufacturing jobs since 2001, for a decrease of 37.8%. Large companies like Sarah Lee (which pulled out 500 production jobs from West Point) have retrenched due to foreign competition, economic recession, automation, financial collapse, or some combination of these factors. Despite this rapid decrease, manufacturing remains the largest economic sector in the region, as noted previously. Other sectors with declining employment in the region since 2001 included mining, construction, information services, real estate, management services and certain other services. Again, some of these sectors have begun to rebound in the last few years.

Other sectors, such as administrative services, have seen rapid growth since 2001, even during recession years. The MHNHA region's administrative services sector added nearly 5,300 jobs or 54.1% since 2001. Over 4,000 jobs were added in transportation, yielding a growth rate of 38.6%. Another 6,500 jobs (28.9%) were added in health care and 2,100 (42.7%) in professional & technical services. The region's other growth sectors have included arts & entertainment, education, government, finance & insurance, retail & wholesale trade, and (surprisingly), agriculture.

Tourism-Related Employment. Accommodation and foodservice represents the fastest-growing sector in the MHNHA region, adding almost 10,000 jobs for a growth rate of **60.8%** despite two national recessions. This growth in accommodation services, coupled with rapid growth in transportation, suggests a significant increase in tourism-related services at the same time that overall employment fell by 3.4%.

Importantly, while only a few counties in the MHNHA saw economic growth between 2001 and 2011, nearly ALL MHNHA counties saw growth in accommodation & foodservice employment during this same period. Thus, tourism growth has been important to the economic development of all portions of the region.

Growth in accommodation services has been fairly-well distributed throughout the region, although several counties like Lee, Desoto, Oktibbeha, and Lafayette have added exceptionally large numbers of tourism-related jobs over the past ten years.

Tourism Flow

The Mississippi Hills National Heritage Area (MHNHA) already has a well-developed tourism base, promoted by the MHNHA and the various county and local tourism agencies. If anything, the region has so many exceptional visitor attractions and experiences that it is difficult to characterize the region or package tours based on any one product or theme. Nevertheless, there are several key drivers that help generate or transmit tourism through the region. Several of these drivers are discussed below.

Key Drivers

There are several key “drivers” for tourism in the area, including long-distance highways, large cities, and major attractions. Several of these drivers are large regional venues located within or near the MHNHA, but there are also institutional drivers (such as the universities), meeting and convention spaces, key highways and various individual heritage sites that help drive the existing tourism market in the region. Several key market drivers are highlighted below.

Memphis and Graceland. Memphis is the largest city close to the MHNHA, and that city’s southern suburbs reach into the heritage area’s geographic region. The Memphis metropolitan area has a population of 1.3 million, including 161,000 in Desoto County, located within the MHNHA. Memphis is an important source of day-trippers as well as pass-through travelers in the MHNHA en route on U.S. Route 78 to/from Birmingham and Atlanta. More importantly, Memphis has become an important tourist hub because of its role in the evolution of American music, attracting millions of visitors from around the world to Elvis’ Graceland as well as to other major music heritage sites including the Stax (Records) Museum, Beale Street, and Sun Studio. Particularly relevant is the link for Elvis fans between Memphis and Tupelo, Presley’s birthplace. Busloads of tourists from far-flung reaches of the globe travel between Memphis and Tupelo, establishing a strong musical heritage tourism route. Obviously, the links between the MHNHA and Memphis extend further than Elvis, to touch on the Blues and other forms of music.

Natchez Trace Parkway. The Natchez Trace follows in the ancient path of migrating animals, Native American traders, and travelers including Andrew Jackson. Today, this linear national park attracts 5.9 million visitors per year, one of the most visited in the nation. Many visitors drive the entire length of the parkway from Natchez to Nashville, passing through a substantial portion of the MHNHA, which also serves as the Headquarters for the Trace. As a major heritage route, the parkway provides multiple opportunities for interface with the MHNHA. That being said, the parkway itself does not typically accommodate tourism services or non-park facilities.

Universities. The University of Mississippi main campus at Oxford forms an important driver for visitation to the region because of its role as a major state university but also as an historic campus and hub of literary heritage. Sites like Rowan Oak and the campus museums help establish an international draw, especially for literary tourism. Mississippi State University in Starkville has important heritage collections including Templeton, Grisham, Wade, and Dunn-Seiler. Historic Rust College in Holly Springs was founded in 1866 by the Freedman’s Aid Society. Today the school retains control of the historic former Mississippi Industrial College buildings, located nearby.

Interstate 55. The region also benefits from north-south access provided by Interstate 55, which links Chicago to Memphis and New Orleans. There is a traditional flow of “Snowbirds” and retirees from the Midwest who travel south for winter sunshine in the south. Other travelers along I-55 are visiting family and friends, or are traveling for business and pleasure during holidays. I-55 is also the primary route for beachgoers headed to the Gulf Shore from the Midwest, Memphis, and other places. I-55 carries average daily traffic (ADT) counts of nearly 70,000 near Memphis at the Tennessee State Line in Southaven, falling to about 20,000 in Batesville and as low as 12,000 near Vaiden.

National and State Parks. Located just north of the MHNHA is Shiloh National Battlefield, which attracts thousands of visitors to the region, many of whom visit other Civil War heritage sites in Corinth and other parts of the MHNHA. Mississippi State Parks including Tishomingo, J.P. Coleman, and others help bring people from other parts of Mississippi and surrounding states into the study area, thus creating a market for heritage and other tourism sites.

Meeting & Convention Centers. There are several meeting and convention centers located in the MHNHA that also bring people to the region as a market base for heritage tourism. Among these centers are BancCorp South Arena & Convention Center (Tupelo), Crossroads Arena & Convention Center (Corinth), Trotter Convention Center (Columbus), Oxford Conference Center, and others.

Other Drivers. Other tourism drivers include the variety of individual heritage sites and historic districts, including Elvis’ Birthplace, Howlin’ Wolf Museum, Brice’s Crossroads, Corinth National Battlefield, Ida B. Wells Home, Waverly Plantation, Tupelo Elvis Festival, and the many historic homes and business districts throughout the MHNHA. Each of these helps attract visitors to the region. For example, many towns in the region sponsor an annual Pilgrimage which brings thousands to the region in spring time for historic home tours.

Overall Tourism Visitor Trends

The number of tourists within the Mississippi Hills National Heritage Area has been estimated based on data from the Mississippi Development Authority’s Tourism Division at about 3.6 million (2011). This number is down by about 703,000 or 16.3% from 2004 (due to recession), but is up from 2010 by 8.6%.

Based on State data, it is estimated that the largest number of tourists is in Desoto County (830,000 per year), although suburban Memphis sees a number of regular visitors from other parts of the Memphis region. Outside of suburban Memphis, Lee, Lowndes, and Lafayette counties generate the largest number of visitors. These three counties also happen to be home to the largest cities in the MHNHA.

Lee County attracts an estimated 809,000 visitors per year, based on State Tourism data. Tupelo, the county seat, is not only one of the larger cities in the region, it is also Elvis's home town and as such, attracts international tour bus operators and throngs of individual visitors. Lee County's tourism numbers fell from nearly 1.2 million in 2004 to just 750,000 in 2010, before increasing again to about 810,000 in 2011. Even with a 30% decrease in visitor base, Lee County has remained the top tourism hub in the region outside of the Memphis area.

In 2011 about 320,000 tourists visited Lafayette County, home to Oxford and the University of Mississippi. Lafayette County is also exceptional due to the fact that it was one of only a handful of MHNHA counties that have seen consistent tourism growth even during the recession. The estimated number of tourists visiting Lafayette County increased by 14% (or nearly 40,000) since 2004. The presence of a large state university plays a role in stabilizing the economy and generating a steady stream of visitors. Lowndes County, with about 340,000 tourists in 2011, is home to Columbus, an important economic hub for the MHNHA region, home to Columbus Air Force Base and Mississippi University for Women. Tourism in Lowndes County fell by more than 30% between 2004 and 2011 (based on the estimated number of visitors), but increased by almost 11% since 2010.

Other counties attracting more than 100,000 visitors per year, based on State tourism estimates, include Oktibbeha (260,000), Alcorn (165,000), Grenada (139,000), and Panola (120,000). Based on the state tourism data, Benton County had the smallest tourism base, attracting only 2,800 visitors in 2011. Carroll, Chactaw, and Webster counties also attracted less than 10,000 visitors that year.

Several counties have seen consistent tourism growth even during the recession, including Lafayette (Oxford), Prentiss (Booneville), Tishomingo (Iuka), Union (New Albany), and Yalobusha (Water Valley). Yalobusha County experienced nearly 40% growth in tourists between 2004 and 2011, even as the region saw a decrease of 16%. Most counties have seen an increase in tourism since the recession, with Union County experiencing 30% growth in 2010 alone. These trends are summarized in the table below.

Table 2. TOURISM VISITOR TRENDS, MISSISSIPPI HILLS NATIONAL					
HERITAGE AREA COUNTIES, , 2004-2011					
County	2004	2010	2011	2004-2011 Change	2010-2011 Change
Alcorn	201,800	145,593	164,700	-18.4%	13.1%
Attala	83,400	56,862	58,900	-29.4%	3.6%
Benton	3,500	2,651	2,800	-20.0%	5.6%
Calhoun	12,200	10,994	10,700	-12.3%	-2.7%
Carroll	5,600	3,617	3,900	-30.4%	7.8%
Chickasaw	35,100	17,539	17,800	-49.3%	1.5%
Choctaw	5,200	3,749	3,800	-26.9%	1.4%
Clay	67,200	51,798	53,300	-20.7%	2.9%
Desoto	869,500	767,664	830,400	-4.5%	8.2%
Granada	183,200	131,211	139,400	-23.9%	6.2%
Holmes	21,800	13,601	13,600	-37.6%	0.0%
Itawamba	43,300	32,242	35,900	-17.1%	11.3%
Lafayette	281,700	303,939	321,100	14.0%	5.6%
Lee	1,156,100	751,860	808,700	-30.0%	7.6%
Lowndes	502,100	310,713	344,000	-31.5%	10.7%
Marshall	44,300	41,109	42,100	-5.0%	2.4%
Monroe	90,700	54,027	57,000	-37.2%	5.5%
Montgomery	36,700	23,493	29,900	-18.5%	27.3%
Noxubee	18,800	16,694	16,000	-14.9%	-4.2%
Oktibbeha	275,500	231,270	261,000	-5.3%	12.9%
Panola	85,900	106,996	119,700	39.3%	11.9%
Pontotoc	32,800	27,276	28,500	-13.1%	4.5%
Prentiss	25,500	23,886	27,600	8.2%	15.5%
Tate	46,200	31,640	35,200	-23.8%	11.3%
Tippah	27,700	22,370	23,100	-16.6%	3.3%
Tishomingo	35,300	37,339	43,000	21.8%	15.2%
Union	47,300	42,289	55,100	16.5%	30.3%
Webster	8,900	7,897	8,500	-4.5%	7.6%
Winston	67,600	49,993	52,200	-22.8%	4.4%
Yalobusha	9,300	12,442	12,900	38.7%	3.7%
TOTAL	4,324,200	3,332,754	3,620,800	-16.3%	8.6%
Sources:	Mississippi Development Authority, Tourism Division; and Randall Gross / Development Economics.				

Tourism Expenditures

Tourism expenditures were estimated at about \$1.04 billion in 2011, up by \$180.2 million or 21% from 2004. Tourism expenditures increased even though the number of tourists fell because tourists spent more in 2011. In 2004, the average spend was about \$199 per visitor. By 2011, spending had increased to about \$287 per visitor.

Spending increased in most counties in the MHNHA between 2004 and 2011, but the fastest increases were in Panola and Yalobusha counties, where total spending more than doubled during the seven-year period. Tishomingo, Union and Lafayette counties also saw exceptionally rapid increases in total tourism spending during that period, followed by Prentiss, Webster, Oktibbeha, Marshall, and Desoto. Desoto saw the largest growth amount, nearly \$66 million in tourism spending, over the seven-year period. Chickasaw, Holmes, Lowndes, and Monroe experienced a decrease in tourism spending during the period. A detailed summary of trends in tourism spending by individual counties within the Mississippi Hills National Heritage Area is provided in the following table, based again on data supplied by the Mississippi Development Authority's Tourism Division.

Table 3. TOURISM SPENDING TRENDS, MISSISSIPPI HILLS NATIONAL				
HERITAGE AREA COUNTIES, , 2004-2011				
County	2004	2011	2004-2011 Change	
			Amount	Percent
Alcorn	\$ 40,098,811	\$ 47,262,467	\$ 7,163,656	17.9%
Attala	\$ 16,562,757	\$ 16,908,543	\$ 345,786	2.1%
Benton	\$ 691,729	\$ 803,812	\$ 112,083	16.2%
Calhoun	\$ 2,430,048	\$ 3,061,985	\$ 631,937	26.0%
Carroll	\$ 1,106,965	\$ 1,117,642	\$ 10,677	1.0%
Chickasaw	\$ 6,965,838	\$ 5,096,171	\$ (1,869,667)	-26.8%
Choctaw	\$ 1,042,503	\$ 1,089,890	\$ 47,387	4.5%
Clay	\$ 13,342,567	\$ 15,311,757	\$ 1,969,190	14.8%
Desoto	\$ 172,762,905	\$ 238,326,617	\$ 65,563,712	38.0%
Granada	\$ 36,409,842	\$ 40,020,044	\$ 3,610,202	9.9%
Holmes	\$ 4,341,252	\$ 3,908,771	\$ (432,481)	-10.0%
Itawamba	\$ 8,608,328	\$ 10,313,733	\$ 1,705,405	19.8%
Lafayette	\$ 55,965,132	\$ 92,174,391	\$ 36,209,259	64.7%
Lee	\$ 229,705,613	\$ 232,124,655	\$ 2,419,042	1.1%
Lowndes	\$ 99,763,819	\$ 98,738,459	\$ (1,025,360)	-1.0%
Marshall	\$ 8,802,554	\$ 12,092,686	\$ 3,290,132	37.4%
Monroe	\$ 18,021,375	\$ 16,367,355	\$ (1,654,020)	-9.2%
Montgomery	\$ 7,293,719	\$ 8,590,611	\$ 1,296,892	17.8%
Noxubee	\$ 3,740,631	\$ 4,606,539	\$ 865,908	23.1%
Oktibbeha	\$ 54,734,153	\$ 74,911,249	\$ 20,177,096	36.9%
Panola	\$ 17,066,820	\$ 34,341,965	\$ 17,275,145	101.2%
Pontotoc	\$ 6,516,846	\$ 8,190,247	\$ 1,673,401	25.7%
Prentiss	\$ 5,063,599	\$ 7,907,909	\$ 2,844,310	56.2%
Tate	\$ 9,171,504	\$ 10,104,699	\$ 933,195	10.2%
Tippah	\$ 5,504,059	\$ 6,644,086	\$ 1,140,027	20.7%
Tishomingo	\$ 7,020,728	\$ 12,352,248	\$ 5,331,520	75.9%
Union	\$ 9,392,909	\$ 15,820,302	\$ 6,427,393	68.4%
Webster	\$ 1,768,403	\$ 2,448,705	\$ 680,302	38.5%
Winston	\$ 13,437,369	\$ 14,993,971	\$ 1,556,602	11.6%
Yalobusha	\$ 1,840,197	\$ 3,693,162	\$ 1,852,965	100.7%
TOTAL	\$ 859,172,975	\$ 1,039,324,671	\$ 180,151,696	21.0%
Sources:	Mississippi Development Authority, Tourism Division; and Randall Gross / Development Economics.			

Summary

The Mississippi Hills National Heritage Area (MHNHA) is comprised of 30 counties in north-east Mississippi. Memphis is the largest city adjacent to the heritage area and its sprawling suburbs reach into two MHNHA counties. Other important economic and population hubs include the Columbus-Starkville area, Tupelo, Oxford, and Corinth, among others. Ole Miss and other universities are important anchors for the region, not only in terms of the education and amenity value they provide but also as repositories for cultural heritage. This region has built an economy based in manufacturing and while industrial employment has fallen sharply in the last decade, manufacturing remains the main employer in the region. Access to the Tennessee-Tombigbee Waterway continues to play an important role in retaining this manufacturing base over the long-term. While many industries falter, the tourism industry has grown throughout the region. Accommodation, foodservice, and transportation growth has exceeded that of most other industries, and the tourism employment base is spread more evenly throughout the 30-county area. Key drivers inside and outside of the MHNHA help generate increasing tourism expenditures. Despite a temporary setback due to recession, the industry continues to attract more than 3.6 million people per year to the area, many of whom are experiencing the region's rich cultural, natural, and economic heritage.

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Section 2. HERITAGE TOURISM ASSET BASE

This section summarizes findings from an inventory and assessment of the region's tourism asset base, with a particular focus on heritage tourism. The inventory and analysis were conducted based on extensive field reconnaissance (to as many sites as possible), interviews with operators and managers, and other research. This inventory includes over 1,000 tourist attractions, museums, parks and natural assets, towns and districts, festivals, sports and recreation facilities, trails and tours, lodging facilities, unique stores, tourism organizations, and related activities. These activities are summarized by type, then by theme, below. A more detailed analysis of the activities is then provided for heritage-related festivals, museums, natural areas, and historical sites & parks. This analysis includes a discussion of attendance and other factors, while a more detailed assessment of individual sites will be provided in a follow up report.

Tourism Activities and Assets by Type

The tourism assets are organized by general type or function and also by theme. Each of these types and themes is discussed below, to provide an indication of the general scale and location of the asset base.

Types and Locations of Assets

The Mississippi Hills National Heritage Area (MHNHA) has a wide variety of tourism assets, well-distributed throughout the 30-county region. These assets and activities are summarized below.

Festivals and Events. Perhaps the largest number and most broadly-distributed of these assets are events and festivals. There are literally hundreds of events and festivals in the region, widely distributed to every county and most towns of any size. Many communities (large and small) have 4th of July and Christmas events. Quite a number also have annual Pilgrimages for residents and visitors to gain entry to the region's magnificent historic homes from the antebellum era through Victorian and modern times. Larger cities like Columbus and Tupelo may have as many as 8,000 to visit their historic homes each year during Pilgrimage. Smaller towns in-between, like Aberdeen, accommodate several busloads of visitors each year for their Pilgrimage events.

But there are also unique festivals and events like Pioneer Days (French Camp), Howlin Wolf Blues Festival (West Point), Elvis Festival (Tupelo), Ragtime Music Festival (Starkville), Tennessee Williams Festival (Columbus), Hummingbird Migration and Nature Festival (Holly Springs), and Southern Literary Festival (Blue Mountain). There is also a growing number of sporting

events like pro fishing tournaments, golf tournaments, 10k runs, and softball and other amateur athletic tournaments. Disc Golf has become popular in the region and Tishomingo State Park has developed several major disc golf courses and attracts hundreds to its tournaments. Again, these events are spread throughout the region, with some concentration in the larger population centers.

Museums. There are nearly 50 museums inventoried for this analysis. The broad range of museums covers music, literature, transportation, local history & events, science, art, and various specialties. While many museums are found in the larger cities, a number of smaller towns have museums. The region's universities, including Mississippi State, Ole Miss, Rust College, and others are important repositories of art, literature and historical artifacts. Several universities have their collections displayed in museum facilities, although much of the universities' collections are housed in internal buildings with limited public exposure.

Parks, Forests and Natural Areas. There are at least 40 national and state parks, wildlife areas, and recreation areas in the MHNHA, plus untold numbers of local municipal and county parks and open space facilities. These parks, nature reserves, forests, and recreation areas are distributed throughout the region. The Natchez Trace Parkway is perhaps the best known and most visited of the national facilities, but a sample of others includes Grenada Waterfowl Refuge, Tombigbee National Forest, Chickasaw Wildlife Management Area, Hugh White State Park, Hillside National Wildlife Refuge, Holly Springs National Forest, Columbus Lake (which accommodates four fishing tournaments per season), Noxubee National Wildlife Refuge, John W Kyle State Park, J.P. Coleman State Park, Crows Neck Environmental Education Center, Hell Creek Wildlife Management Area, and George Payne Cosser State Park, among others. In addition to these natural areas is the Tenn-Tom Waterway, which (like Natchez Trace) forms a linear corridor linking many parts of the heritage area.

Downtowns & Historic Districts. The MHNHA is home to at least 90 downtowns and historic districts. Each large and small town center offers an opportunity to interpret the unique history and culture of the area. In addition to large downtowns in Tupelo, Columbus, Starkville, Corinth, and Oxford, there are quaint visitor-oriented town centers (like Olive Branch's Old Towne) and other communities offering interest to the heritage tourist. Many of these downtowns are homes to unique retail and other businesses. At least 50 such "unique" retail businesses have been inventoried, ranging from Square Books in Oxford to Tupelo Hardware (where Elvis's mother purportedly purchased his first guitar), to Annie's Soul Food in Holly Springs. There are also at least 15 historic theatres and other venues in the area, some of which are restored and operating successfully as both film and live event venues, while others are awaiting funding for restoration. The larger cities like Columbus, Tupelo, and Oxford also offer significant historic districts with dozens of homes listed on the National Register.

Lodging and Meeting Venues. The MHNHA offers a variety of tourism services and accommodation, including 303 lodging facilities and at least six conference and convention venues in the inventory. Many of the lodging facilities are clustered along highways including US Route 78, US 45/Alt 45, US 278/MS6, and US 72. Suburban Desoto County has a large number of lodging facilities (nearly 60) associated with the broader Memphis regional market. However, Lowndes, Lee, Oktibbeha and several other counties also have significant numbers of lodging facilities. Some areas, like Carroll County, have relatively few lodging options. Major meeting facilities include BanCorp South, Crossroads, Trotter, and Oxford Conference Center, among others.

Historic Sites. There are nearly 100 historic sites inventoried as part of this assessment. These sites range from the Tennessee Williams Home (Columbus) to Civil War sites and ancient Indian mounds. Most sites are already marketed to tourists and well-attended. The historic sites are generally clustered around themes focused on renowned southern literary figures and musicians, the Civil War, historic homes, agriculture, civil rights, and Native American heritage. However, the region's Native American heritage seems relatively under-researched, under-interpreted, and under-developed for tourism. There are also several interesting historical events such as the Yellow Fever Epidemic interpreted at several heritage sites in the region.

Trails and Tours. The region has several trails and driving tour routes and offers guided walking tour services. Among the routes inventoried for this analysis are the Mississippi Blues Trail (which extends from the Delta into the MHNHA to interpret the region's "Hill Country Blues") and the Tanglefoot Trail (44.5-mile bike trail along a former rail line). A number of bus tours extend from Memphis and/or New Orleans to capture the Elvis Birthplace in Tupelo. MHNHA has itself developed itineraries for travel throughout the region, arranged by theme as discussed below.

Key Heritage Themes

The Mississippi Hills National Heritage Area has been given a broad thematic focus that forms the basis for tourism marketing in the region. The themes touch on iconic southern artists (writers and musicians), Native American heritage, architecture (historic homes), the Civil War, and African-American heritage (focused on the Civil Rights Movement). These themes are generally captured by the itineraries that have already been developed by the MHNHA, with the addition of outdoor recreation (which is complementary to, but not the focus of, heritage tourism) and educational heritage. These itineraries include the following:

- American Cultural Icons (literature, music)
- The March to Freedom (civil rights heritage)
- Crossroads of the Confederacy (Civil War)

- Southern Architecture
- Outdoor Recreation
- Educational Heritage

Examples of attractions and sites that exemplify each of these themes and itineraries are summarized below.

Music & Literature

The MHNHA has a unique place in the history of American music. Due in part to its location at the crossroads of Appalachia and the Delta, this region gave birth to a blending of musical genres ranging from dulcimer-driven mountain music to Hill Country Blues. The amalgam of musical styles was perhaps best captured by the King of Rock 'n Roll, Elvis Presley, born in Tupelo. The Elvis Birthplace and Museum thoughtfully acknowledges the various influences on Elvis's music, including gospel, country and Delta blues. In addition to Elvis, the region gave birth to such iconic music figures as country music queen Tammy Wynette and famed blues singer Howlin' Wolf. Out of this mix of music and genres, one could claim that Rock n Roll itself was born in the Mississippi Hills.

The region is equally unique in American culture as the home of so many iconic writers and literary figures, with an exceptional impact on southern writing. William Faulkner was not only born in the region (New Albany), he established his home at Oxford and provided some of America's greatest literature from this humble dwelling. Tennessee Williams, one of the country's greatest playwrights, was born and lived his early years in Columbus. One of America's most recognized present-day writers, John Grisham, has presented personal papers and other materials to his alma mater, Mississippi State University in Starkville.

Music- and literary-related sites and activities in the MHNHA include the following, among others:

- Rowan Oak, Home of William Faulkner
- Elvis Presley Birthplace & Museum
- Tennessee Williams Festival
- Tupelo Hardware (Elvis' first guitar)
- Elvis Presley Tour
- Tupelo Elvis Fest
- St. Peter's Cemetery (Faulkner family)
- Ole Miss - J.D. Williams Library (46,000 rare books & manuscripts)
 - Faulkner Room and collections of Barry Hanna, Larry Brown, Ellen Douglas, Beth Henley, Ace Atkins and other literary figures
 - Blues Collections (music, posters, personal effects some of which temporarily displayed in Faulkner Room but otherwise having no permanent exhibition space).
 - Reading Room, Hallway used for research and exhibitions

- Center for the Study of Southern Culture
- Faulkner and Yoknapatawpha Conference
- Music of the South Symposium
- Oxford Conference of the Book
- Tennessee Williams Home & Welcome Center
- St. Paul's Episcopal Church (Williams' baptism)
- Oprah Winfrey Road (church where she first sang, home site)
- Mississippi University for Women (Eudora Welty alma mater) Galleries
- Mississippi State University
 - John Grisham Room
 - Charles H. Templeton, Sr. Ragtime Music Museum
 - President Grant papers (de facto Presidential Library)
- Ragtime Music Festival
- Faulkner Literary Garden (Union County Heritage Museum)
- Bryan Reading Park (busts of literary figures) at West Point Library
- Bobbie Gentry (rock) hometown
- Southern Literary Festival (Blue Mountain College)
- Tishomingo County Dulcimers
- Casey Jones Railroad Museum
- White Station Juke Joints (Wolf Birthplace)
- Walter Sharkey Horton (blues) hometown
- Jimmy Rogers (country) hometown
- Jimmy Lunceford hometown
- Mainstreet Vintage Guitars (Tupelo)
- Tammy Wynette (country) hometown
- Elvis & Priscilla Honeymoon Cottage
- Memphis Minnie (blues) gravesite
- Jerry Lee Lewis (rock n roll, country) current home (Nesbit)
- Square Book bookstore (Oxford)
- Howlin' Wolf Blues Museum
- Holly Springs' Hill Country Blues
- Howlin' Wolf Memorial Blues Festival
- Old Country Jamboree / Opry Family Theatre (Amory)
- Bukka White Blues Festival (Aberdeen)
- Sandyland Road Juke Joint (Noxubee County)

Other key points of interest in the arts include the home of recently-deceased "yard artist" L. V. Hull (Kosciusko), the Old Miss Art Galleries (4,000 pieces and the Southern Folk Art Collection), the Gumtree Museum of Art, the Rosensweig Art Center, the Donald Trousdale African Art Collection, and others.

Native American Heritage

MHNHA lies at the heart of the Chickasaw nation homeland. Place names throughout the region, especially north of U.S. Highway 82, testify to the heritage

of the Chickasaw people: Pontotoc ("Land of Hanging Grapes"), Itawamba ("Bench Chief"-Levi Colbert), Tishomingo (or Tisho Minko, "Assistant Chief," the last great Chickasaw Chief), Okolona ("peaceful" or "blue water"), and others. South of what is now U.S. 82, the Choctaw predominated long before Europeans entered the region. Tombigbee is a Choctaw word meaning "Coffin Maker" and Noxubee means "stink." The Chickasaw and Choctaw shared a close history and culture. Their languages are similar and names like Yalobusha, meaning "Tadpole Place," are found in both cultures. Both Chickasaw and Choctaw nations were forcibly removed to Oklahoma along the Trail of Tears. Sample Native American related sites in the MHNHA include the following (with some mound information supplied by the National Park Service):

- Nanih Waiya (Middle Woodland period mound in Winston County highly sacred to the Choctaw and listed on the National Register of Historic Places. The date of the site's return became a Choctaw Nation holiday)
- The Brogan Mound (Clay County)
- Site of Chickasaw National Council House (Pontotoc)
- Site of Allen's Tavern ("town hall" of Chickasaw villages, Pontotoc)
- Topulkah's (Chief's House, Cate's Place, Pontotoc)
- Bynum Mound and Village Site (six Middle Woodland period mounds, 28 miles southwest of Tupelo, one of the largest MW ceremonial sites in southeast)
- Pontotoc City Cemetery (burial of Chickasaw and whites)
- Betty Love Allen (Chickasaw daughter's situation resulted in first law in world allowing women to own property not liable for debts of husbands)
- Bear Creek Mound and Village Site (Mississippian period site, 45 miles northeast of Tupelo)
- Thelma Mound Archeological Site (Houston)
- Pharr Mounds (eight Middle Woodland mounds, 23 miles northeast of Tupelo)
- Owl Creek Site (Five Mississippian period platform mounds, 18 miles southwest of Tupelo)
- Walls Indian Mounds (operated by Desoto County Museum)
- Natchez Trace Parkway (interprets Native American trail history)
- Oren Dunn Tupelo City Museum (has pre-history exhibits)
- American Indian Artifacts Museum (Columbus)
- Statues of Chief Tishomingo, at/near Tishomingo State Park
- Tishomingo County Historical Museum (Chickasaw exhibit)
- Chief Tishomingo Home Site (near Baldwin)

African American / Civil Rights

Among the most enduring images of the struggle for African-American civil rights are the heroic steps taken by James Meredith to enroll in the University of Mississippi. What started as a personal journey became a flashpoint in American

history, memorialized in images of the young man entering the university under armed guard among rioting demonstrators. While such images paint a raw picture of northeast Mississippi during the civil rights era, they also provide a reference point for the tremendous and hard-fought progress that has occurred in the region since that time. Only recently another man of color entered the halls of Old Miss to national attention for a great debate and went on to become President of the United States. Some of the region's sites and activities associated with the struggle and achievement of equality include:

- Black History Museum of Corinth
- Corinth Contraband Camp
- Rust College
 - Donald Trousdale African Art Collection
 - Mississippi Industrial College Campus
 - Roy Wilkins Collection
- Ida B Wells Barnett Museum and IBW Week
- Historic Colored School (Burnsville)
- Oprah Winfrey, Howlin' Wolf and other trailblazers
- Saints Academy (slave history of plantation, Lexington)
- University of Mississippi
 - The Lyceum
 - Civil Rights Monument and James Meredith Statue
 - Center for the Study of Southern Culture
 - Blues Music Collections
- Columbus-area African-American churches and homes
- MLK Dream 365 event
- James Meredith hometown Kosciusko

Civil War

The Civil War presents an important component of heritage tourism marketing for the region, even though northeast Mississippi did not see the major battles of the war. Located not far from the area is Shiloh National Military Park, one of the major Civil War historical sites and a key driver for heritage tourism throughout the broader region, attracting about 70,000 visitors per year. Located just over the state line in Pittsburg Landing, Tennessee, Shiloh is easily accessible via Routes 57/25 and U.S. 45 from the MHNHA.

Various places in the region saw skirmishes, if not battles, during the Civil War. Corinth, Tupelo, and Brice's Cross Roads were among the more important conflicts in the region. But Civil War history permeates much of the heritage in northeast Mississippi, where contraband camps, railway bridges, and other flotsam and jetsam of war left their mark on the landscape and culture of the region. Key sites include:

- Walter Place Estate (General Grant's Holly Springs home)

- Ole Miss Civil War Collections (Library) and Ventress Hall
- Van Dorn Raid Driving Tour
- Hill Crest Cemetery (Holly Springs), Confederate Cemetery (Oxford), Shady Grove Cemetery (Iuka), Corinth National Cemetery, Friendship Cemetery (Columbus)
- Battle of West Point (Sakatonchee Creek/Ellis Bridge)
- Battle of Iuka (site adjacent a highway)
- Battle of Mud Creek (Cane Brake)
- President Grant papers (de facto Presidential Library, MSU)
- General Stephen D Lee Home, Twelve Gables and other Antebellum homes (Columbus)
- Tupelo National Battlefield
- Corinth Civil War Interpretive Center, Battery F and Earthworks
- Corinth Contraband Camp
- Brice's Cross Roads National Battlefield Site
- Tishomingo County Museum (Civil War exhibit)

Heritage Venue Attendance

Various data and information has been collected from heritage and other tourism sites within the MHNHA region. Among the information collected is data on attendance trends, as well as sources and origin of visitors, pricing, hours of operation, travel routes, and other information. Site reconnaissance was conducted to many of the region's sites, and strengths and weaknesses observed with respect to the attraction's or service's presentation, location, interpretation, service delivery, exhibition, resources, design, functionality, funding, management structure, and other elements. Much of this information will be discussed in the refined report with details and assessment of key sites and attractions. Overall attendance information is summarized below.

Festivals

A sample of the major festivals in the region determined that total attendance averages an estimated 20,000 per year, which is a relatively small number, given the range of events and the size of the area. The highest attendance was recorded at Pilgrimage, which attracts thousands each year to Columbus and other cities with historic home tours in the region. The Tupelo Elvis Festival and Howlin' Wolf Memorial Blues Festival also generate thousands of visitors. Certainly there are hundreds of smaller festivals and holiday events but most attract primarily a local audience and few tourists. For example, only about 1% of the attendees at the Market Street Festival in Columbus are reportedly tourists or others from out of the region. There are also specialty events like the Ragtime Festival that attract a very small but dedicated national and even international audience. That festival attracts about 300 ragtime fans

and researchers to Starkville each year. Howlin' Wolf Festival attracts people from 23 states and six countries. Organizers expect that festival's attendance to increase (from 900 at present) once the event moves to a new venue which accommodates twice as many people.

Museums

The nearly 50 museums inventoried for this report indicate a broad range in attendance from those with about 1 visitor per day to those with several hundred visitors per day during the high season. Data on attendance was collected primarily from the museum operators themselves, where the information was available. However, some attendance was estimated or derived based on annual reports or other secondary sources. A sample of museum and visitor center annual attendance is summarized below.

Sample Museum	Annual Attendance
Kosciusko Museum & Visitors Ctr.	480
Natchez Trace Headquarters	268,300
Natchez Trace Visitors Ctr.-Kos	30,000
Howlin' Wolf Museum	7,400
University of Mississippi Museums	17,900
Rowan Oak	5,400
Tupelo Zoo	17,300
Healthworks	22,900
Tupelo Veterans Museum	4,600
Tupelo Automobile Museum	26,900
Elvis Birthplace & Museum	28,800
Tennessee Williams Home/Museum	10,000
Ida B Wells Barnett Museum	4,800
Amory Regional Museum	4,200
MSU Museums & Galleries	2,600
Dunn-Seiler Earth Science Museum	370
Brices Cross Roads NB Interp. Ctr.	5,500
Tishomingo Cty. Historical Museum	570
Iuka Apron Museum	300

Notes: Attendance estimated based on actual data / annual averages, foot traffic, or secondary sources (e.g., Tupelo CVB Monthly Reports).

Sources: Various Museums, Annual Reports, Convention & Visitors Bureaus, and Field Reconnaissance.

The Natchez Trace attracts nearly 270,000 people per year, with its headquarters and visitor center located in Tupelo and other visitor centers located in the region. About 30,000 visit the center at Kosciusko, for example. The Natchez Trace visitor centers are not “museums” but they do contain cultural and environmental heritage exhibits and form the primary interpretation hubs for the Natchez Trace Parkway (NTP), an important heritage corridor. Clearly, Natchez Trace stands out as a major heritage tourism driver for the region.

Aside from the NTP, most museums in the region attract less than 30,000 visitors per year, which appears to be a threshold for museum attendance in the MHNHA. Among the most popular museums in the region are the Elvis Birthplace & Museum, Tupelo Automobile Museum, Ole Miss Museums, and Tennessee Williams’ Home & Museum. Attendance at the Elvis Birthplace is derived based on the written monthly reports submitted in 2011-12 to the Tupelo Convention and Visitors Bureau. However, published attendance numbers generated by the museum itself range much higher, with media quoting the museum director’s figures into the 75,000 to 80,000 range. Regardless of which number is correct, the 8,500 square-foot Elvis Birthplace & Museum is the single most-visited museum and heritage site in the region. The museum is adding another 10,000 square feet in amphitheatre, exhibition space and other components which are anticipated to increase attendance further.

Attendance at the Elvis Birthplace lies in sharp contrast to that of another museum honoring a world-renowned musician, the Howlin’ Wolf Museum. Howlin’ Wolf is undoubtedly a much smaller operation (800 square feet) with limited exhibition space and all-volunteer staff, which nevertheless attracts about 7,400 visitors per year. Elvis’ name and the Elvis “brand” is extremely powerful globally for attracting tourists, many of which pass through the region en route to or from Graceland. Thus, Tupelo captures a share of the 600,000 Graceland visitors who venture out to the Birthplace. By contrast, Clarksdale’s Delta Blues Museum, one of the most-visited museums for that genre, attracts only about 23,000 visitors per year, which is still lower than the Elvis Birthplace in Tupelo. That being said, the healthy attendance rate for Howlin’ Wolf (9.25 visitors per square foot, versus 4.6 at Clarksdale) suggests opportunities for expansion of that museum in order to capture a larger audience.

Natural Areas / Parks

The Mississippi Hills National Heritage Area has a wealth of parkland and natural areas, including at least 10 state parks, two national forests, Natchez Trace Parkway, and a number of lakes and wildlife management areas. These areas provide an understanding of the region’s natural setting prior to the arrival of white settlers, the natural topography, flora and fauna. Man-made lakes and the Tenn-Tom Waterway provide a modern source of recreation and outdoor activity.

Sample Natural Area	Attendance
George Payne Cossar State Park	48,800
Holmes County State Park	37,000
J. P. Coleman State Park	92,100
Hugh White State Park	56,900
John W. Kyle State Park	63,000
Lake Lowndes State Park	96,600
Tishomingo State Park	57,000
Tombigbee State Park	27,000
Trace State Park	68,000
Wall Doxey State Park	48,100
Noxubee National Wildlife Refuge	100,000
Natchez Trace Parkway	268,300
Arkabutla Lake	2,000,000
Crows Neck Env Ed Ctr - Bay Springs Lake	44,900

Note: Attendance based on averages over several years.

Sources: MS Development Authority, Tourism Division; National Park Service, and park operators.

Some of the recreation areas located near Memphis attract the largest crowds, with Arkabutla Lake in Desoto County apparently visited by nearly 2.0 million people per year according to local (unverified) estimates. Some of the wildlife areas attract more than 100,000 people per year, with state parks generating attendance in the range of about 30,000 to 100,000 per year. Some of these resources are concentrated. For example, Tishomingo County has two state parks, a large wildlife management area, a state recreation area, and is crossed by the Natchez Trace Parkway.

Historical Sites

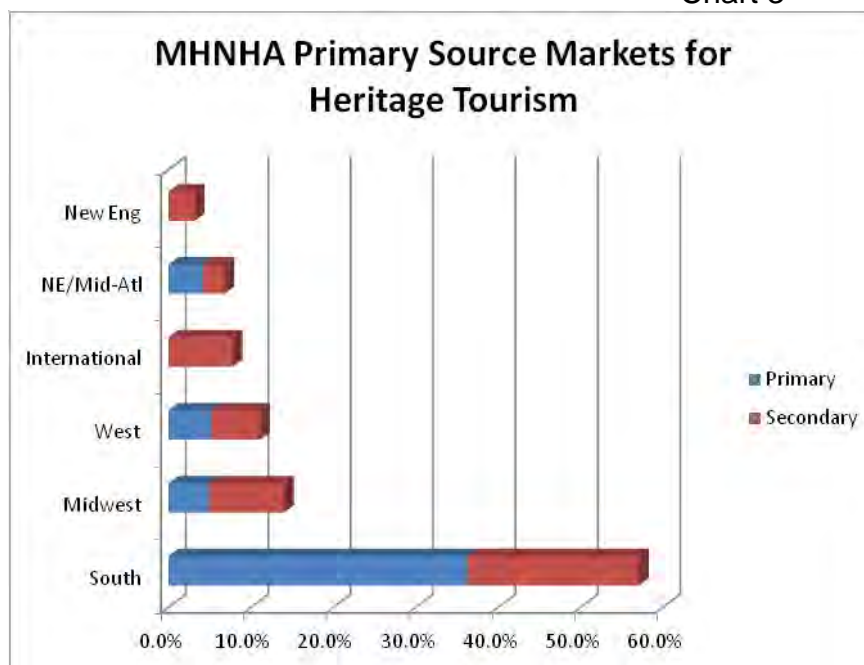
In addition to the various museums, there are a number of other historical sites and districts that provide an anchor for heritage tourism in the MHNHA region. Several of the region's cities and towns have historic districts on the National Register, and attract visitors to historic homes and downtowns during their annual Pilgrimage festivals. For example, Columbus attracts an average of about 8,000 for historic home tours. Smaller cities like Aberdeen attract between 500 and 1,000. Perhaps the premier historic home site in the region is Waverly Plantation, outside of West Point, which attracts nearly 5,000 people per year from around the world. Waverly is a private, family-run operation with little outside funding or support, yet generates substantial tour traffic (some of which is related to Pilgrimage). The exceptional architectural heritage of this plantation home and other historic houses in the region is a primary attraction for many visitors.

Aside from historic houses, there is very limited information on attendance at historic sites in the MHNHA region. Few of the Native American mound sites in the region are marketed or interpreted pro-actively for tourists, although there is written information available on many of the sites. Pharr Mounds may have the highest attendance of Native American sites due to its scale and some marketing of the site. Perhaps the most heavily marketed historic site (other than museums like the Elvis Birthplace) is French Camp, the historic school campus and associated / relocated pioneer buildings in Choctaw County. This site attracts an estimated 8,000 to 10,000 visitors per year in large part due to its location directly on the Natchez Trace Parkway and its active alumni networking efforts. There are other sites like Chief Tishomingo's home site and the historic Iuka Episcopal Church that offer substantial opportunities for further heritage tourism development but attract few visitors at present.

Source Markets

Based on the specific data collected on the various heritage visitor attractions, it is estimated that about 57% of the visitor base is generated by residents of the South, primarily from within Mississippi. About 14% is generated by visitors from the Mid-West, while 11% is generated by visitors from the West. Only about 7% are from the North-East or Mid-Atlantic and 3% from New England. Interestingly, about 8% are international visitors, exceeding the number from the North-Eastern U.S.

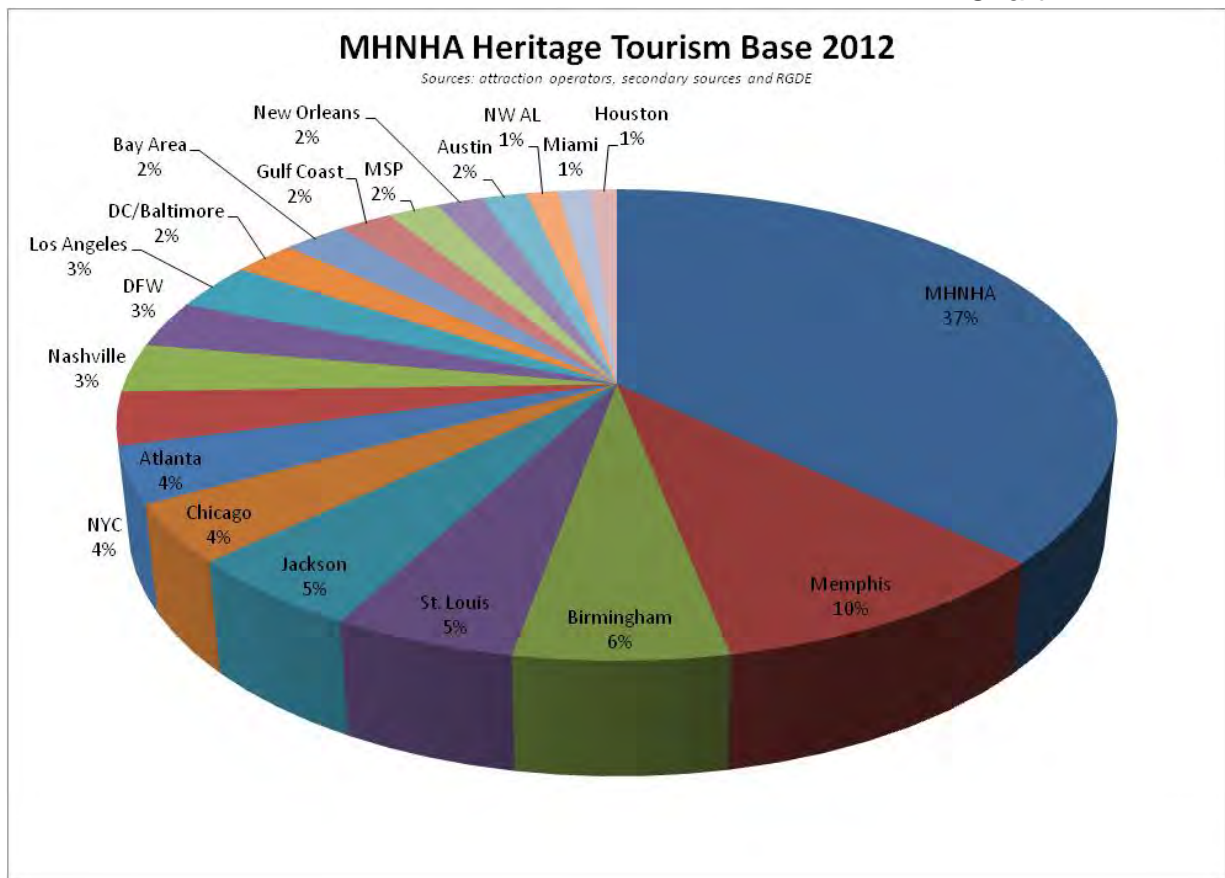
Chart 3



MHNHA attraction attendance data was organized and analyzed by specific city or metropolitan market. This analysis suggests that about 37% of

the visitors at area heritage attractions reside within the 30 counties of the Mississippi Hills National Heritage Area. Outside of this region, the primary U.S. metropolitan markets are Memphis (accounting for 10% of the US metro visitors), Birmingham (6%), Jackson (5%), St. Louis (5%), Chicago (4%), Atlanta (4%), Nashville (3%), Dallas (3%), and Los Angeles (3%). But a number of other metros contributed 1% or more of the US visitors to area attractions, ranging from New Orleans to Miami and northwest Alabama (Florence-Muscle Shoals-Decatur).

Chart 4



As noted previously, the region also attracts a number of visitors from other countries. The United Kingdom is a primary international market, with a large number of rock and blues music fans visiting the region's music heritage sites from various parts of the British Isles. Many of these visitors fly to Atlanta or New Orleans, or via Memphis, and arrive in MHNHA by the bus load. About 40% of the international visitors are residents of the UK, Germany or other parts of Europe. There is also a large number of Canadian visitors, including "snow birds" who migrate seasonally to Florida and other winter warm spots. A growing share (now about 20%) originates in Asia, including Japan, China, and South Korea. Less than 10% originate in South America (mainly Argentina), and there are also visitors from Africa, the Caribbean, and Australia/South Pacific.

Summary

The Mississippi Hills National Heritage Area has a rich heritage, especially as a cultural mélange born of the melding of Appalachian and Delta cultures. The Hills region has a substantive heritage asset base, some of which is already marketed and promoted through the MHNHA and local tourism agencies. Elvis's Birthplace is certainly important, but there are dozens of small museums and no one attraction dominates the tourism mix. The Natchez Trace Parkway provides linkages to various sites throughout the region and remains a key driver for heritage tourism. The area attracts several million visitors per year to heritage sites, museums and natural areas. The region's parks are well-attended, yet many of the region's Native American heritage sites are under-interpreted and there are opportunities for celebrating the unique Chickasaw and Choctaw heritage that calls the region home. There are a number of small local festivals, but only a few that attract a regional or national audience. Nearly 40% of visitors originate from within the region, many others from other parts of the South. However, a relatively large share of visitors travel internationally to experience the trend-setting music of Elvis and Howlin' Wolf, or to view the unique southern antebellum architecture of Waverly Plantation and other beautiful homes.

DRAFT, PRELIMINARY

DRAFT, PRELIMINARY

Section 3. HERITAGE TOURISM MARKET POTENTIALS

Section 3 provides findings from an assessment of market potentials for heritage tourism attractions in the Mississippi Hills National Heritage Area (MHNHA). A demographic analysis was conducted for core travel markets for the MHNHA, in terms of age, education, income and other factors. Demand for heritage tourism is forecasted based on part on participation rates for various types of heritage attractions. The potential for increased heritage tourism within the MHNHA is then forecasted based on the area's capture of regional demand. Key opportunities for growth and expansion of heritage tourism in the area are identified based on the findings from this analysis.

Demographic Analysis

Population was forecasted through 2017 for core heritage tourism markets for the Mississippi Hills National Heritage Area. The overall population of this market base is nearly 15 million in 2012, increasing to almost 16 million by 2017. This represents an increase of more than 1.1 million or 7.5%. The largest core market is the Dallas-Fort Worth Metro, with about 6.6 million. That market is also the fastest growing, expected to add nearly 600,000 people or 8.8% by 2017. Not pictured here are other key markets including Birmingham, St. Louis, Chicago, and Nashville.

Table 4. POPULATION FORECASTS FOR KEY CORE MARKETS, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Market			2012-2017 Change	
	2012	2017	Number	Percent
MHNHA	915,061	955,886	40,825	4.5%
Memphis	1,332,426	1,377,999	45,573	3.4%
Jackson	546,516	567,436	20,920	3.8%
DFW	6,581,212	7,157,311	576,099	8.8%
Atlanta	5,425,233	5,855,341	430,108	7.9%
TOTAL	14,800,448	15,913,973	1,113,525	7.5%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

The MHNHA itself has about 915,000 people but is expected to grow by 4.5% by 2017. Other markets like Birmingham and Memphis are growing, but more slowly. The Jackson market, with only 550,000 people, is growing relatively slowly, adding just about 21,000 people by 2017, yielding a growth rate of 3.8%.

Age Cohorts

The adult population within these core markets is expected to increase by 7.8% by 2017. Population within the 25 to 34 age cohort will decline, but there will be rapid population growth among age cohorts from 55 and above. Much of this growth rates to the continued influence of the “baby boom” generation into their late 60s and 70s. However, people are also living longer and the number in age cohorts older than 75 are also growing rapidly.

Table 5. ADULT POPULATION FORECASTS BY AGE COHORT, CORE MARKETS, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Age Cohort			2012-2017 Change	
	2012	2017	Number	Percent
18-24	1,351,900	1,477,710	125,810	9.3%
25-34	2,237,384	2,135,203	(102,181)	-4.6%
35-44	2,245,191	2,272,139	26,948	1.2%
45-54	2,099,183	2,231,111	131,928	6.3%
55-64	1,458,174	1,772,114	313,940	21.5%
65-74	765,992	1,029,541	263,549	34.4%
75+	573,700	652,652	78,952	13.8%
TOTAL	10,731,524	11,570,470	838,946	7.8%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

Educational Attainment

More than 15% of MHNHA adults have less than a high school education, while only 9.4% have a post-graduate education. Memphis, Atlanta, Chicago, and Nashville have a higher share of adults with post-graduate level education than the other core markets and the USA as a whole. Nearly 19% of MHNHA adults have not attained a high school education and only 5.2% have a graduate degree (less the national average). The low education levels in the region can impact negatively on participation in heritage tourism activities as explained later in this report. Since almost 40% of visitors to the region’s heritage sites originate

from within the MHNHA, then it will be important to either broaden the tourism base or enhance education standards in order to boost attendance at museums, festivals, arts events, historic sites and other heritage activities.

Table 6. EDUCATIONAL ATTAINMENT OF ADULT POPULATION, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012					
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree
MHNHA	18.5%	33.1%	26.5%	16.6%	5.2%
Memphis	13.7%	23.4%	25.6%	26.5%	13.4%
Jackson	16.0%	29.2%	24.3%	22.7%	9.1%
DFW	15.5%	29.4%	26.4%	21.3%	8.7%
Atlanta	13.9%	29.3%	23.6%	23.9%	10.6%
Average	15.5%	28.9%	25.3%	22.2%	9.4%
<i>USA Average</i>	<i>14.7%</i>	<i>28.6%</i>	<i>24.4%</i>	<i>23.2%</i>	<i>10.4%</i>
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Forecasts. The adult population base within the core markets will increase by about 8.7% by 2017. However, the population of adults with at least a college degree will increase at a more rapid pace, and the population with less than college will increase slower. The slowest growth will be among adults with less than a high school degree. Overall, education levels will increase in core markets.

Table 7. ADULT POPULATION FORECASTS BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012-2017				
Education			2012-2017 Change	
	2012	2017	Number	Percent
< High School	5,518,173	5,948,006	429,833	7.8%
High School	11,056,202	12,011,141	954,939	8.6%
Some College	9,407,786	10,215,028	807,242	8.6%
College Deg.	8,885,363	9,717,742	832,379	9.4%
Grad Degree	3,966,144	4,337,251	371,107	9.4%
TOTAL	38,833,668	42,229,168	3,395,499	8.7%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

Income

Earnings in the sample core markets range from \$17,622 for those with less than a high school education to almost \$58,300 or those with a post-graduate degree.

Table 8. AVERAGE EARNINGS BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012					
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree
MHNHA	\$ 17,124	\$ 24,889	\$ 30,669	\$ 44,290	\$ 51,024
Memphis	\$ 16,288	\$ 25,920	\$ 31,129	\$ 55,815	\$ 71,775
Jackson	\$ 17,952	\$ 25,041	\$ 31,766	\$ 46,294	\$ 55,355
DFW	\$ 18,341	\$ 25,655	\$ 31,482	\$ 46,255	\$ 58,313
Atlanta	\$ 17,061	\$ 25,741	\$ 31,972	\$ 44,088	\$ 54,976
Weighted Ave	\$ 17,622	\$ 25,628	\$ 31,574	\$ 46,333	\$ 58,296
USA Average	\$ 18,413	\$ 26,349	\$ 31,928	\$ 47,422	\$ 62,618
Marginal Incr.		43.1%	21.2%	48.5%	32.0%
Sources: U.S. Bureau of the Census and Randall Gross / Development Economics					

Those core market adults with at least a high school degree have 43.1% higher incomes than those with less than a high school education. Those with a college degree have 69.7% higher incomes on average than those with a high school education. Nashville, Memphis, and Chicago income levels are generally higher for those with at least a college degree. In MHNHA, incomes are generally lower for those with at least a high school degree. Overall, incomes are closely correlated with education in the region, as illustrated in the chart at right.

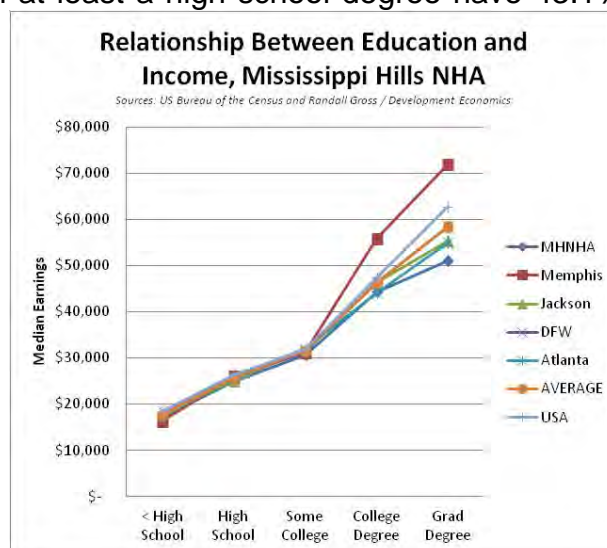


Chart 5

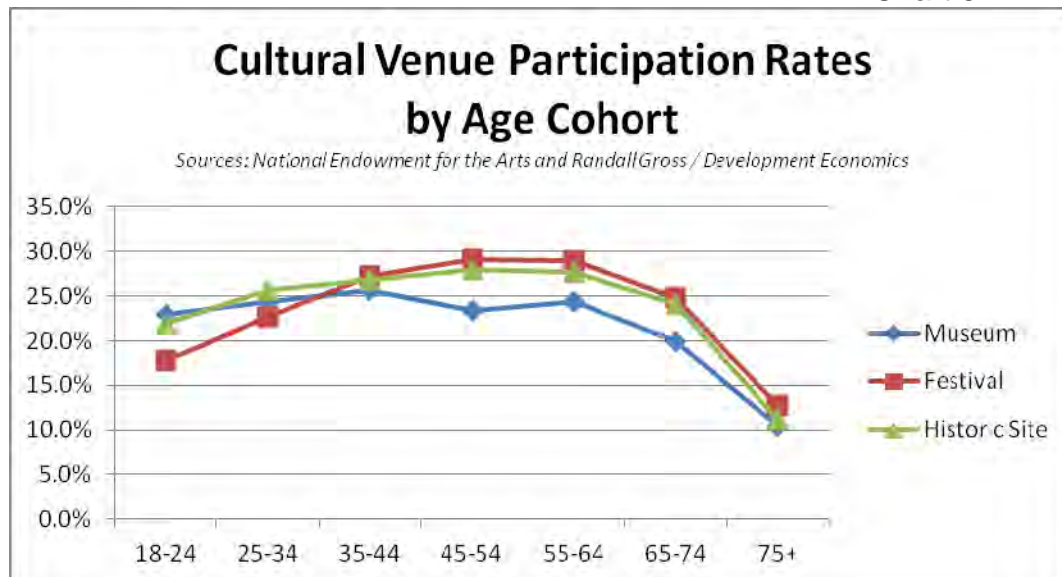
Culture & Heritage Venue Participation Rates

Participation rates were analyzed for heritage & cultural venues based on age, educational attainment, and income (earnings). The participation rates provide an indication of how likely core market residents are to visit heritage sites.

Participation by Age

Participation rates for culture and heritage venues peaks for those aged 45 to 64, but are generally flat for most age cohorts until age 74. Participation rates for seniors 75 years or over are significantly lower than they are for younger adults.

Chart 6

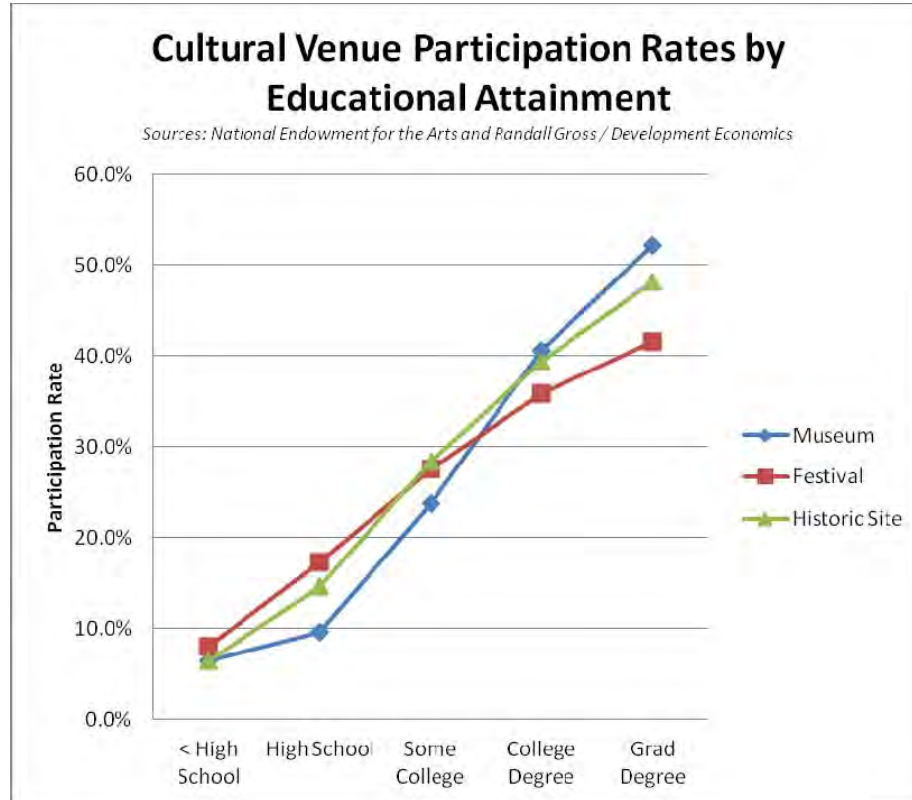


Museum participation rates are relatively constant for all age cohorts (except for seniors), when compared with those for festivals and historic sites.

Participation by Educational Attainment

There is a very strong correlation between heritage participation rates and education levels. In general, the higher the education level achieved, the higher the participation rate for cultural and heritage venues. The participation rate for those with less than a high school degree is less than 10% within the core markets. By comparison, participation rates increase to nearly 40% for those with a college degree and 50% for those with a post-graduate degree. There is some variation by type of venue. For example, participation rates for museums are more highly dependent on higher education levels than those for festivals. These participation rates are illustrated below.

Chart 7



Participation Rates by Income Cohort

As noted earlier, income (as measured by earnings) is highly correlated with educational attainment nationally and within the core markets. Thus, it is not surprising that participation rates also increase with incomes, which increase with education levels.

Museum participation rates increase dramatically for those with the highest incomes, perhaps due to a combination of higher levels of education and interest, with available leisure time, and money for entrance fees. By contrast, participation rates for festivals tend to flatten among those with the highest incomes.

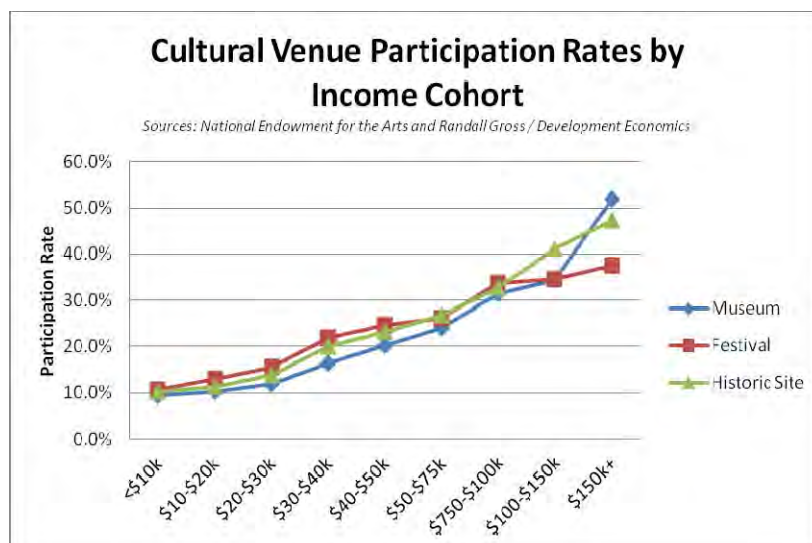


Chart 8

Overall, participation rates have declined for all types of cultural activities and heritage venues over the past 10 to 15 years. Some of this decrease occurred as a result of economic conditions, but some is also due to competition from other activities such as electronic media.

Audience Forecasts

Based on population forecasts, participation rates and other data, the audience for cultural heritage venues within core MHNHA markets was forecasted through 2017. The audience for museums, festivals and historic sites was analyzed and forecasted, as summarized below.

Museums

This analysis identified an existing museum audience of 9.3 million, which is expected to increase substantially by about 350,000 or 3.7% by 2017.

Table 9. MUSEUM AUDIENCE FORECASTS BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012-2017				
Education	2012-2017 Change			
	2012	2017	Number	Percent
< High School	358,681	386,620	27,939	7.8%
High School	1,061,395	1,141,058	79,663	7.5%
Some College	2,239,053	2,226,876	(12,177)	-0.5%
College Deg.	3,607,457	3,751,048	143,591	4.0%
Grad Degree	2,070,327	2,177,300	106,973	5.2%
TOTAL	9,336,914	9,682,903	345,989	3.7%
Sources:	U.S. Bureau of the Census, Claritas, and Randall Gross / Development Economics.			

The growth in audience is expected among those with a post-graduate degree, followed by those with a high school and college degree. Overall, growth of 3.7% is relatively substantial and represents a balance between stagnating participation rates and growing population base in the region.

Audience by Type of Museum. The audience for museums was disaggregated by type of museum, with science & industry and art museums accounting for the largest share of museum audience in the core markets. The

history museum audience is estimated at about 1.81 million, increasing to about 1.88 million by 2017. However, history museum audiences will grow at a slower pace than those for art and science museums.

Table 10. MUSEUM AUDIENCE FORECASTS BY TYPE OF MUSEUM, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012-2017				
Museum Type	2012-2017 Change			
	2012	2017	Number	Percent
History	1,814,068	1,879,354	65,286	3.6%
Amer. Indian	553,589	574,103	20,514	3.7%
Science & Ind.	3,662,203	3,817,276	155,072	4.2%
Natural History	2,895,695	3,017,523	121,827	4.2%
Art/Design	3,307,055	3,468,332	161,278	4.9%
TOTAL	9,336,914	9,739,064	402,150	4.3%
Source	Randall Gross / Development Economics.			

Historic Sites

The audience for historic sites is estimated to total about 10.1 million in 2012, expected to increase by about 350,000 to 10.4 million by 2017. The existing audience is disaggregated by education levels, below.

Table 11. HISTORIC SITE AUDIENCE BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012						
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree	TOTAL
MHNHA	8,149	32,933	51,358	44,700	17,107	154,247
Memphis	8,574	33,125	70,542	101,117	62,446	275,804
Jackson	4,122	17,093	27,625	35,864	17,537	102,241
DFW	47,291	202,760	354,601	396,551	197,892	1,199,095
Atlanta	35,426	169,242	264,316	372,213	201,462	1,042,660
Other/Foreign	252,360	1,159,052	1,903,370	2,550,387	1,411,271	7,276,442
TOTAL	355,922	1,614,205	2,671,811	3,500,833	1,907,715	10,050,487
Sources:	U.S. Bureau of the Census, National Endowment for the Arts, Claritas, Inc.; and Randall Gross / Development Economics.					

The overall audience for historic sites is forecasted for 2017, below.

Table 12. HISTORIC SITE AUDIENCE BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2017						
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree	TOTAL
MHNHA	8,272	32,847	51,341	43,977	17,139	153,577
Memphis	8,645	32,818	70,047	98,816	62,146	272,472
Jackson	4,154	16,924	27,413	35,025	17,441	100,958
DFW	49,867	210,064	368,213	405,241	205,944	1,239,329
Atlanta	37,229	174,748	273,537	379,087	208,953	1,073,554
Other/Foreign	263,583	1,202,147	1,977,720	2,633,419	1,483,512	7,560,381
TOTAL	371,750	1,669,549	2,768,273	3,595,564	1,995,136	10,400,272
Sources:	U.S. Bureau of the Census, National Endowment for the Arts, Claritas, Inc.; and Randall Gross / Development Economics.					

The audience for historic sites is likely to decline in several core markets for MHNHA, including the local market and nearby Memphis, Birmingham, and Jackson. The audience will increase modestly in the Nashville, DFW, Atlanta, and Chicago Metro Areas, but there will be an even larger increase in the audience generated by foreign countries. These forecasts assume some continued decline in participation rates for historic sites. However, overall audience growth can outweigh the decrease in participation in higher-growth markets.

Festivals

The festival audience totals nearly 9.8 million in 2012, increasing to about 10.7 million by 2017. The audience generated by areas of the country outside of the core markets and by foreign visitors is estimated at more than 7.0 million. The largest share of this market would be generated by those with a college degree or some college. The overall festival-going audience base in 2012 is estimated by level of educational attainment in the following table.

Table 13. FESTIVAL AUDIENCE BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2012						
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree	TOTAL
MHNHA	10,170	39,023	49,730	40,616	14,795	154,335
Memphis	10,700	39,251	68,306	91,878	54,007	264,143
Jackson	5,145	20,254	26,749	32,587	15,167	99,902
DFW	59,022	240,256	343,363	360,318	171,150	1,174,110
Atlanta	44,213	200,541	255,940	338,204	174,238	1,013,136
Other/Foreign	314,961	1,373,398	1,843,052	2,317,357	1,220,559	7,069,327
TOTAL	444,213	1,912,723	2,587,141	3,180,960	1,649,916	9,774,953
Sources:	U.S. Bureau of the Census, National Endowment for the Arts, Claritas, Inc.; and Randall Gross / Development Economics.					

The festival audience is expected to increase through 2017, as shown below. That audience would expand in all markets over the five-year period.

Table 14. FESTIVAL AUDIENCE BY EDUCATIONAL ATTAINMENT, CORE MARKETS, MISSISSIPPI HILLS NHA, 2017						
Market	Less Than High School	High School	Some College	College Degree	Graduate Degree	TOTAL
MHNHA	10,787	41,118	52,478	42,669	15,500	162,553
Memphis	11,273	41,082	71,598	95,878	56,201	276,033
Jackson	5,417	21,185	28,020	33,984	15,773	104,379
DFW	65,026	262,958	376,366	393,193	186,245	1,283,788
Atlanta	48,546	218,750	279,593	367,817	188,966	1,103,672
Other/Foreign	343,712	1,504,845	2,021,507	2,555,128	1,341,611	7,766,804
TOTAL	484,762	2,089,938	2,829,563	3,488,669	1,804,297	10,697,230
Sources:	U.S. Bureau of the Census, National Endowment for the Arts, Claritas, Inc.; and Randall Gross / Development Economics.					

MHNHA Audience Potential

The audience for heritage venues and cultural facilities within the Mississippi Hills National Heritage Area was forecasted based on the area's capture within the competitive market. Each of the core markets and other markets globally, have competitive heritage sites that will capture some of the demand for heritage programs and audience support facilities. The area's overall potentials are discussed below, for museums, festivals, and historic sites, with a focus on core market sources. Other tourism markets, including foreign sources, were also analyzed.

Museums

The MHNHA has potential to attract an audience of up to 181,000 in 2017, including 55,000 for history museums, 62,000 for science & industry museums, 54,000 for art museums and 11,000 for American Indian museums.

Table 15. MUSEUM AUDIENCE POTENTIAL FORECASTS BY TYPE OF MUSEUM, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Education			2012-2017 Change	
	2012	2017	Number	Percent
History	49,900	54,700	4,800	9.6%
Amer. Indian	8,400	10,500	2,100	25.0%
Science/Ind	60,500	62,000	1,500	2.5%
<i>Nat. History</i>	<i>47,800</i>	<i>49,000</i>	<i>1,200</i>	<i>2.5%</i>
Art/Design	49,800	53,600	3,800	7.6%
TOTAL 1/	168,600	180,800	12,200	7.2%
Source:	Randall Gross / Development Economics.			

The fastest growth in audience support would be for American Indian museums, followed by history, then art & design. History museum audiences in the region are expected to grow by about 9.6% over the next five years.

Net Potential and Facility Size. The potential audience for museums was compared with the existing audience to determine where there is "net" potential for growth or development. This analysis found that there is potential for capturing an audience of about 181,000, and there are current museum facilities

that capture an audience of just over 107,000. Thus, the “net” demand would be for attracting an audience of about 74,000 by 2017.

Table 16. MUSEUM AUDIENCE GROWTH POTENTIAL BY TYPE OF MUSEUM, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Museum Type	Current	Potential	Net	Percent
History	43,592	54,700	11,108	25.5%
Amer. Indian	1,500	10,500	9,000	600.0%
Science & Ind.	46,973	62,000	15,027	32.0%
Art/Design	15,039	53,600	38,561	256.4%
TOTAL	107,103	180,800	73,697	68.8%
Source:	Randall Gross / Development Economics.			

This potential would include a net audience of about 10,000 for American Indian museums, 15,000 for science & technology, 39,000 for art & design, and 11,000 for history. This potential translates into total museum square footage of about 35,000 to 40,000 square feet of space, including about 5,000 square feet for history museums.

Table 17. MUSEUM SPACE POTENTIAL, MISSISSIPPI HILLS NHA, 2017		
Type	Attend	Space (SF)
History	11,108	4,600
Amer. Indian	9,000	7,600
Science & Ind.	15,027	7,400
Art/Design	38,561	15,100
TOTAL	73,697	34,700
Source:	Randall Gross / Development Economics.	

After accounting for existing museums, the potential would translate into up to about 40,000 square feet of net demand including about 8,000 to 10,000 square feet for Native American museums, 8,000 to 10,000 square feet for

science & industry, 5,000 square feet for history, and 15,000 to 20,000 square feet for art & design.

Historic Sites

MHNHA could capture audience support totaling 771,000 by 2017. Of this, nearly 77,000 would be generated by the local, MHNHA market. An audience of more than 600,000 would be generated from outside of the sample core markets, throughout the U.S. and abroad.

Table 18. HISTORIC SITE AUDIENCE POTENTIAL, CORE MARKETS, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Market	2012	2017	2012-2017 Forecast	
			Number	Percent
MHNHA	77,123	76,789	(335)	-0.4%
Memphis	41,371	40,871	(500)	-1.2%
Jackson	8,179	9,086	907	11.1%
DFW	11,991	14,872	2,881	24.0%
Atlanta	20,853	24,692	3,839	18.4%
Other/Foreign	582,115	604,830	22,715	3.9%
TOTAL	741,633	771,140	29,507	4.0%
Sources:	Randall Gross /Development Economics.			

Overall, the audience for historic sites is declining in the areas closest to the MHNHA, including the Memphis and Birmingham metros, although there will be growth generated by Jackson as well as by Dallas, Nashville, Atlanta, and Chicago.

Festivals

The MHNHA could capture a festival audience of up to about 224,000, an increase expected by 2017 of 12.8%. Atlanta, Memphis, and Nashville will generate the fastest growth in festival-goers captured by the MHNHA. But, the largest share of attendance would still be generated by residents of the 30-county heritage area region.

Table 19. FESTIVAL AUDIENCE POTENTIAL, CORE MARKETS, MISSISSIPPI HILLS NATIONAL HERITAGE AREA, 2012-2017				
Market	2012	2017	2012-2017 Forecast	
			Number	Percent
MHNHA	77,168	79,651	2,483	3.2%
Memphis	39,621	44,165	4,544	11.5%
Jackson	4,995	5,219	224	4.5%
DFW	35,223	38,514	3,290	9.3%
Atlanta	20,263	33,110	12,847	63.4%
Other/Foreign	21,208	23,300	2,092	9.9%
TOTAL	198,478	223,959	25,481	12.8%
Source:	Randall Gross /Development Economics.			

Festival audience growth within the MHNHA will be relatively slow as compared with audience growth generated by other core markets and other areas of the country. Since the vast majority of festival attendance is generated from local sources, the lack of audience growth within the 30-county core market suggests slow growth in support to the MHNHA festival market.

That being said, the area only generates major festival attendance in the 20,000 to 30,000 range (with all event attendance estimated at around 100,000). This analysis indicates that the market is under-served for larger festivals and could potentially attract larger regional and national audiences. With current attendance at less than one-tenth of regional festival potential, there is the opportunity to expand on the existing festival offering.

Summary

Cultural and heritage tourism audiences are generally better educated, more affluent, and have “higher expectations” for travel experiences that are pleasurable and educational at the same time. Authenticity is a key for capturing these potential heritage tourism audiences. Heritage tourists spend more (\$623 versus \$457 by other travelers per average trip). They also travel longer, at 5.2 nights on average versus 3.4 nights for other types of travelers. Core audience markets for MHNHA include the 30-county Hills region, plus nearby metros including Jackson, Memphis, and Birmingham as well as Nashville, Atlanta, Dallas and Chicago, among others. But a large share of attendance would also be generated by visitors from outside of these core markets, including a growing

base of foreign tourists. The MHNHA museum audience, forecasted at 74,000, could support potential for another 35,000 to 40,000 square feet of museum space within the next five years. The fastest growth and least served museum market would have a Native American theme. The region has a plethora of history museums but there is a dearth of art museums and an opportunity for further development within that arena. The area can also expect historic site audience growth potential of 30,000 people and festival audience growth potential of more than 25,000. Opportunities for capturing this growth through new, expanded, or enhanced museums, historic venues, and festivals are discussed in the section that follows.

DRAFT, PRELIMINARY

DRAFT, PRELIMINARY

Section 4. PROGRAM & PROJECT CONCEPTS

This section provides preliminary recommendations on potential project and program concepts, based on the findings of field reconnaissance, inventories, existing heritage site assessments, and market potentials analysis. The Mississippi Hills National Heritage Area is not new to heritage tourism. Nor is the area lacking in heritage tourism sites. The area already has a substantial inventory of heritage attractions, especially museums that are being marketed to the public. Heritage tourism is marketed through the existing Mississippi Hills NHA organization. The broader region is marketed and promoted for tourism by the MHNHA as well as by local and county convention and visitors bureaus.

As such, the primary objective of this section is not to “reinvent the wheel,” but rather to add value to existing and proposed attractions, services, and broader heritage tourism opportunities based on the various assessments completed herein; and, where appropriate, recommend other visitor attractions or services that can fill a niche or gap in the market. Ultimately, the key recommendations will relate to project and program implementation, and on the role of the MHNHA in assisting with implementation. Those recommendations will be developed following input from the charrette process.

Enhancements to Existing Attractions

The assessment of existing heritage attractions found that most have an excellent record of serving the public by interpreting the heritage of the region and providing an education resource. The region is particularly well-placed in designating historic homes as part of National Register Historic Districts. At the same time, there is a serious need for various levels of enhanced interpretation, design, education and outreach, curatorial services, protection and security, marketing, management, funding, strategic planning, and overall delivery for many of the region’s individual heritage sites and attractions.

Protection and Designation

Most urgently, there is a need for identifying and protecting sensitive and at-risk heritage sites, particularly those relevant to Native American cultures and heritage. There are artifacts in various public collections throughout the region that appear to lack proper interpretation. Many of these artifacts have survived up to 10,000 years, but are now on display without proper protection from air and environmental conditions.

More importantly, the region is important as the home not only of civilizations that predate modern history, but also of two of America's great nations, the Chickasaw and the Choctaw, which share some common culture and strong links to northeast Mississippi. The return of a major site of significance to the Choctaw people in 2008 was cause for great celebration. Now there is the need to examine how best to ensure that this and other Native American sites are protected and celebrated for their people; and that this heritage is related and interpreted for the education of MHNHA residents and visitors.

Even where collections are well-catalogued and researched, there is also a dearth of funding for protecting key assets. At Ole Miss, the library struggles to maintain appropriate conditions to protect its collections of original Faulkner papers, civil rights documents, and blues music paraphernalia in terms of humidity controls and other factors that have a direct impact on these assets.

Interpretation: Research, Technology, and Curatorial Services

The region is somewhat unique in that MHNHA has access to exceptional resources in research, technology, and curatorial services to help properly identify, protect, and interpret the heritage assets that form the core of heritage tourism marketing. There is substantive research activity at Ole Miss, MSU and other area universities, and in-house knowledge of interpretation, curatorial services, and modern technologies that can be used to enhance the visitor experience. At issue is how to maximize these resources for the benefit of the region and how to increase access and exposure to in-house university collections.

Native American Heritage. Native American heritage is the least researched, understood, protected and interpreted in the region. Few of the ancient sites are identified or interpreted, other than some minor interpretation of one or two mound sites. There are a few sites that celebrate the heritage of Tishomingo, the last great Chickasaw Chief, and some collections have been integrated into local county museums. But those collections tend to consolidate all pre-historic and modern Native American peoples into one exhibit (typically focused on arrowheads) without much interpretation of the lifestyles, history, or culture of ancient peoples nor of the modern Chickasaw and Choctaw nations. Few of the sites are actually controlled or operated by the nations themselves. Clearly there are opportunities for partnerships between MHNHA, the universities, and the nations on developing opportunities to interpret this rich heritage.

Music & Literature Heritage. The region is exceptionally rich in literary and musical heritage. There are several key sites that successfully interpret this heritage, but there are also opportunities for enhancing the overall access and interpretation of this heritage for tourism. The region's musical heritage is

marketed through individual sites and disparate tour routes that could be made stronger and more integrated. For example, Elvis fans are directed to/from Memphis, Nashville and New Orleans to visit his birthplace in Tupelo. Howlin' Wolf fans are directed through the Mississippi Blues Trail to visit his museum in West Point. Integrating these diverse aspects of the Mississippi Hills, in line with the overriding theme of Appalachia meets the Delta, can strengthen the overall product. Individual collections like the Ragtime and music business collections at MSU and the Blues collection at Ole Miss are housed internally at those universities and do not have a presence "on the street" that engages with the visitor. Exposure, such as through museums and festivals help to bring visitors to Main Street and create more beneficial spin-offs for local businesses and downtown preservation. Tour routes that connect these sites more effectively will help maximize that exposure.

Similar issues impact on the marketing of the region's literary heritage. The Hills has a number of sites which are not geographically linked in formalized and pro-actively-marketed tour routes (other than sites plotted on a map). Further, Blue Mountain gave birth to the Southern Literary Festival and the event has returned to the area recently. There is the opportunity for developing a Southern Literary Tour in conjunction with the festival that would promote the Mississippi Hills at the core of this effort but would also encourage expansion to other noteworthy literary "hot spots" in the South. Linking the various sites and events can help enhance interpretation and promote the region more effectively for heritage tourism.

African-American Heritage. Again, while there are individual sites that interpret African American heritage and the civil right struggle, there is a need for enhanced linkages in order to "tell a story" of how this region played an important role in that struggle. The interpretation of sites and the overall tour routing should be considered as a sort of "screenplay" of the story of African-American culture, history, and struggle for civil rights in the region. As with music, literature, and Native American heritage, much of the region's exceptional African-American history is archived within the "ivory tower" of universities where it is less accessible to the public. Even at historically-black Rust College, the university's African art collection is housed in quarters that are not readily accessible on an ongoing basis during normal working hours. The very interesting history of that university is not yet interpreted thoroughly for the visitor. Having rotating exhibitions of university collections at more public venues in Main Street locations (whether through interpretation centers, sites, or museums) can help enhance exposure and create more tourism draw to the region that will spin-off benefits to the local communities.

Civil War. The Civil War heritage at key sites like Corinth, Brice's Cross Roads, and Tupelo is well-interpreted with the backing of funding from the federal government or other key sources. These sites have also benefited from exposure during the Sesquicentennial that has brought more visitors to many of the Civil

War sites nationwide. What may be lacking is a more extensive interpretation of the role of African-Americans during the War and in the aftermath, which can be easily integrated with the story of the African-American struggle for civil rights.

Architecture. The MHNHA is marketing a theme relating to the region's architecture. Architecture, in and of itself, may present challenges as a marketing tool other than during spring Pilgrimage home tours. That being said, the broad marketing concept of Appalachia meets the Delta is borne out through the region's architecture, ranging from mountain cabins to cotton plantations. Such themes or unique characteristics would need to be interpreted in order to differentiate the region from every other part of the country which can claim to have "architecture." Again, a critical pathway for interpretation is through driving tours and other linkages that tell the story of what makes this region so unique.

Design

There are a number of issues associated with design of interpretive facilities, including museums and facilities associated with historical sites, signage, downtown buildings and streetscapes, roadways and other linkage features. The region is home to a relatively large number of museums, but some of the key collections are exhibited (or held in archives) within the walls of academic institutions where they are less accessible to the general public. Where exhibited, the collections do not typically benefit from the latest technologies to assist with interpretation. In a time when the Internet and hand-held technologies are increasingly competing for the tourist's attention, there is a need to ensure that collections take advantage of new technologies and approaches for interpretation.

Other design issues relate to the lack of directional signage, tour signage, and inconsistent signage throughout the area. Several municipalities have made an excellent investment in themed signage that allows the visitor to maneuver to key heritage sites without problem. Electronic applications are slowly being developed to assist visitors and to interpret sites in several locations. At the same time, much of the area remains unsigned and un-interpreted, particularly outside of the main towns. Thematic interpretation through consistent signage is very important in branding and establishing the unique characteristics of this heritage area throughout the region. At the same time, unique signage and streetscape design can be used in individual communities to highlight the unique character and identity of those towns. For example, Vardaman is a town with a unique identity as the Sweet Potato Capital of Mississippi, which can be played whimsically through its signage, streetscape, and other design elements. Resources should be targeted for design and other downtown improvements in such communities to ensure that they share in the heritage tourism benefits generated in the region.

Education & Outreach

A primary function of museums and many historical sites is to educate the public. There is a need for greater education and outreach programming not only to bring students to the region's heritage facilities but also to generate greater research and interest in the region's assets, particularly those relating to the literary, Native American, music and African-American heritage of the area. To some extent, the region's events and festivals celebrate this heritage. But there is also an opportunity for further outreach and development of educational materials and resources.

Strategic Planning

There is a dire need for strategic planning for individual heritage sites and attractions, and for broader coordinated efforts such as the event schedule and new attraction development. Marketing, management, development (funding), capital planning, and overall visioning should be guided through 5-year strategic plans for each anchor facility and collections of key sites. A large number of attractions in the area lack any strategic plans to guide their operations and ensure sustainability. Many of the area's heritage sites and museums have been maintained and operated by volunteers and local residents who truly love and cherish their history. There is no replacement for such dedication. At the same time, there is a need to ensure sustainability over time and maximize the potential of these attractions to capture a market and deliver economic spin-off and benefits to the region.

Proposed Concepts

Several proposed concepts for development in the Mississippi Hills National Heritage Area are provided below. Some of these concepts have already been identified or discussed in the region. The purpose of this effort is to identify concepts in relation to their market support and economic viability, as a basis for implementation strategies.

- **Chickasaw and Choctaw Nations Heritage Trail.** There are proposals for development of a museum in the MHNHA that would interpret and celebrate Native American heritage. Clearly, the opportunity exists based on the gap in interpretation of this rich history and the potential market base. The market assessment broadly identifies a short-term potential market for 7,000 to 10,000 square feet of Native American interpretive facilities.

That being said, both the Chickasaw and Choctaw have been proactively developing cultural interpretation centers elsewhere in both Mississippi and Oklahoma. The Chickasaw have recently opened a beautiful, 96,000

square-foot Chickasaw Cultural Center in Sulphur, Oklahoma that includes interactive exhibits, a spirit forest, council house, gardens, theatres, traditional village, education center, and other elements. The associated 20,000 square-foot Holisso Center focuses on Chickasaw cultural research. In Mississippi, the Choctaw have established a strong interpretive component at Pearl River Reservation in Neshoba County, just south of the MHNHA. The Chahta Immi Cultural Center and Choctaw Museum form part of this complex.



Rather than establishing yet another large museum, it may be more appropriate to create a heritage trail to various sites of significance, anchored by smaller education & interpretation facilities, coupled with an amphitheatre for live performances and existing or new recreation areas that would be welcoming to locals as well as tourists. The trail could focus on the region's environment and build off of existing parks such as Tishomingo State Park that already celebrate a Native American theme. The concept is only introduced here but would have to be vetted, detailed, and established by the two nations themselves. The program for interpretive facilities along the trail would then need to be tested further and the concept refined. However, based on the work completed herein, it would be recommended that such a trail include the following:

- Designation of an official Chickasaw and Choctaw Heritage Trail that would be sanctioned by the Mississippi bands of the respective Chickasaw and Choctaw nations. The trail would include the Pearl River reservation and Neshoba County, where the existing Choctaw cultural facilities are located.
- New festival celebrating Native American cultures and welcoming to all.
- Location of small Native American-themed interpretive facilities in the vicinity of sites important to both Chickasaw and Choctaw nations. The interpretation facilities could incorporate both permanent and changing exhibitions, but with a focus on education and on the northeast Mississippi environment and its role in the nations' heritage. Key elements might include:
 - Space for rotating exhibits of national significance
 - Environmental education
 - Outdoor Amphitheater for live performances, education activities, and celebrations
 - Recreation activity areas
 - Sites perhaps associated with:
 - Chief Tishomingo's home site
 - Sites of prehistory significance (e.g., those developed by mound-building societies that pre-dated the modern Chickasaw and Choctaw nations)
 - Natchez Trace
 - Nanih Waiya (Choctaw "Mother Mound")
 - Pontotoc, "Center of Government"
- Signage at lesser sites and directional signage throughout the region with a common MHNHA logo and trail branding
- Engagement with Native American communities in the region and nationwide. Such engagement should be pro-active for planning and visioning purposes, but specific interpretive design should be left to top-rated exhibition design professionals.
- Focus on the Chickasaw and Choctaw nations' heritage while acknowledging the full 10,000-year period of human habitation in the region.
- Focus on learning about the environment from Native American culture
- Interactive exhibitions using the highest level of modern but sustainable technologies and de-emphasis on static displays
- Strong educational facilities and program
- Archeological efforts, acceptable to Native American peoples and using modern technologies and engagement through training and education
- Protection and interpretation of sites is paramount

- Inclusion of modern history, with a particular emphasis on the Trail of Tears and modern American Indian communities in northeast Mississippi.
- Linkages with other Native American sites outside of the region, particularly in Oklahoma, where the two nations were forcibly relocated.
- **Mississippi Hills Music Festival.** There are several music festivals in the region that focus on specific genres. For example, there is the Down from the Hills Heritage Music Festival & Sparks Family Music Festival (Bluegrass), the North Mississippi Hill Country Picnic (Hill Country Blues), and Elvis Fest (Rock n Roll). There is also the opportunity of greatly increasing the marketing exposure and tourism potential of the region by establishing a regional music festival that captures the broad range of musical styles and genres that have been associated with the Mississippi Hills. This festival could include Hill Country Blues, Country & Bluegrass Music, and Rock n Roll, all of which have benefited tremendously from the Hills' influence. The music festival would complement rather than compete with other festivals and events in the region, and would help strengthen the region's unique brand. The festival would bring together very diverse fans who share a love of all types of music. Diverse food and craft would add to the cultural milieu. Key components would include



Images courtesy North Mississippi Hills Country Picnic

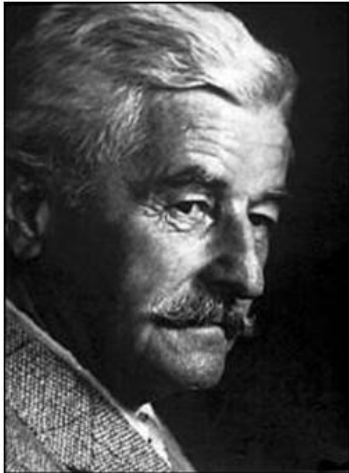
- Location with good access to key metro markets (i.e., Atlanta, Memphis, Nashville) and representative of the diverse geographic landscape of the MHNHA
- A focus on Blues, Bluegrass, and Rock n Roll with a local connection
- An education component that builds on the region's unique musical contributions and characteristics.
- Tie-ins that build on other music festivals, rather than competing with them.
- Tie-ins with regional music marketing, including the "American Music Triangle" that includes Memphis, Nashville and Tupelo.

- Tie-ins with a more detailed local music tour route for destination travelers to the MHNHA.
- **Literary Heritage Exhibition Spaces.** Many of the South's greatest writers and journalists originate from the Mississippi Hills. The homes of Faulkner in Oxford and Williams in Columbus are shrines to their devotees and attract international visitation. Journalist Ida B. Wells is also honored through visits to her home in Holly Springs. By the same token, little has been done to celebrate the life of Kosciusko native Oprah Winfrey, whose rise from rags to riches is the American dream incarnate. In addition to these homes, the region houses a great wealth of literary history in the form of documents and papers, recordings, and artifacts that are held inside the cloistered walls of academic institutions. There is a need to protect these materials but also to make them more accessible to the public. It is unlikely that any of the institutions would relinquish control of their materials to be placed in a central museum. However, there is the opportunity perhaps of creating exhibition spaces where literary artifacts could be placed on loan or tour on an ongoing basis, with resources shared between the various institutions. Such exhibition spaces could be created in several locations throughout the region in order to strengthen the overall branding of the MHNHA as a literary heritage hub. Key components of this approach include:



- Use of “Main Street” buildings in various communities throughout the region. Ideally, such spaces would have storefront visibility (rather than sequestration again in libraries or government buildings).
- Can operate on a rotating basis so as to “spread the wealth” of tourism to various communities.
- Safety and security would be the primary concern and institutions will no doubt look to the most permanent and secure locations.
- Exhibitions could be slated with openings in order to build momentum and press interest.

- The spaces do not necessarily need to be located in the same towns where the primary sites (i.e., homes) are located, but there should be some connection between the location and the exhibition. For example, an exhibition might be placed in New Albany, which is the birthplace of Faulkner.
- **Southern Literary Bus Tour.** A pro-active effort is recommended for establishing and marketing a bus tour route of Southern Literary sites, with a particular focus on northeast Mississippi. The bus tour would focus on sites relating to significant authors, festivals, and sites that drive a quintessentially southern perspective of the world and establish a world view of the South. The exhibition spaces noted above could become a key element of the tour. The components of this tour would include the following:



- Centralized ticketing through national agencies
- Tour headquarters and research base at Oxford
- Air/bus packages from Memphis, Nashville, Atlanta, Charleston, Charlotte, and Birmingham.
- A focus on the following writers and others:
 - William Faulkner (Oxford/Rowan Oak & New Albany, MS)
 - Eudora Welty (Jackson & West Point, MS)
 - Tennessee Williams (Columbus, MS)
 - John Grisham (Starkville, MS)
 - Richard Wright (Natchez/Jackson, MS)
 - Oprah Winfrey-journalist (Kosciusko, MS)
 - Ida B Wells-journalist (Holly Springs, MS)
 - Shelby Foote (Greenville, MS)
 - Helen Keller (Tuscumbia, AL)
 - Harper Lee (Monroeville, AL)
 - F Scott Fitzgerald (Montgomery, AL)

- Winston Groome (Mobile, AL)
 - Truman Capote (New Orleans, LA)
 - Anne Rice (New Orleans, LA)
 - Flannery O'Connor (Milledgeville, GA)
 - Erskine Caldwell (Moreland, GA)
 - Margaret Mitchell (Atlanta, GA)
 - Pat Conroy (Atlanta, GA)
 - Alice Walker (Putnam County, GA)
 - Robert Penn Warren, *Fugitives & Agrarians* (Nashville, TN)
 - Alex Haley (Henning, TN)
 - Thomas Wolfe (Asheville, NC)
 - Tom Robbins (Blowing Rock NC)
 - Tie-in with Southern Literary Festival
 - Tie-in with key sites
- **“Appalachia Meets the Delta” Architectural Heritage Tour.** A driving tour would be established that focuses on the unique combination of southern architectural styles found in the region. Driving the pastoral landscapes of northeast Mississippi, the tourist will see a distinct transition from Appalachian mountain log homes to Delta cotton plantations. Urban and rural lifestyles will be captured through visits to farmsteads, plantation houses, towns and historic recreated villages like French Camp. The tour would be marketed year-round, with special events coinciding with Spring Pilgrimage. The formalization of a tour that draws on the Hills unique characteristics will help strengthen the marketing of this theme within the region.



- **Mississippi Furniture & Furnishings Show.** The Mississippi Hills is a major furniture producing region and the Furniture Mart is well-established in Tupelo as a bi-annual event attracting wholesale and retail buyers from throughout the country and beyond. In order to strengthen the region's position in this competitive market, there is the opportunity to establish a consumer-oriented show that would showcase local furniture companies and other businesses in the furnishings supply chain. Such an event would help attract visitors to the region and can feature exhibits on the region's furniture-making heritage.
- **Downtown Marketing Strategies.** Downtown Oxford, Columbus, Starkville, Tupelo, New Albany and others are primed and marketed for heritage tourism. However, other cities and smaller towns in the region could benefit from more intensive design improvements and heritage marketing efforts. Holly Springs is one of the larger downtowns in the region, but is less "tourist-ready" than the others. There is a need for developing a downtown marketing strategy for Holly Springs, particularly in relation to Rust College and the other heritage sites in the community. Some smaller communities like Aberdeen and Iuka have been somewhat successful on their own but could benefit from further development and/or marketing of their downtowns. Others, like Macon and Louisville have limited tourist appeal at present but may have potential that needs to be explored and developed.



More concepts are being developed and will be introduced for the charrette process. Overall these concepts are only meant as a starting point for discussion and planning, leading into the charrette. They are generally supported by the market assessment and other work that has been completed to-date, that suggest these projects and programs would be economically viable and sustainable. Further research will develop more detailed input and approaches for implementation where appropriate.

APPENDIX G

Categorical Exclusion Report

APPENDIX G: CATEGORICAL EXCLUSION REPORT

Mississippi Hills National Heritage Area Management Plan

Draft – 9/1/13

Background

An important requirement for creating a National Heritage Area (NHA) Management Plan is to follow all applicable federal environmental policies. The most significant of such policies is the 1970 National Environmental Policy Act (NEPA). The Council on Environmental Quality (CEQ) was established by Congress to be responsible for implementing NEPA. In turn, the CEQ produced the DO-12 handbook (Director's Order) to guide parties in meeting NEPA requirements.

During the first few decades of the National Park Service's NHA program, NHA's followed Environmental Assessment (EA) or Environmental Impact Statement (EIS) requirements, although the requirement for an EIS rarely occurred, if ever. Thus, the vast majority of NHAs, if not all, followed the path of the EA when addressing NEPA within their management planning processes. Over the years, many individuals intimately involved with federal environmental review questioned the need for applying EAs to NHA Management Plans. In fact, a document entitled "Interim Guidance - Director's Order 12 Categorical Exclusions" was created to replace Sections 3.3 and 3.4. On March 22, 2011, the NPS's Office of the Solicitor and Environmental Quality Division (EQD) determined that Categorical Exclusion (CE) 3.3-R applied to the Gullah Geechee National Heritage Corridor's Management Plan because the actions described in the plan would not result in immediate ground disturbance or measureable environmental impacts.*

* Memorandum from Martha Raymond (National Coordinator for Heritage Areas NPS) to the National Heritage Area Coordinators and the NHA NEPA Workgroup dated April 1, 2011.

The NPS has two lists of categorically excluded actions – Sections 3.3 and 3.4. Section 3.3 requires no formal documentation. If a proposed action is on this list, no NEPA-related documentation is required and no evidence of scoping is required. In the vast majority of cases, the actions in Section 3.3 have no potential for an environmental impact. As noted above, the Section 3.3 list has been replaced by the Interim Guidance document. The DO-12 handbook suggests checking the list of exceptions contained in Section 3.5 before excluding an action listed in Section 3.3.

The CE's Application to the MHNHA

As noted above, the "Interim Guidance - Director's Order 12 Categorical Exclusions" was created to replace Sections 3.3 and 3.4. Projects meeting the 3.3 criteria are not required to provide documentation, while those meeting the 3.4 criteria are required to provide documentation. Because a comparable project – the Management Plan for the Gulla Geechee Cultural Heritage Corridor – was determined to meet the requirements of Section 3.3, that same reasoning is being applied to the Mississippi Hills National Heritage Area (MHNHA).

Section 3.3 Considerations

Specifically, Section 3.3 reads as follows:

3.3 CEs for Which No Formal Documentation is Necessary

The following list shows actions that usually have no potential for impact to the human environment, and that therefore are not routinely subject to NEPA review and documentation. The list is included here to reinforce the idea that many routine federal government actions do not need further NEPA analysis. Under normal circumstances, no NEPA-related documentation (including an Environmental Screening Form (ESF)) is required to perform the actions on this list. However, if the criteria in section 3.5 apply, or if for any other reason you believe the action listed below may have an impact on the human environment, procedures described in DO-12 section 3.2 apply. Some of the following actions (A through I) are the same as the departmental CEs published as 43 CFR § 46.210. Others (J through Y) have been added by NPS (516 DM 12).

- A. Personnel actions and investigations and personnel services contracts.*
- B. Internal organizational changes and facility and bureau reductions and closings.*
- C. Routine financial transactions including such things as salaries and expenses, procurement contracts (e.g., in accordance with applicable procedures and Executive Orders for sustainable or green procurement), guarantees, financial assistance, income transfers, audits, fees, bonds, and royalties.*
- D. Departmental legal activities including, but not limited to, such things as arrests, investigations, patents, claims, and legal opinions. This does not include bringing judicial or administrative civil or criminal enforcement actions which are outside the scope of NEPA in accordance with 40 CFR 1508.18(a).2*
- E. Routine and continuing government business, including such things as supervision, administration, operations, maintenance, renovations, and replacement activities having limited context and intensity (e.g., limited size and magnitude or short-term effects). Guidance: Examples of day-to-day maintenance and operations include trash removal, changing light bulbs, sweeping parking lots, cleaning restrooms, fixing machinery, snow removal, and small-scale building repairs that do not involve modifications of the building's footprint, etc.*
- F. Management, formulation, allocation, transfer, and reprogramming of the Department's budget at all levels. (This does not exclude the preparation of environmental documents for proposals included in the budget when otherwise required.)*
- G. Legislative proposals of an administrative or technical nature (including such things as changes in authorizations for appropriations and minor boundary changes and land title transactions) or having primarily economic, social, individual, or institutional effects; and comments and reports on referrals of legislative proposals. Guidance: This CE does not apply to legislative proposals that would result in changes in land use, or for legislative proposals for wilderness designation or wild and scenic river designation.*

- H. Policies, directives, regulations, and guidelines: that are of an administrative, financial, legal, technical, or procedural nature; or whose environmental effects are too broad, speculative, or conjectural to lend themselves to meaningful analysis and will later be subject to the NEPA process, either collectively or case-by-case.*
- I. Activities which are educational, informational, advisory, or consultative to other agencies, public and private entities, visitors, individuals, or the general public.*
- J. Land and boundary surveys. Guidance: Be sure to consider impacts resulting from survey activities, such as vegetation removal and ground disturbance before using this CE.*
- K. Preparation and issuance of publications.*
- L. Technical assistance to other Federal, State and local agencies or the general public.*
- M. Routine reports required by law or regulation.*
- N. Issuance of individual hunting and/or fishing licenses in accordance with State and Federal regulations.*
- O. Changes in interpretive and environmental education programs. Guidance: This CE also applies to changes in schedules for interpretive and environmental education programs and services.*
- P. Plans, including priorities, justifications and strategies, for non-manipulative research, monitoring, inventorying and information gathering. Guidance: This CE also applies to agreements between NPS offices and other federal and state agencies for plans and studies.*
- Q. Authorization, funding or approval for the preparation of Statewide Comprehensive Outdoor Recreation Plans. Guidance: This CE applies to equivalent plans such as comprehensive statewide historic preservation plans.*
- R. Adoption or approval of surveys, studies, reports, plans and similar documents which will result in recommendations or proposed actions which would cause no or only minimal environmental impact. Guidance: In the case of a plan that may direct NPS action, use of this CE may not be appropriate and additional analysis may be needed before implementing recommendations.*
- S. Sanitary facilities operation. Guidance: Examples include changes to operating hours, replacing treatment chemicals, and upgrades to equipment to incorporate new technologies that do not result in changes to building footprints or scale of the structure or service, etc.*
- T. Development of standards for, and identification, nomination, certification and determination of eligibility of properties for listing in the National Register of Historic*

Places and the National Historic Landmark and National Natural Landmark Programs. Guidance: This CE also applies to biosphere reserves.

- U. Statements for management, outlines of planning requirements and task directives for plans and studies.*
- V. Preparation of internal reports, plans, studies and other documents containing recommendations for action which NPS develops preliminary to the process of preparing a specific Service proposal or set of alternatives for decision. Guidance: This CE applies to foundation documents and other equivalent preliminary informational documents.*
- W. Documents which interpret existing mineral management regulations and policies, and do not recommend action.*
- X. Stabilization by planting native plant species in disturbed areas. Guidance: This CE could apply to other minor revegetation actions such as replanting of native species in a small area after removal of exotic species. Remember, compliance with Section 106 of the National Historic Preservation Act must be completed prior to any ground disturbance.*
- Y. Day-to-day resource management and research activities. Guidance: This CE applies to cultural and natural resource management and research activities that have no impact on the human environment and that are not otherwise listed in section 3.4.*

Of the numerous considerations listed above for Section 3.3, item R is the one referenced for why the Gulla Geechee National Heritage Corridor was granted a CE. That item reads as follows: “Adoption or approval of surveys, studies, reports, plans and similar documents which will result in recommendations or proposed actions which would cause no or only minimal environmental impact. Guidance: In the case of a plan that may direct NPS action, use of this CE may not be appropriate and additional analysis may be needed before implementing recommendations.” With regard to the “guidance” component of this item, not only does it state that the CE “may not” be appropriate, leaving the possibility that it may be appropriate, but the MHNHA’s Management Plan is intended primarily to give direction to the actions of the local coordinating entity rather than the actions of the NPS.

Another criterion that appears to equally relate to this project is item I – “Activities which are educational, informational, advisory, or consultative to other agencies, public and private entities, visitors, individuals, or the general public.” The MHNHA Management Plan is clearly educational, informational, advisory and consultative. Likewise, the plan’s intended audience includes other agencies, public and private entities, visitors, individuals, and the general public.

Yet another criterion that might apply to this project is item P – “Plans, including priorities, justifications and strategies, for non-manipulative research, monitoring, inventorying and information gathering.”

Section 3.5 Considerations

This section addresses “Exceptions to CEs Due To Extraordinary Circumstances.” In general, those exceptions listed as items A through L all relate to findings that the proposed action will likely result in a significant impact to natural and cultural resources. Based upon public scoping meetings and an inventory and analysis of resources as part of this plan’s Background Study, this section does not appear to apply to the MHNHA Management Plan.

Conclusions

The determination of whether a CE is appropriate for this Management Plan, as opposed to requiring an EA or an even more rigorous EIS, is being based upon three key input factors:

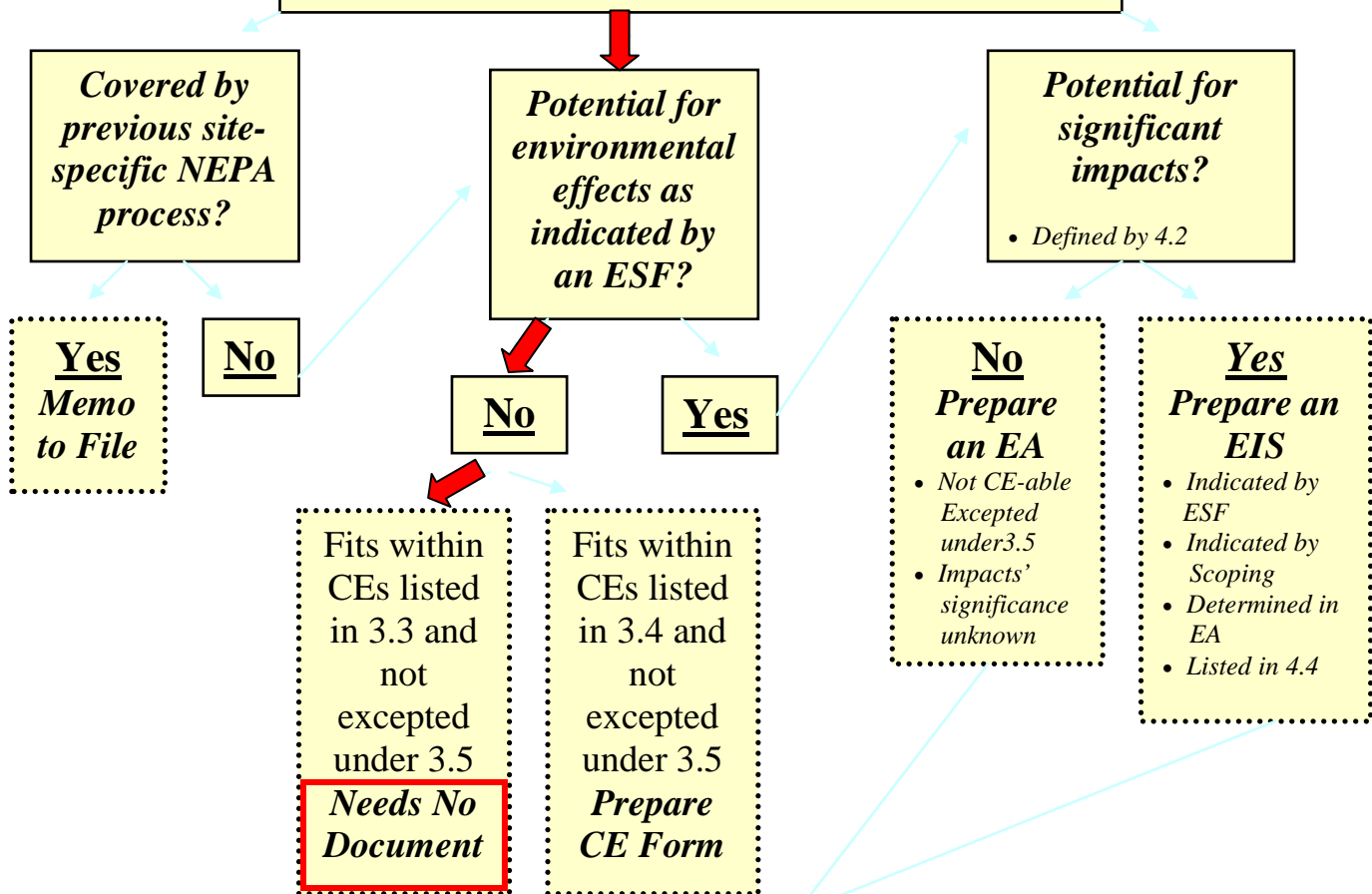
- 1) The *inventory and analysis of natural and cultural resources* contained within the Background Study component of the draft Management Plan for the MHNHA;
- 2) The *public input* solicited through the various scoping meetings that were conducted as part of the planning process and documented in the Public Involvement Strategy of the draft Management Plan for the MHNHA; and
- 3) The *foundation statement* within the Background Study component of the draft Management Plan that predicts what the ultimate MHNHA might become.

A consideration and contrasting of these three inputs, in light of the CE requirements, as well as recent precedents such as the Gulla Geechee National Heritage Corridor, underscores the conclusion that no significant impacts on natural, cultural or social resources are anticipated from the future implementation of the MHNHA Management Plan. Consequently, a CE per Section 3.3 should apply to this project.

Step 1: Identify Purpose, Need, and Objectives for Taking Action

Step 2: Conduct Internal Scoping; Develop Proposal; Review Environmental Screening Form

Step 3: Determine the Appropriate Pathway



Step 4: Refine Alternatives; Conduct Public Involvement

Step 5 and 6: Bound Analysis; Describe Affected Environment

Step 7 and 8: Analyze and Revise Alternatives

Step 9 and 10: Conduct Document Analysis; Allow Public Review and Comment; Prepare Decision Document (FONSI or ROD)

APPENDIX H

Preparers and Participants

APPENDIX H: PREPARERS & PARTICIPANTS

Mississippi Hills National Heritage Area Management Plan

Participants in this NHA management planning process have been numerous and diverse. Their participation is documented in Appendix C (Stakeholders List & Meetings Information) of this Background Report. In addition to those participants, key parties involved in the direct creation of this management plan include the Planning Team Consultants, the Mississippi Hills Heritage Area Alliance (MHHA) and the National Park Service (NPS). Below are those key participants.

Planning Team Consultants

Philip Walker, AICP – Principal / Project Manager: The Walker Collaborative - Nashville, TN

Phil Walker has over twenty-five years of professional planning experience. His public sector experience consists of serving as the Executive Director of the Pensacola (Florida) Downtown Improvement Board, City Planning Director for Natchez, Mississippi, and Interim Director of the Two Rivers Company – Clarksville, Tennessee’s downtown and riverfront revitalization entity. Phil’s private sector experience includes Associate positions with Hintz-Nelessen Associates (HNA) in Princeton, New Jersey, and Christopher Chadbourne and Associates (CCA) in Cambridge, Massachusetts. He served as the Principal of Community Planning & Research, Inc. based in Nashville, Tennessee for four years, and then served as the Director of Planning for the Nashville office of Looney Ricks Kiss Architects (LRK). He established The Walker Collaborative in 2002. Phil has consulted to the National Trust for Historic Preservation and several local Main Street programs, and he has been a speaker at numerous national and regional conferences, including those of the American Planning Association, the National Main Street Center and the National Trust for Historic Preservation. Phil has been a member of the American Institute of Certified Planners (AICP) since 1989, and he is trained and certified by the National Charrette Institute (NCI) to lead public planning charrettes. He holds a bachelor’s degree in Historic Preservation from Middle Tennessee State University, a master’s degree in Urban and Regional Planning from the University of Florida, and a master’s degree in Real Estate Development from Harvard University.

Keith Covington, AIA, CNU - Principal: Third Coast Design Studio – Nashville, TN

Keith Covington is a registered architect who brings over fifteen years of professional experience in architecture, urban design, and planning to Third Coast Design Studio. Keith earned his Bachelor of Architecture at the University of Tennessee and his Masters of Architecture in New Urbanism at Andres Duany and Elizabeth Plater-Zyberk’s program through the University of Miami in Coral Gables. While he is an accomplished architect whose work has been published in Southern Living Magazine, Keith’s primary focus is to create walkable environments that balance the needs of the pedestrian with those of the automobile. He has lectured extensively on this subject across the country. Prior to forming Third Coast Design Studio, Keith was the director of the Metro Nashville Planning

Department's Urban Design Studio where he helped reinvent Nashville's approach to planning and coding.

Lee Jones, ASLA, CNU - Principal: Third Coast Design Studio – Nashville, TN

Lee Jones brings ten years of professional experience in urban design, planning, and landscape design to Third Coast Design Studio. Prior to receiving a degree in Landscape Architecture at Mississippi State University, Lee initially earned a BA in Political Science at the University of Mississippi, providing him with a versatile set of skills to think critically about public policies and their consequences. Prior to joining Third Coast Design Studio in late 2006, Lee spent five years with the Metro Nashville Planning Department serving as director of the department's Urban Design Studio in his final year. While with the Planning Department, Lee served as Metro Nashville's Greenways Coordinator, drafted amendments to Metro's Zoning Code, and solved urban design problems within the city through leading public-participatory design charrettes and writing form-based codes.

Randall Gross – Economist & Planner/ President: Randall Gross/Development Economics – Washington, DC

Randall Gross has over twenty-five years of experience providing strategic economic and development consulting services for local, regional and national governments; private companies; and non-profit agencies. He has worked on nearly 450 projects to enhance their capacity for sustainable community and economic development, citizen participation, asset management, and policy formation. Randall has consulted on projects in 29 states and five foreign countries. Randall Gross provides tourism economics and strategic planning services for a variety of public and private sector clients. Much of his work in this area involves testing the market and financial feasibility of tourism projects, and creating overall tourism development, marketing and management strategies as a tool for local economic development. He projects the market potential, as well as the financial return for tourism projects, and he does financial planning. Randall helps communities establish the approach which maximizes the potential for job and income creation, fiscal benefits, and operating feasibility for tourism projects, while minimizing risk carried by the public sector.

Mississippi Hills Heritage Area Alliance (MHHA)

Need MHHA to provide info. they would like included here

National Park Service (NPS)

Need NPS to provide info. they would like included here