



Situational Analysis Report

April 2021

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TOC

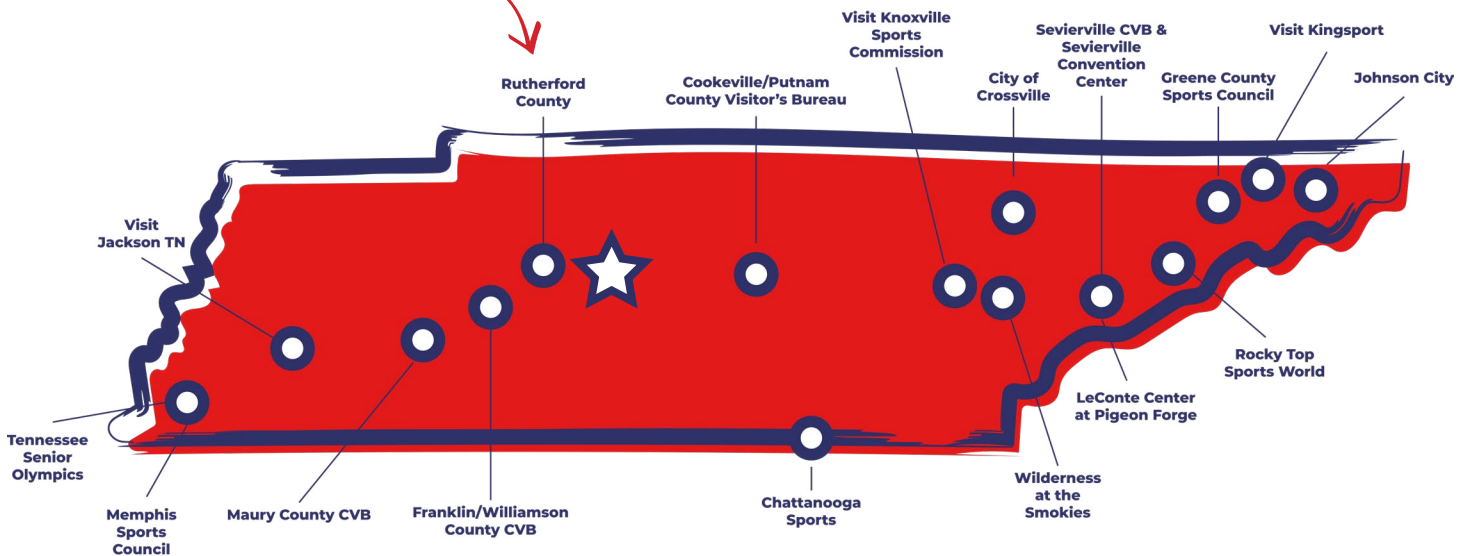
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Play TN Sports Partnership History and Overview

Founded **2015**

Partner Organizations



Partner Retention

- Morristown and Coffee County were previous members
- Note: Nashville is not a member but Play TN Sports would like them on board. This is a common dynamic among state sports tourism entities with large metro areas.

Officers



Chairman
Frank Lett
Visit Kingsport



Vice Chairman
Tony Funderburg
Sevierville Chamber of Commerce/CVB



Treasurer
Brant Donlon
Chattanooga Sports



Secretary
Parker Medley
Visit Knoxville



Past Chair
Chad Culver
Visit Knoxville

Mission

The Play TN Sports Association, Inc. is a non-profit corporation whose purpose is to **grow, promote and enhance the general welfare of the sports tourism** industry within Tennessee.



Play TN Sports Focal Areas



**Share
sports
event RFPs**



**Attend industry
conferences and
tradeshows**



**Conduct
joint
marketing**

Project Overview



Phase 1

Collect data



Phase 2

Benchmark Report



Phase 3

Competitive Advantage

Data Collection

Started December 1, 2020 and concluded mid-February 2021.

- Partner economic impact template
- Addition partner data
- Qualitative partner questionnaires
- Qualitative partner interviews
- Qualitative leader interviews
- Primary data aggregation
- Secondary data aggregation

For Play TN Sports partner data collection contribution, see Appendix A.

Sports Tourism Context

Size & Scope of the Industry

Travel for sporting events dates to ancient times, but only in the last 30 years has a concerted effort been made to proactively attract and host sporting events in a destination.

Sports ETA founded by 13 communities 29 years ago.



Now consists of 2500+ representatives:

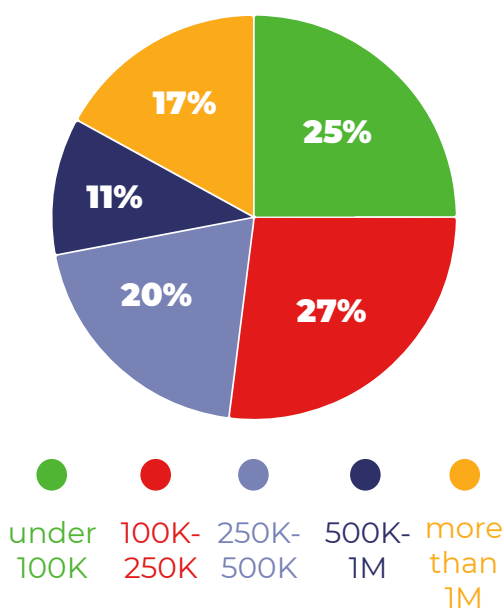
- More than 500 destination members
- More than 200 event rights holders (examples: Youth sports tournaments to USOPC to NCAA Championships to World Cup)
- More than 200 industry partners (examples: software/technology, hotel brands, third party housing agencies, suppliers)
- Growing youth/amateur sport complexes (examples: Grand Park, SFA/SFM, etc.)

Destination Structures

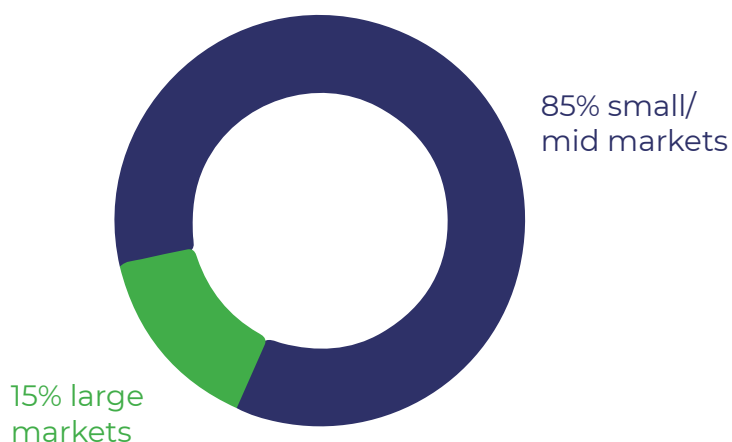
Of destinations, 80% are within a DMO, 15% are Stand Alone, 5% associated with another organization (State entity, Chamber, Private, etc.) (Stoll, et al., 2020).

Destination Analytics

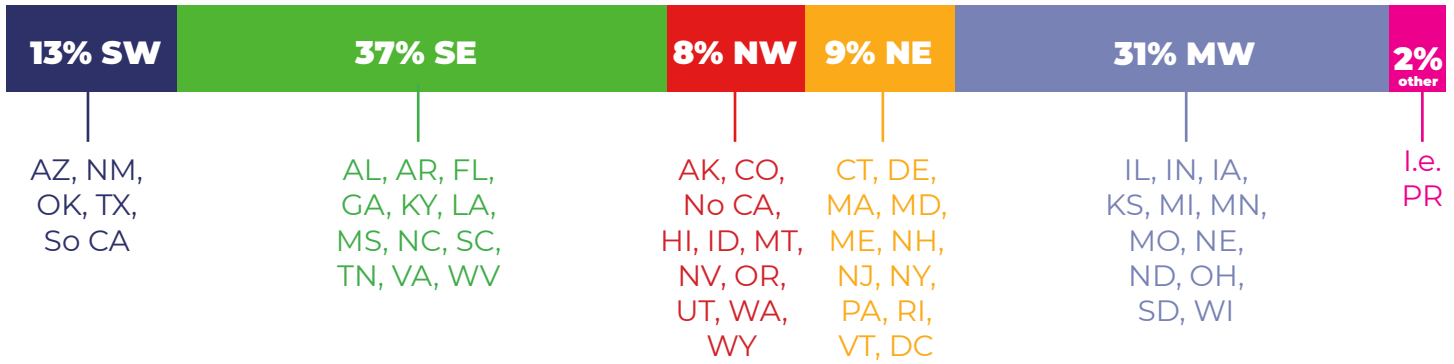
Breakdown by Population:



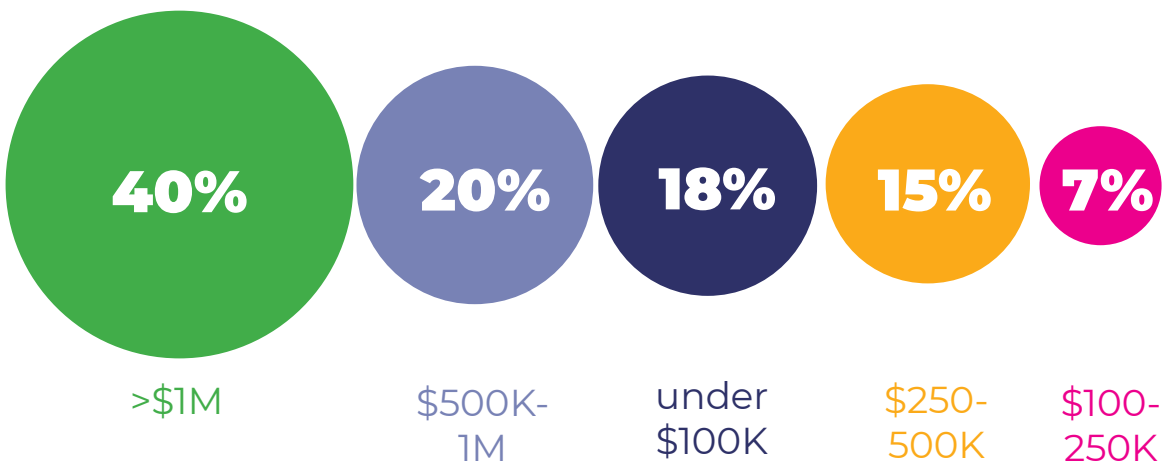
Breakdown by Market Size:



Breakdown by Region:



Breakdown by Budget:



Destination Analytics



Business Transaction Key Take-Away:

Sports tourism success is predicated on the unique asset portfolio of each destination, like leisure travel. It is not solely square convention and meetings space. The specific makeup of each destination – or state's – asset portfolio and how it is leveraged is the crucial factor in success of the initiative.

Pre and Post Pandemic

Pre-Pandemic

Growth YOY for last 10+ years (Sports ETA)

Sports-related travel spending and annual growth

Amounts in billions of nominal dollars and year-over-year percentage growth



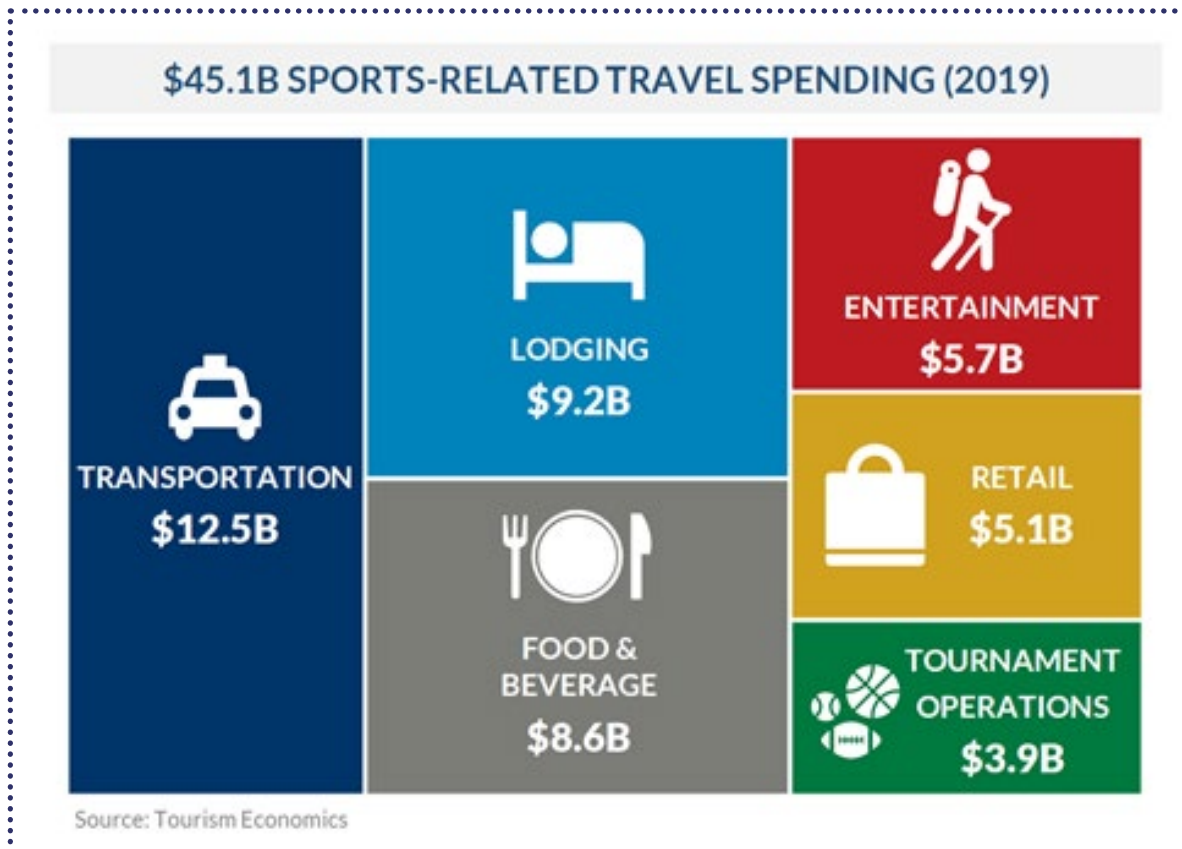
Source: Sports ETA, Longwoods International, US Travel Association, Tourism Economics



2019 Sports ETA State of the Industry Report:

The most comprehensive report for sport-related travel industry ever (study designed by *Stoll Strategies*, conducted in partnership with *Tourism Economics*)

Report Highlights*:



Total sports travelers and sports-related travel spending

Amounts in millions of sports travelers and millions of nominal dollars

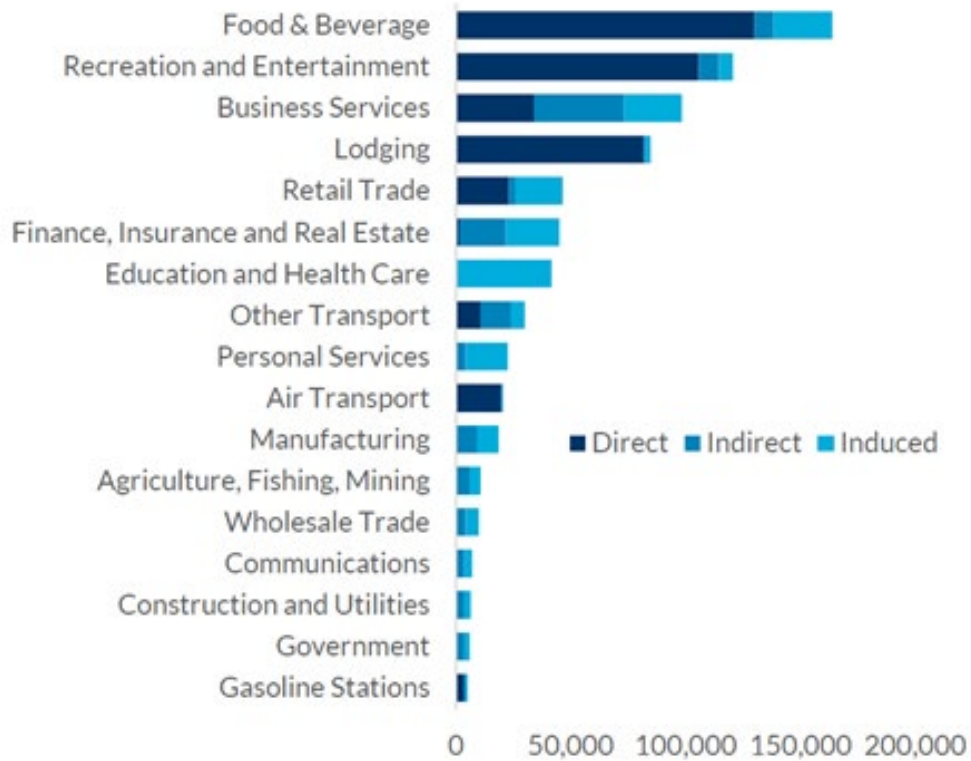
	2015	2016	2017	2018	2019
Total travelers	169.3	171.4	174.4	175.9	179.3
Day	79.6	80.6	82.5	80.9	83.0
Overnight	89.6	90.7	91.9	95.0	96.4
Total traveler spending	\$35,217	\$35,817	\$37,726	\$39,100	\$41,174
Day	\$5,472	\$5,700	\$6,138	\$6,137	\$6,574
Overnight	\$29,745	\$30,118	\$31,587	\$32,963	\$34,600
Per traveler spending	\$208	\$209	\$216	\$222	\$230
Day	\$69	\$71	\$74	\$76	\$79
Overnight	\$332	\$332	\$344	\$347	\$359

Note: event organizer and venue spending on tournament operations is excluded from above table. In 2019, this amounted to \$3.9 billion.

Source: Tourism Economics

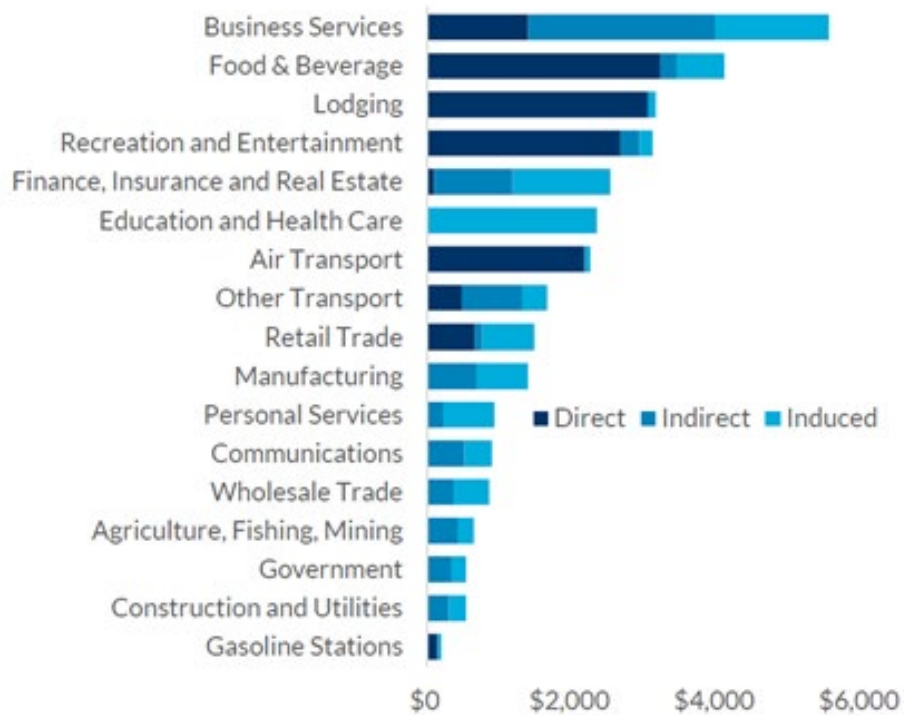


Job impacts by industry – 2019



Source: Tourism Economics

Labor income impacts by industry (\$ millions) - 2019



Source: Tourism Economics



Tax impacts (\$ millions) – 2019

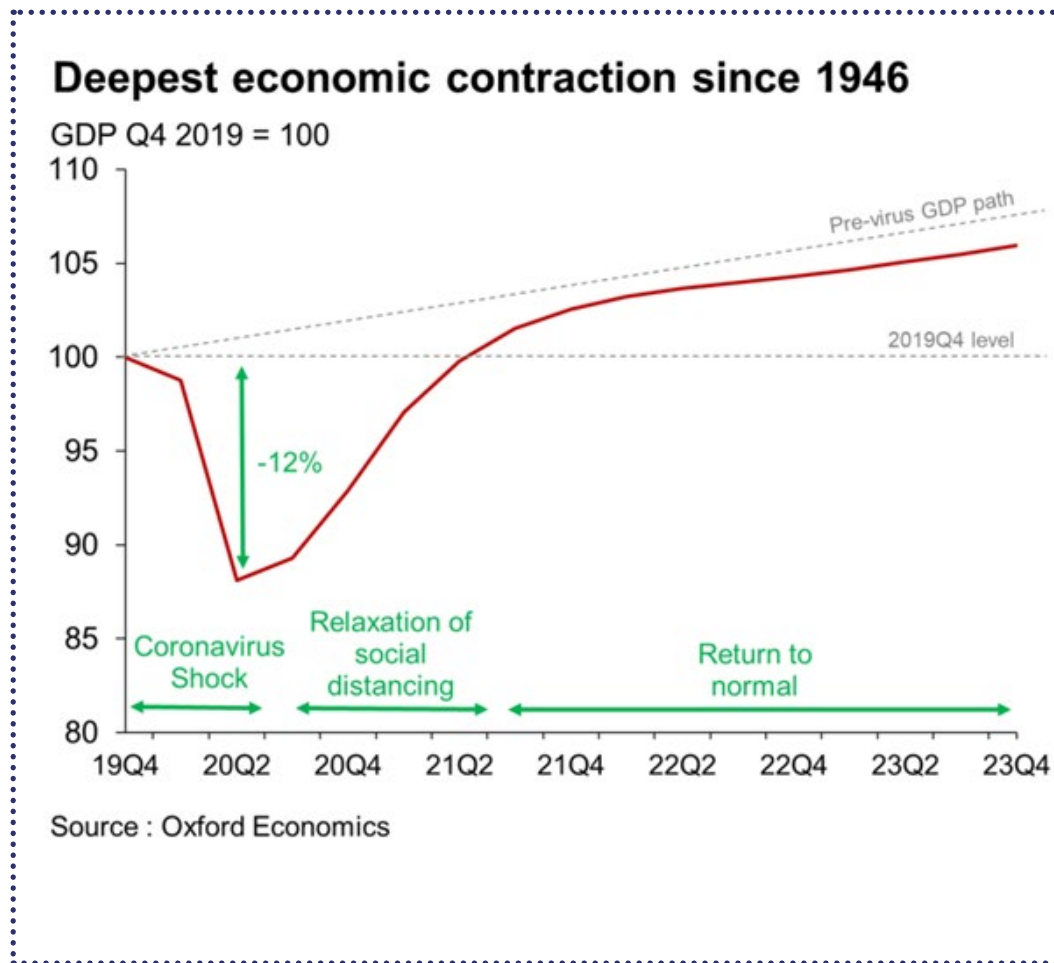
	Direct	Indirect / Induced	Total
Total Tax Revenues	\$7,371	\$7,196	\$14,568
Federal	\$3,361	\$4,429	\$7,790
Personal Income	\$1,124	\$1,494	\$2,618
Corporate	\$366	\$737	\$1,103
Indirect Business	\$352	\$263	\$615
Social Insurance	\$1,519	\$1,935	\$3,454
State and Local	\$4,010	\$2,767	\$6,778
Sales	\$1,383	\$1,033	\$2,416
Bed Tax	\$703	\$0	\$703
Personal Income	\$280	\$372	\$651
Corporate	\$57	\$115	\$172
Social Insurance	\$25	\$32	\$57
Excise and Fees	\$320	\$289	\$610
Property	\$1,242	\$927	\$2,169

Source: Tourism Economics



Pandemic Losses

- 2020 = Loss of \$20B in sports-related direct spending (Tourism Economics)



Post-Pandemic Recovery

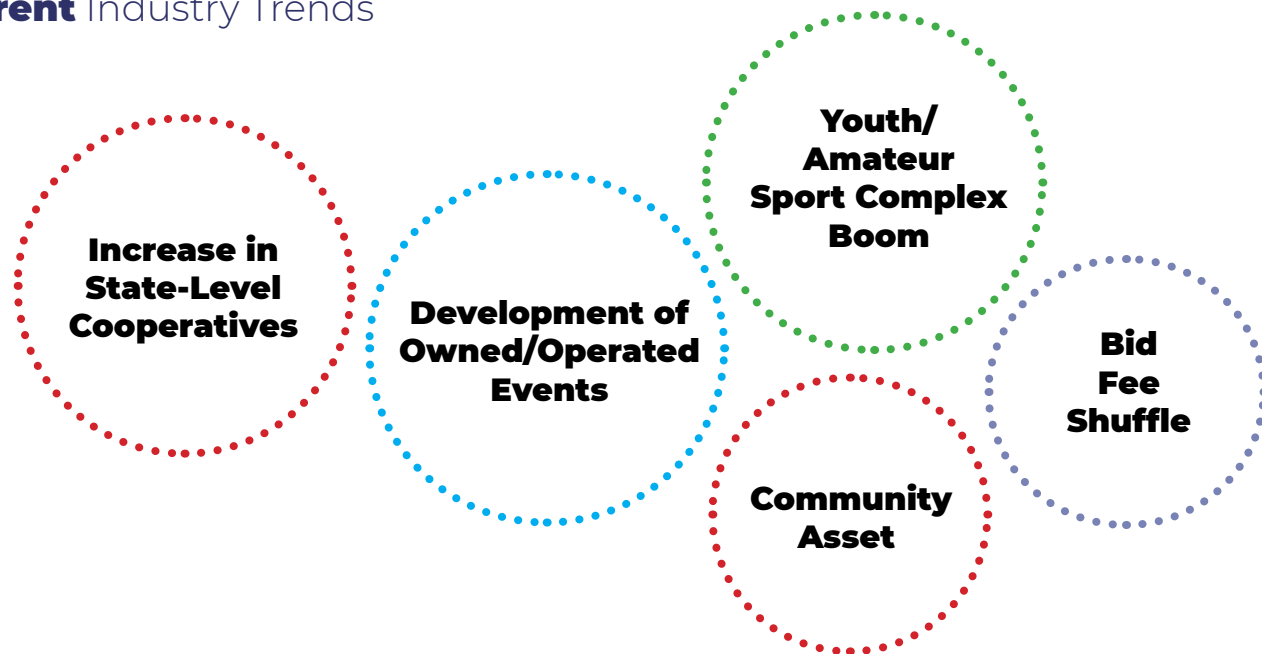
- Loosening of restrictions changing day-by-day
- Sports and leisure leading due to pent-up demand of both sport and tourism

Longwood's International [Covid Sentiment](#) waves showing trend toward travel actualization

- Changes to delivery – Good and bad
 - [Project Play](#) near 30% youth not interested in sport
 - Increase focus on recreation play/regional sport – Changes in access sport
 - [Project Play](#) Need for socialization/community/mental health
- Creative use of sports assets



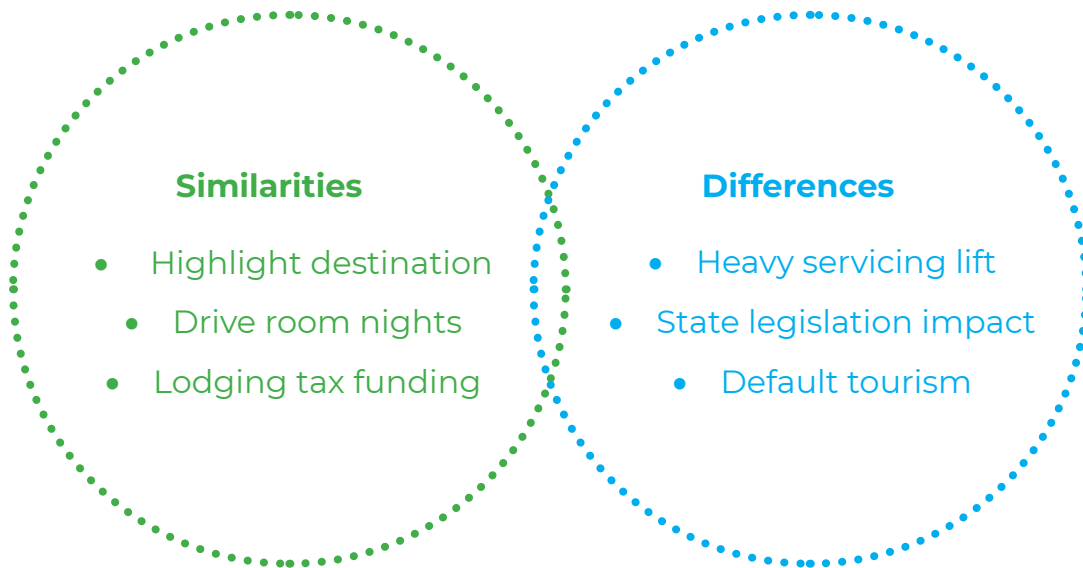
Current Industry Trends



Morristown Landing - 100k square foot venue



Similarities and differences to other segments of tourism:



Sports Tourism Segment Benefits

Community Asset Leverage:

- ✓ Economic
- ✓ Branding
- ✓ Intangible
- ✓ Leverage



Industry Size and Scope Key Take-Away:

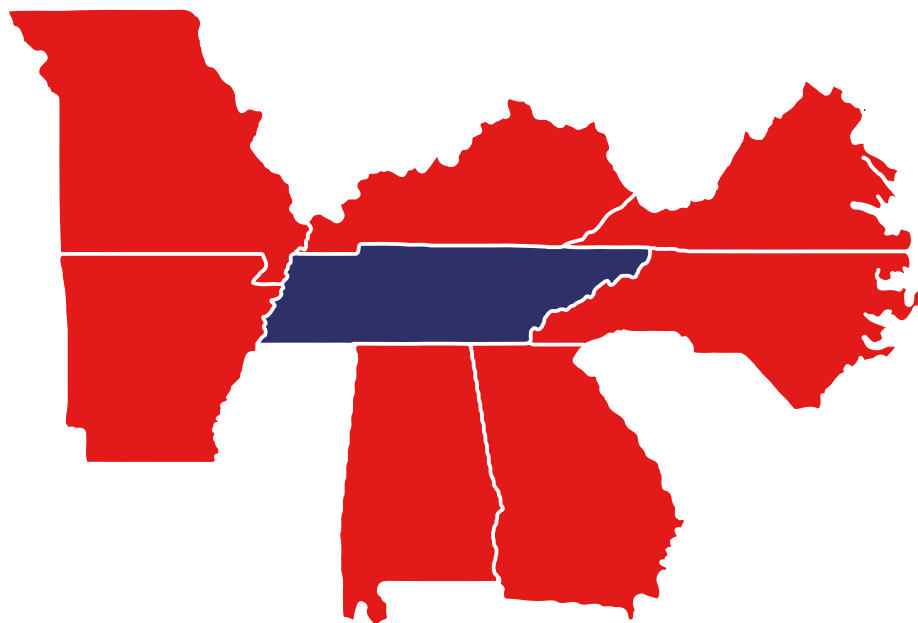
Sports tourism was experiencing unprecedented YOY growth prior to the pandemic with minimal innovation to the business transaction. The pandemic dealt a devastating blow to the industry. However, blessings in disguise emerged as the industry is now shifting toward a needed expansion in its value proposition through additional metric measurement, an increased focus on technology and process efficiency, and re-imagined sport delivery mechanisms.



State Sports Tourism Entity Competitive Sets

Border states – KY, VA, NC, GA, AL, MS, AR, MO*

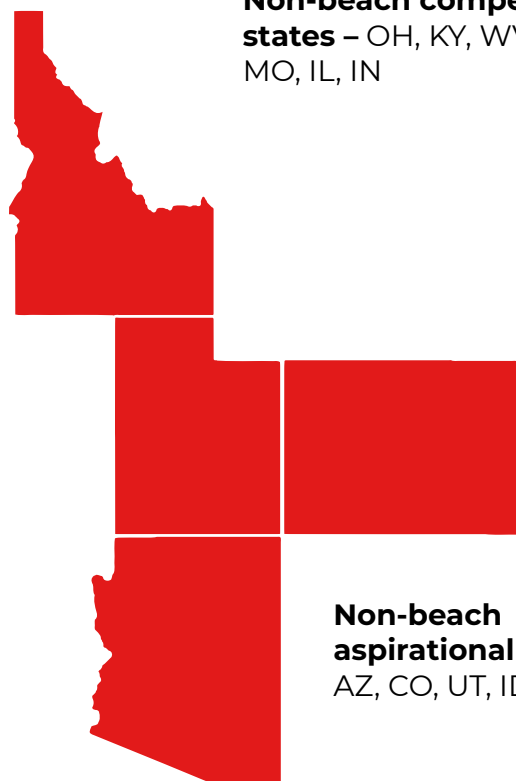
**Mississippi does not have a state sports tourism association*



Non-beach competitive states – OH, KY, WV, AR, MO, IL, IN



Non-beach aspirational states – AZ, CO, UT, ID



State Association Structures, Funding & Membership Structures

- 46.2% (12) operate as non-profits.
- 28.5% (10) are affiliated with a government agency.

Funding Sources

- 69.2% (18) of state associations collect member or partner dues (flat fee 55%, tier system 30.8%)
 - **Play TN Sports:** Five tiers: \$500, \$750, \$1,000, \$1,250, and \$2,000.
 - Average Annual Membership Fee for 2019 was \$2,861.
- 73.1% (19) received some type of state funds in 2020 (down from 92.3% in 2019)
 - 12 state associations (52.2%) receive direct funding from their state.
 - 10 state associations (41.7%) receive grant funds for sport tourism from their state with varying parameters.
 - Average state funding (without FL and UT) was \$113,840.
 - Play TN Sports receives \$35,000 (69.3% below average)
- Seven organizations (26.9%) are funded solely by their state.
- Four organizations (15.4%) operate using only member dues/partner fees.

Play TN Sports Funding Comparison

- **Overall** (all 26 state associations)
 - State Funding – Play TN Sports ranked 17th
 - Annual State Tourism Association Budget – Play TN Sports Ranked 13th
 - Average 2019 Base Budget (without outliers FL and UT) was \$163,912
 - Play TN Sports's base budget for 2019 was \$90,000 (45.1% below average)
- Border State Competitors (See Appendix B)
 - State Funding – Play TN Sports ranked 5th (out of 8)
 - Play TN Sports receives \$35,000 (8.8% below border state average)
 - Annual State Tourism Association Budget – Play TN Sports Ranked 3rd (out of 8)
 - Play TN Sports's annual budget of \$90,000 is 12.7% higher than the average border state competitor)
- Non-Beach Competitors - (See Appendix C)
 - Play TN Sports ranks 5th (out of 6) in state funding.
 - Play TN Sports receives \$35,000 (41.2% below non-beach average)



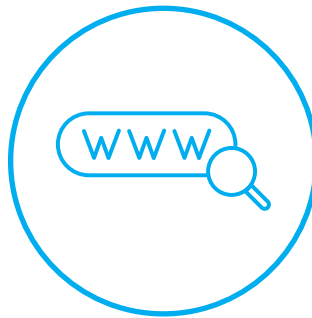
- Play TN Sports ranks 3rd (out of 6) for annual state association budget.
 - Play TN Sports's annual budget of \$90,000 (4.5% higher than the average non-beach competitor)

Membership

- 80.8% (21) of the 26 state sport tourism associations are membership-based organizations in some capacity.
- Benefits of membership vary but often include one or more of the following:



Trade shows



Online Presence



Fee Assistance



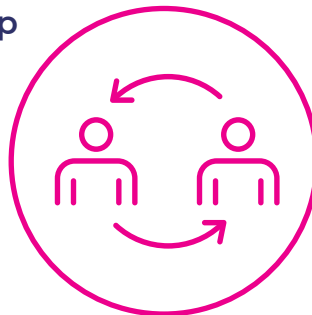
Association
Membership



Sales missions



Grant funding



Group meetings



Partnership
development



Advertising/promo



Voting



Asset Diversity Analysis

Natural assets

- Tennessee has over 60,000 stream miles and over 540,000 lake acres.
 - The Tennessee Wildlife Resources Agency (TWRA) stocks more than 8 million fish per year into state reservoirs and 18 TWRA-managed fishing lakes.
 - 42 of the state's 56 state parks allow fishing and 26 allow recreational boating.
- According to the 2019 Tennessee Boating Incident Statistical Report, there were over 249,000 registered vessels in the state.
- Tennessee has 85 state natural areas of which 20 (23.5%) are classified as Class I (scenic/recreational).
- There are over 100 wildlife management areas (WMAs) and refuges across Tennessee managed by the TWRA. Varying in size from 53 to 625,000 acres, all WMAs are available to the public for various outdoor activities.
- There are over 1,000 miles of trails within Tennessee's 56 State Parks.
- Tennessee State Parks hosts the Bicycle Ride Across Tennessee bike riding tour. This annual event is a week-long excursion through a different part of the state each year.
- The Tennessee Golf Trail consists of nine courses (three Jack Nicklaus-designed "Bear Trace" courses and six traditional courses) located at Tennessee State Parks.
- **Kingsport** is home to Bays Mountain, the nation's largest municipally owned park. A 3,500-acre nature preserve with 22 miles of hiking and biking trails.



Man-made assets

- **Rocky Top Sports World** was ranked #9 on Sports Planning Guide's "Top 10 Southern Indoor Sports Facilities for 2018."
- The Mid-South Fairgrounds in **Memphis** has been rebranded as Liberty Park, which will be transformed into a multiuse area anchored by a \$40 million, 227,000-square-foot youth sports complex and a 120-room hotel. The complex will include indoor basketball and volleyball courts and be able to accommodate other sports such as wrestling, gymnastics, and cheerleading. A cafe and concessions area, outdoor turf fields and a playground also are part of the design plans.
- The Ford Ice Center in **Williamson County/Franklin** is home to the Scott Hamilton Skating Academy and features two NHL size rinks. It hosts numerous adult hockey leagues, youth programs/camps, the Predators development program, and various tournaments.
- The National Archery in the Schools Program supported by the Tennessee Wildlife Resources Agency offers archery programs across the nation and the state of Tennessee. Several schools across Williamson County have



archery programs and **Franklin** has an archery range located adjacent to the Ag Expo Park.

- The Ridley Sports Complex is a modern, multi-purpose sports facility located on the outskirts of Columbia (**Maury County**). It includes 10 softball fields, 9 rectangular fields and accommodates tournament play for all types of sports including: soccer, football, lacrosse, rugby, softball, baseball, and ultimate.

- According to the National Golf Foundation (2020), Tennessee has 274 golf courses (23rd in the U.S.) and ranks 40th for golfers per capita

- Non-Play TN partner Morristown constructing new indoor venue, Morristown Landing

“The Ag Expo Park is a part of the fabric of the community, and we are blessed to have it. This activity [archery] will grow, and it’s a good example of how the county and the state work together to provide a service for the people of Williamson County.”
– **Williamson County Mayor Rogers Anderson**

Tennessee Legacy Assets



Music City



Gatlinburg



Graceland



Jack Daniels

and many more...



Competitive Analysis Key Take-Away

Play TN Sports is sitting in solid position compared to the 25 other official state associations; however, the playing field is quickly shifting as states realize the value of sport highlighted by the pandemic. Expect swift shifts in these competitive advantages as recovery mounts. Due to the success of Play TN Sports with its existing resources, despite not having full economic impact reporting, it is reasonable mark the dollar-for-dollar tax ROI on the investment as significant. **Play TN needs to produce merely \$535,000 in taxable direct spending to break even on state funding.** Given the state’s unique sport and non-sport asset portfolio, the TDTD and Play TN Sports have an immediate and unique opportunity to solidify Tennessee as a leader in the sports tourism industry not only among varying competitive sets (which is certainly achievable), but among industry peers nationwide.

Play TN needs to produce merely \$535,000 in taxable direct spending to break even on state funding.



Play TN Sports

Partner Spotlights

Local, regional, and national work

Play TN Partners have hosted events in conjunction with a sampling of the following organizations:

International (4+)

- Pan-American Sportfishing Federation
- International Federation of Fish Sports Freshwater
- World Triathlon Corporation
- Ironman®

National (33+)

- Minor League Baseball (MiLB)
- National Basketball Association (NBA)
- USA Cycling
- USA Bass
- US Angling
- US Specialty Sports Association (USSSA)
- Bass Anglers Sportsman Society
- Professional Disc Golf Association (PDGA)
- USA Kayak Fishing
- American Motorcyclist Association (AMA)
- Professional Golfers' Association of America (PGA)
- United States Bowling Congress (USBC)
- United States Golf Association (USGA)
- World Sports League
- USA Bass Fishing
- USA Gymnastics



- USA Boxing
- USA Swimming
- USA Track and Field
- Varsity Spirit
- Amateur Athletic Union (AAU)
- National Collegiate Athletic Association (NCAA)
- National Association of Intercollegiate Athletics (NAIA)
- National Junior College Athletic Association (NJCAA)
- National Softball Association
- International Senior Softball Association
- Kohl's Professional Camps
- Crossfit®
- National Independent Soccer Association (NISA)
- USA Triathlon
- US Masters Swimming
- USA Pickleball
- USA Climbing



Regional/State (6+)

- Tennessee Senior Olympics
- Tennessee Secondary School Athletic Association
- PGA – Tennessee Section
- United States Tennis Association (USTA) – Southern Section
- Tennessee Golf Association
- Stihl Timbersports – Southern Region



Future Projection Key Take-Away

As Tennessee's top industry, tourism is poised to lead the state's pandemic-related economic recovery efforts. Among travel segments, leisure and sport are leading industry re-emergence due to pent-up demand and accessibility to open spaces. The diversity of leisure and sport assets in Tennessee, coupled with its average state and local sales tax rate, positions tourism perfectly in the state's recovery efforts.



Interscholastic Level

Play TN Sports enjoys a strong relationship with the TSSAA and partner destinations host most of the state's high school championship events. These are intra-state competitions. See *Appendix D* for a listing of Play TN Sports' engagement with TSSAA.

Partner Achievements and Accolades

- The **Visit Knoxville Sports Commission** was honored with Sports ETA's 2019 "Sport Tourism Organization of the Year, Population under 500,000" Award.
- The 2019 IRONMAN® Athletes' Choice Awards named **Chattanooga** 4th in Overall Swim Experience & 8th in Overall Host City Experience.
- The city of **Knoxville** was designated the host city for the 2019 National Association of Sports Commissions (now Sports ETA) Sports Event Symposium.
- **Rocky Top Sports World** has received honors in two of the SportsEvents Media Group's 2021 Readers' Choice Awards categories. The 2021 awards mark the fifth year the Gatlinburg, Tennessee sports complex has earned Readers' Choice awards.
 - **Rocky Top Sports World** was voted first place in the "All-Star Multipurpose Sports Venue" category and second place in the "All-Star Sports Venue" category.
- TripAdvisor named **Gatlinburg** as the #1 Trending Destination in the U.S. and #5 in the world for 2021.
- Sports Destination Management's 2019 Champions of Economic Impact in Sport Tourism
 - Honor Roll Champion – TSSAA Spring Fling (**Rutherford County**)
 - Total Economic Impact: \$3.5 million
 - "TSSAA Spring Fling Sports Championship is the only high school athletic organization in the United States to have a seven-sport, Olympic-style spring sport championship tournament for baseball, softball, track and field, team and individual tennis and soccer. It is by far the largest attended youth sports championship event in Tennessee, with 32,000 attendees this year. This event is aggressively bid on by prospective host cities but has remained in Rutherford County since 2006 due to its ever-growing demand to host more visitors."
 - Small Market Champion – Smoky Mountain Cup (**Rocky Top Sports World**)
 - Total Economic Impact: \$7.6 million
 - "The Smoky Mountain Cup continues to grow in popularity each year. It has become a coveted destination for both boys' and girls' high school soccer teams nationwide. Teams now include the tournament as part of their normal schedule; the idea of playing in a tournament of this magnitude at the high school level was once unheard of. From 2018 to 2019, the event posted over \$2.9 million in economic



impact growth. More than 7,500 tourists and spectators attended the Smoky Mountain Cup this year, further driving its success.”

- Small Market Champion – NJCAA’s Division III Baseball World Series (**Greene County**)
 - Total Economic Impact: \$2.4 million
 - “The 2019 NJCAA Division III World Series is one of the largest events that Greene County and its sports council has hosted. Not only did local lodging properties benefit, but also those in the adjoining counties of Washington and Hamblen. The community sees an additional economic boost to local shops, grocery stores and laundromats, as well as an increase in sales tax revenue. One unique aspect of the series is the fact that host families in the community work with participants, forming long-lasting relationships.”
- Small Market Champion – 2019 Bassmaster Classic (**Visit Knoxville Sports Commission**)
 - Total Economic Impact: \$32.2 million
 - “B.A.S.S. saw a record total of 153,809 spectators and tourists (from all 50 states and several countries) for this event, including a crowd of 6,500 who came on Saturday alone to watch take-offs at Volunteer Landing on the Tennessee River. The Visit Knoxville Sports Commission worked with the City of Knoxville and Tennessee Wildlife Resource Agency to enlarge the boat ramps at Ned McWherter Park in time for the competition, an effort that left a lasting positive impact on the quality of life for Knox County residents while expanding the options for visitor enjoyment and additional event recruitment.”
- **Rocky Top Sports World** was named the “Best Indoor and Outdoor Sports Campus – South East USA” (2019 Fitness and Nutrition Award) by Global Health and Pharma.
- **Maury County** is part of the South-Central Tennessee GeoTour that includes 13 counties in South/Middle Tennessee. Geocaching is a free, real-world outdoor treasure hunt. Players try to locate hidden containers, called geocaches, using a smartphone or GPS and can then share their experiences online.

Recent Achievements

Chattanooga

After a last-minute change, Chattanooga is now set to host the NCAA DIII Men’s and Women’s Tennis Championships at the Champions Tennis Club on May 24-30, 2021. The championship was originally scheduled to take place in Claremont, Calif., but is moving due to Covid-19 restrictions. The NCAA chose Chattanooga as the new site, which will have an anticipated \$1.1 million economic impact on Hamilton County.

- The National Independent Soccer Association (NISA) announced that their 2021 spring season would begin with a nine-team tournament held in Chattanooga from April 13th-25th.



Chattanooga was one of 10 U.S. cities/areas featured in the Outdoor Industry's National Recreation Economy Report (2017). It stated "thanks to its redeveloped 13-mile riverfront, Chattanooga gets a huge economic boost from the Head of the Hooch, the world's largest rowing regatta. The 2,100 plus boat race has an annual economic impact of more than \$5.5 million for the city."

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- Chattanooga will host the Clydesdale & Athena National Championships (USA Triathlon) on June 27, 2021.

- The Sunbelt Bakery Ironman 70.3 Chattanooga will be held on May 23, 2021.
- The Little Debbie Ironman Chattanooga will be held on September 26, 2021.
- The NCAA selected Chattanooga as the host city for six championships for soccer, softball and tennis for 2023 through 2026.
 - DII Softball (2023, 2025-26)
 - DII Mens and Womens Soccer (2023-24)
 - DII Mens and Womens Tennis (2026)

Memphis

- The 2021 Women's National Invitational Tournament (WNIT) was held in nearby Collierville on March 26-28.
- The High Point Climbing and Fitness Club in Memphis hosted the 2021 USA Climbing National Team Trials on March 26-30.
- The Ironman 70.3 Memphis sponsored by St. Jude will be held October 2, 2021.

Cookeville/Putnam Co.

- Cookeville is home to native Rich Froning, four-time Reebok CrossFit® "Fittest Man on Earth." His team, Crossfit® Mayhem Freedom are four-time Affiliate Cup champions.
- CNN Story: [How a Small US Town Became Crossfit's Global Mecca](#)



- Sports Planning Guide: [CrossFit® Mayhem Expansion Boosts Tennessee as a Sports Destination](#)
- “Train With Rich” events have become extremely popular.
- The 2020 Mayhem Classic (a Sanctionals™ event) was hosted by Rich Froning.
- Cookeville-Putnam County Visitors' Bureau joined the United States Angling Confederation to announce their hosting of the 2021 U.S. Kayak Open and the 2022 FIPSeD Kayak Fishing World Championship.



- The U.S. Kayak Open is set for Sept. 9-12, 2021 on Center Hill Lake and area rivers.
- The inaugural world championship competition is scheduled to take place in May 2022.

Rocky Top Sports World

- Rocky Top Sports World was awarded hosting privileges for the 2019 and 2020 5th Grade Girls Basketball National Championships by the Amateur Athletic Union of the United States.
- In 2020, Rocky Top Sports World hosted the inaugural Gatlinburg All-American Bowl, a premier post-season event for private and home school football players.

Greene County

- Greeneville will host the NJCAA Division III Baseball World Series in May 2021 (host since 2017).

Knoxville

- 2019 USMS Open Water National Championships

Sports Planning Guide: [First of its Kind Swimming Race From USMS Heads to Knoxville](#)

- Originally run in Baltimore, MD since 2012, the Mid-Atlantic CrossFit® Challenge (MACC) will be held for the first time outside the Metro DC area this year, taking place in Knoxville May 28-30, 2021.
 - The event has grown to include over 720 athletes from more than 222 affiliates and 37 states competing in divisions designed for all skill levels.

Kingsport

- 2019-21 AAU All-American Spring Youth Nationals (Wrestling)
- 2021 Jewel of the Mountains AAU Grand Prix (Volleyball)

Sevierville/Wilderness at the Smokies

- 2021 K2 Wilderness at the Smokies (Volleyball)



Dominating Competitors

Events Play TN Sports partners recruited from other states:

- Chattanooga
 - Triple Crown Fastpitch Fourth of July Softball Tournament
- Crossville
 - Three USA Softball Showcases
 - Three Senior Softball World Series
 - Four soccer tournaments
 - High School 7 v 7 football tournaments
- Memphis
 - Hot Springs Classic Volleyball Tournament
- Rocky Top Sports World
 - Kohl's Professional Camps relocated two events from Wisconsin:
 - National Elite Camp (NFL free agents and college athletes)
 - National Invitational Scholarship Camp (high school athletes)
 - These two camps brought in athletes from 46 different states and Mexico.
 - Due to a high level of customer service and event execution by the staff at Rocky Top Sports World, Kohl's has decided to keep these events at Rocky Top Sports World for the next three years.
- Sevierville CVB/Convention Center
 - Dance/Cheer events



Partner Barriers to Success



Data Collection



Reporting



Administration



Nashville



Creative
Integration



Partner Spotlight Key Take-Away:

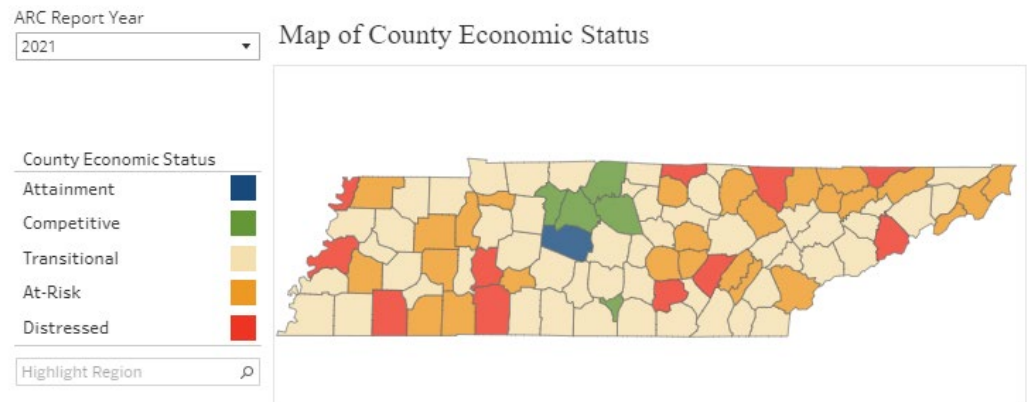
The reach of the Play TN Sports partners is of a global scale. Simply stated, the collective partnership is outperforming its resources. Individually, partners have done an amazing job casting a wide net of event procurement, providing overall diversity to the state's event portfolio. Now the partnership should shift its thinking to process efficiency and refinement, broader community and state-wide economic development achievement, and objective analysis of consistent metrics of success to strengthen the mutually beneficial relationship between the state and local officials.



Sports Tourism's Intersection with State Initiatives and Grants

Rural and Distressed Counties (Department of Tourism Development)

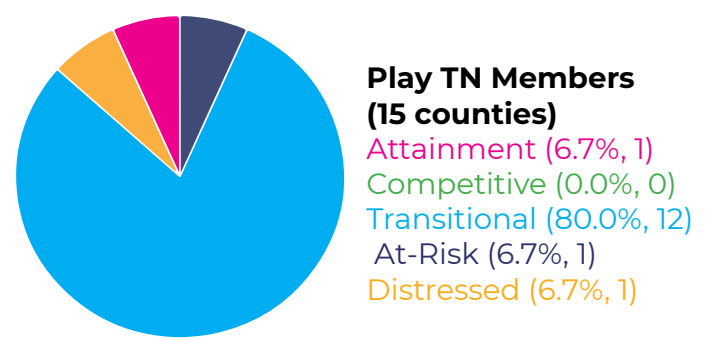
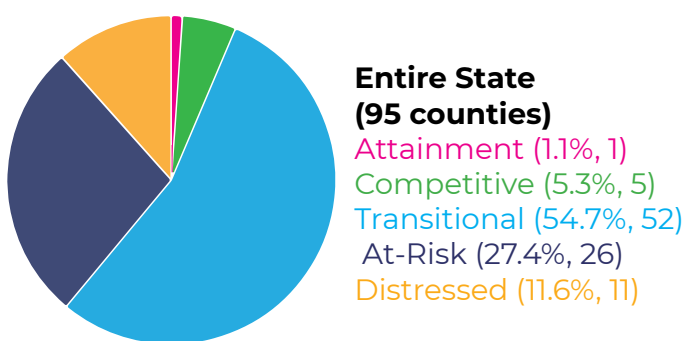
- Definitions: According to the U.S. Census Bureau, urbanized areas comprise larger places and the densely settled areas around them. Urbanized areas have an urban nucleus of 50,000 or more people. In general, they must have a core with a population density of 1,000 persons per square mile and may contain adjoining territory with at least 500 persons per square mile. Rural counties have less than 50% of their population living in an urbanized area.



- As of the 2015 census, 82% (78) of Tennessee's 95 counties were categorized as rural.

Partner County Economic Health Scores

- County Economic Status Comparison*



- Overall, 86.7% of counties with a Play TN member are at the transitional level or higher (state average is 61%).
- Play TN counties have an average composite index value of 116.7 compared to the state average of 137.8 warranting improvement.

*Some Play TN members are located within the boundaries of more than one county.



COUNTY	PLAY TN MEMBERS	ECONOMIC STATUS	COMPOSITE INDEX VALUE
Hamilton	Chatanooga	Transitional	97.7
Madison	Jackson	Transitional	124.4
	Crossville	Transitional	139.9
Washington	Johnson City	Transitional	113.3
Carter	Johnson City	Distressed	157.5
Sullivan	Johnson City, Kingsport	Transitional	120.6
Rutherford	Rutherford Co.	Transitional	94.8
Knox	Knoxville	Transitional	98.3
Putnam	Cookeville	Transitional	127.9
Sevier	Rocky Top, Sevierville	Transitional	117.9
Maury	Maury Co.	Transitional	103.9
Williamson	Franklin	Attainment	49
Hawkins	Kingsport	At Risk	145.6
Greene	Greene Co.	Transitional	140.4
Shelby	Memphis	Transitional	121.2

Play TN Average **116.7**

State Average 137.8

Davidson Nashville **Competitive** 87.5

Attainment	Best 10% of US Counties
Competitive	Best 10-25% of US Counties
Transitional	
At Risk	Worst 10-25% of US Counties
Distressed	Worst 10% of US Counties



For TDTD Rural and Distressed County-related grant opportunities applicable to Play TN Sports partners, see Appendix E.

Outdoor Recreation (Department of Environment and Conservation)
According to the Outdoor Industry Association's National Recreation Economy Report (2017):

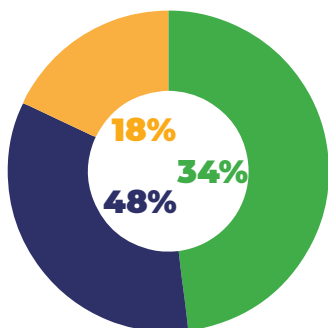
- Outdoor recreation accounts for \$887B in public spending annually.
 - **\$702.3B is generated from trip and travel spending**
- The outdoor industry also generates \$59.2B in state and local tax revenue.
- Outdoor recreation participants in the **East South Central Region** (TN, MS, AL, KY)
 - Spend \$56.4B
 - Support 522,000 industry-related jobs
 - Generate \$3.6B in state and local tax revenue
- **More Americans participate in outdoor recreation each year (145 million) than attend NFL, NBA, MLB, and NHL games combined (134 million)**

“From the smallest rural towns to the most densely packed cities, outdoor recreation powers a vast economic engine that creates billions in spending and millions of good-paying American jobs. Likewise, it is an under-appreciated and underfunded weapon against crime, poor academic performance and rising health care costs.”

- Outdoor Industry Association

Outdoor Recreation Differentiation

- **According to a 2019 report conducted by the Bureau of Economic Analysis (U.S. Department of Commerce), the state of Tennessee ranked:**
 - 19th among all states in Outdoor Recreation Satellite Account (ORSA) value added (GDP) and 7th among all states in ORSA value added growth.
 - 17th among all states in ORSA employment and 5th among all states in ORSA employment growth.
 - 19th among all states in ORSA compensation and 8th among all states in ORSA compensation growth.
- **Value added composition of outdoor recreation activities (percentage breakdown) for the state of Tennessee:**



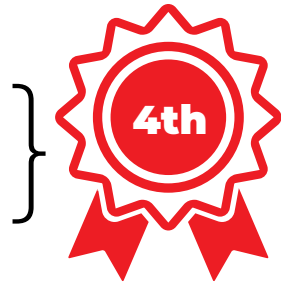
48% Supporting ORSA (activities that contribute to the core activities and include construction, travel and tourism, local trips, and government expenditures)

34% Conventional ORSA (traditional outdoor activities such as camping, hiking, boating, and hunting)

18% Other ORSA (activities that take place outside such as gardening and outdoor concerts)



- **When compared to its eight border states, Tennessee ranked:**



- 4th in ORSA Value Added (\$9.0B)
- 4th for ORSA employment (106,012 total jobs)
- 4th for ORSA total compensation (\$4.1B)
- 4th for value added by ORSA activity (includes 9 types of recreational activities)

For the 2019 ORSA Overview of GDP, Employment and Compensation Analysis for Tennessee and national map, see Appendix F.

The TEDC is currently conducting an economic impact analysis, public recreation user survey and public recreation inventory survey as part of their *Tennessee Statewide Parks, Recreation and Conservation Plan 2030*. **According to the TEDC, this document will serve as “a roadmap for the future of outdoor public recreation.”** When completed, this information would be very beneficial to Play TN Sports partners and aid in the decision-making process when evaluating events related to outdoor recreation.

Highlighted Partner Events - Outdoor Recreation

- Chattanooga
 - “Chattajack 31” Paddleboarding/Kayak Race (annual event)
 - 2019 Basspro.com Eastern Open
 - The “Head of the Hooch” rowing regatta (annual event)
 - 2019 Carhartt Bassmaster College Series Championship
 - 2020 Guaranteed Rate Bassmaster Elite at Chickamauga Lake
 - Chickamauga Lake ranked #15 in Bassmaster’s Top 25 Best Lakes of the Decade

This might be the first time someone with a disability will access nature off the pavement,” stated Catalyst Sports Founder Eric Gray. “There are almost 100,00 people with disabilities in the Knoxville area, this weekend could be a chance for them to be active in nature for the first time since their disability.”

- Cookeville/Putnam County
 - 2019 Pan Am Bass Kayak Championship
 - 2019 AMA Hillclimb Grand Championship
 - 2021 USA Kayak Open
 - 2022 International Federation of Fish Sports Freshwater Kayak World Championship
- Johnson City
 - Will host the 2021 PDGA Pro Masters World Disc Golf World Championships
- Knoxville



- 2019 Geico Bassmaster Classic
- Open Water Swim/2019 USMS Marathon
- 2019 USA Cycling Para-cycling Road National Championship
- 2021 Guaranteed Rate Bassmaster Elite at Tennessee River
- 2021 USA Cycling Professional Road National Championships
- Knoxville's First Adaptive Mountain Biking Weekend
 - On March 27th and 28th Catalyst Sports invited the community to learn more about adaptive mountain bike riding on Sharp's Ridge. "This might be the first time someone with a disability will access nature off the pavement," stated Catalyst Sports Founder Eric Gray. "There are almost 100,00 people with disabilities in the Knoxville area, this weekend could be a chance for them to be active in nature for the first time since their disability."
- Memphis
 - 2020 Mississippi River Monsters Catfish Tournament

For Outdoor recreation-related boarder state GDP matrix see Appendix G.

For Outdoor recreation-related grant opportunities applicable to Play TN Sports partners, see Appendix H.



Outdoor Recreation Key Take-Away:

Outdoor recreation is a growing and often overlooked segment of sports tourism on which Play TN Sports partners should focus given the unique asset portfolio in the state. It provides a complementary approach to traditional team and individual sports, is leading pandemic recovery numbers, provides the state with a niche for competitive advantage, creates health and wellness opportunities for local populous, and has very low barrier to entry for development among smaller communities/partners given the reliance on natural assets.



Tennessee as a Retirement Destination (ECD and TDTD)

- 20th Annual Transamerica Retirement Survey of Retirees (2020) findings:
 - When choosing where to live in retirement, retirees' top three criteria are proximity to family and friends (61%), affordable cost of living (55%), and access to Excellent healthcare and hospitals (46%). Other frequently cited criteria include: low crime rate (35%), good weather (33%), and **leisure and recreational activities (25%)**.
- Using net migration data from the U.S. Census Bureau, smartasset™ revealed the "Top 10 States Where Retirees are Moving." **Tennessee ranked #6 on this list.**

Retirement recruitment efforts – Senior/Master-Level Sports

Existing Marquee Event – TN Senior Olympics



- The **Tennessee Senior Olympics** began in 1981 and over 4,000 TN seniors compete in 10 sanctioned district Olympics held across the state.
 - Play TN partners (Knoxville, Chattanooga, Memphis, Jackson, Johnson City, and Crossville) host 6 of the 10 district championships.
 - Participants qualify for the week-long state finals (all sports except cycling, golf, and pickleball) hosted the last few years by Williamson County (**Franklin**).
 - The 2021 Pickleball finals will be held at the **Chattanooga** Convention Center.
 - Cycling will take place in Strawberry Plains (outside of **Knoxville**).
 - Overall, Play TN partners play a significant role in the success of Tennessee's Senior Olympics and should continue to support this outstanding program.
 - Play TN Sports includes the Tennessee Senior Olympics on their website's partner list.
- While many sport and outdoor recreation-related attractions are highlighted on the Tennessee Department of Economic and Community Development's "Quality of Life" webpage, there is no mention of the **Tennessee Senior Olympics**.
- The "Retire Tennessee" page linked to the Department of Tourism's site neglects to mention the **Tennessee Senior Olympics** as an attraction for active-minded retirees.

Existing – Other Partner Senior Events

- ISSA Smoky Mountain Senior Classic (Softball) - **Knoxville**
- Tennessee Senior State Open (Golf) - **Crossville**
- **Memphis** will host the 2021 Tennessee Senior and Super Senior Amateur Championship August 17-19



For an outline of the example opportunity to enhance retiree recruitment through Pickleball, see Appendix I.



Retiree Recruitment Key Take-Away:

Sport tourism provides an excellent opportunity for joint marketing and conduit of exposure to Tennessee as an ideal place to retire. While tourism provides a nice burst of tax revenue, leveraging even a sliver of tourists into future residents is a realistic aspiration. Play TN Sports partners should make a more concerted effort to recruit/build events catering to the target markets identified by the TDTD's retiree program and may be incentivized to do so. Immediate opportunity exists to leverage existing senior/masters-level events and build events catering to this objective.



Recap and Recommendations

Recommendations

Tennessee is prime position to capitalize on tourism and specifically sports tourism because:

- No state income tax yields higher average state sales tax (7%)
 - Tennessee is T5th highest behind CA with RI, MS, IN
 - Tennessee is 2nd highest behind CA in state and average local tax rate (9.47%)
- Flagship and legacy tourism attractions in geographically dispersed locations
- Diverse asset portfolio
- Lag in competitive set(s)
- Symbiotic relationship building

Recommendations

- Dive deeper into existing opportunities to utilize sports tourism as a catalyst for state initiatives (TDTD and other departments)
- Analyze what non-financial resources already exist at the state level to supplement Play TN Sports efforts (i.e. access to regular data, sport-related travel economic impact reporting by county, etc.)
- Develop consistent and uniform data collection and reporting practices among Play TN Sports partners
- Evaluate “easy wins” for state/Play TN Sport collaboration through existing event portfolio enhancements
- Implement opportunities to establish Tennessee as clear, present leader among industry counterparts in the immediate recovery term (i.e. whitepaper development and marketing push)



Enhanced Web and Social Media Marketing Cohesion

- More/newer platforms: Facebook (Play TN Sports page currently has 33 likes/followers), Twitter, Instagram, YouTube, etc.
- Interactive content – video clips, maps, graphics, search tools
- Website updates – Partner lists, news stories, etc.
- Enhanced profile as conduit of exposure on state sites (similar to Virginia Tourism Authority, Sports Indiana, and Pure Michigan Sports)

Explore Legacy Program Development

- Cultivate a legacy program providing increased and sustainable funding for Play TN Sports (*Example: Florida Sports Foundation License Plate Program, See Appendix J*).
- Explore grant opportunities among sports betting fund recipient agencies.



Data Sources

- US Bureau of Labor and Statistics
- US Economic Development Administration
- Economic sheets for add'l states
- 2019 Sports ETA State of the Industry Report
- 2020 Resident Sentiment of Sport White paper
- 2021 Expanded Definition of Success White paper
- Tennessee ORSA Summary Sheet
- 2020 Transamerica Retirement Survey of Retirees
- Border State Budgets
- Nashville Sports Council Industry Report 2019-20
- ORSA Summary Sheets for Border and Non-Beach Competitors
- Various Partner Highlights (news stories)
- Rural Tourism news stories
- Retire TN Criteria
- TN Grant Information (Tourism Marketing, Adventure Tourism, Tourism Enhancement)
- Tennessee 2020 Plan
- 2019 Economic Impact of Travel on Tennessee
- Tennessee COVID-19 Research
- The Economic Impact of Travel on Tennessee Counties
- Tourism – Tennessee's Economic Recovery Engine
- TDTD HTN Data Presentation
- Tennessee Budget FY 2020-21 and 2021-22 (tourist development sections)
- SportsTravel Magazine – Various TN-related articles
- Tennessee Distressed and At-Risk Counties 2020
- TDTD Travel Snapshots (counties with Play TN partner)
- Sports ETA 2019 State Association Research Study
- Sports ETA 2021 Budget Study
- 2019 Tennessee Boating Incident Statistical Report
- Tennessee Wildlife Resources Agency



About Stoll Strategies

Jennifer Stoll, PhD founded Stoll Strategies in 2018 with one goal in mind – propelling the sports events and tourism industry to the next level by putting her passion for sports and her love for learning, research and advising to work.

Jennifer supports, guides, and creates practical solutions catered to its partners across the world through the convergence of custom tailored research, real-world experience, and the power of thinking big.

Using an economic development lens, she helps her clients define the often intangible benefits of sports events and tourism to create long-term success and sustainability

A former collegiate softball player, she earned her Sports Management degree from Colorado Mesa University.



She went on to graduate with her Master's in Sport Administration from the University of Louisville and a doctorate in Sport Tourism from Troy University. In her downtime, you can find Jennifer on her farm or exploring in the mountains of Western Colorado with her husband and two young kids.



Appendices

Appendix A: Partner Data Collection Participation

PLAY TN SPORTS DATA COLLECTION

	Folder Upload	Questionnaire	Phone/Zoom
Chattanooga	✓	✓	✓
Crossville	✓	✓	✓
Cookeville	✓	✓	✓
Franklin	✓	✗	✗
Greene Co.	✓	✓	✓
Jackson City	✗	✗	✗
Johnson City	✓	✓	✓
Kingsport	✓	✓	✓
Knoxville	✓	✓	✓
LeConte	—	✗	✗
Maury Co.	✗	✗	✗
Memphis	✓	✓	✓
Rutherford Co.	—	✗	✗
Sevier/Wilderness	✓	✓	✓
Rocky Top	✓	✓	✗
Complete	11	10	9
Minimal	2	0	0
None	2	5	6
Total	15	15	15
Completion %	87%	67%	60%



Appendix B: Play TN Sports State Comparisons

PLAY TN SPORTS STATE COMPARISONS

State Sports Tourism Association State Funding and Budgets

State	State Funding*	Rank	Border Rank	Association Budget	Rank	Border Rank
Alabama	25,000	19	6	51,000	18	7
Arkansas	52,000	13	2	52,000	17	6
Connecticut	450,000	4		700,000	4	
Delaware	unknown			unknown		
Florida	4,897,160	2		6,121,450	2	
Georgia	0	24	8	45,650	19	8
Iowa	500,000	3		45,500	20	
Illinois	50,000	T14		0	25	
Indiana	150,000	7		160,000	8	
Kansas	6,000	22		10,800	24	
Kentucky	50,000	T14	3	125,000	10	1
Louisiana	unknown			21,000	13	
Maryland	350,000	5		200,000	6	
Maine	130,000	8		130,000	9	
Michigan	75,000	T10		107,000	12	
Minnesota	2,500	23		22,500	22	
Missouri	20,000	20	7	89,587	14	4
North Carolina	50,000	T14	3	110,500	11	2
Nebraska	9,000	21		26,000	21	
Oregon	100,000	9		1,000,000	3	
Pennsylvania	60,000	12		300,000	5	
South Carolina	35,000	T17		80,000	15	
Tennessee	35,000	T17	5	90,000	13	3
Utah	7,670,086	1		7,670,086	1	
Virginia	75,000	T10	1	75,000	16	5
Wisconsin	250,000	6		180,000	7	
Average	626,739			696,523		
Border Average	38,375			79,842		

Source: Sports ETA 2021 State Association Budget and Funding Study

***Combined direct & grant funding**

Border State (no MS data since they do not have a state sports tourism association)

This table represents each state sports tourism association's funding from the state and its rank based upon total dollar amount. It also represents the organizations' overall operational budget and its rank among all state sports tourism associations budget figures.



*Boarder State Overall Tourism Budget and Percent Allocation
to State Sports Tourism Organization*

State	Tourism Budget*	Rank	Agency Name as Listed in State Budget	State Sport Assoc. Funding	%	Rank
Alabama	26,784,100	2	Bureau of Travel and Tourism	\$25,000.00	0.09%	T6
Arkansas	1,909,991	9	Tourism Division and Tourism Promotion	\$52,000.00	2.70%	1
Georgia	11,368,545	6	Tourism	\$0.00	0.00%	8
Kentucky	3,205,000	8	Kentucky Dept. of Tourism	\$50,000.00	1.50%	2
Mississippi	6,072,365	7	Tourism (does not include Welcome Centers)	N/A	Unknown	
Missouri	18,588,702	5	Tourism Commission	\$20,000.00	0.11%	5
North Carolina	18,955,996	4	Economic Dev. Partnership of North Carolina	\$50,000.00	0.26%	4
Tennessee	36,765,800	1	Tourist Development	\$35,000.00	0.09%	T6
Virginia	21,093,272	3	Virginia Tourism Authority	\$75,000.00	0.36%	3

*FY 2021

This table represents Tennessee boarder states' overall tourism budget and amount and percent of that budget allocated to state sport tourism associations.

Appendix C: State Sports Tourism Association Funding Comparisons

State Sports Tourism Association Funding in Relation to Association Overall Budget

State	State Funding*	Rank	Non-Beach	Association Budget	Rank	Non-Beach
Alabama	25,000	19	2	51,000	18	5
Arkansas	52,000	13		52,000	17	
Connecticut	450,000	4		700,000	4	
Delaware	unknown			unknown		
Florida	4,897,160	2		6,121,450	2	
Georgia	0	24		45,650	19	
Iowa	500,000	3		45,500	20	6
Illinois	50,000	T14	T3	0	25	1
Indiana	150,000	7	1	160,000	8	
Kansas	6,000	22		10,800	24	2
Kentucky	50,000	T14	T3	125,000	10	
Louisiana	unknown			21,000	13	
Maryland	350,000	5		200,000	6	
Maine	130,000	8		130,000	9	
Michigan	75,000	T10		107,000	12	
Minnesota	2,500	23		22,500	22	4
Missouri	20,000	20	6	89,587	14	
North Carolina	50,000	T14		110,500	11	
Nebraska	9,000	21		26,000	21	
Oregon	100,000	9		1,000,000	3	
Pennsylvania	60,000	12		300,000	5	
South Carolina	35,000	T17		80,000	15	3
Tennessee	35,000	T17	5	90,000	13	
Utah	7,670,086	1		7,670,086	1	
Virginia	75,000	T10		75,000	16	
Wisconsin	250,000	6		180,000	7	
Average	626,739			696,523		
Non-Beach	59,500			86,097		

*Combined direct & grant funding

Non-Beach Competitive States

This table represents overall state sports tourism association from their respective states and rank. It also displays state association operational budget and rank of the portion of each entity's funding from the state.



Appendix D: Play TN Sports Engagement with TSSAA

TSSAA Events

- Spring Fling
 - TSSAA is the only high school athletic organization in the United States to have a seven-sport, Olympic-style spring sport championship tournament for baseball, softball, track and field, team and individual tennis and soccer.
 - Destinations were given the opportunity to bid on the event in 1993.
 - **Chattanooga** 1994 to 2002
 - **Memphis** – 2003 to 2005
 - Murfreesboro (**Rutherford County**) - 2006 to present
- BlueCross Bowl (Football)
 - Tennessee Tech University's Tucker Stadium (**Cookeville/Putnam County**) was home to the TSSAA State Football Championships from 2009 to 2020.
 - On March 16, 2021, the TSSAA Board of Control selected **Chattanooga** as the Blue Cross Bowl host for 2021 and 2022.
- BlueCross State Championships (Basketball)
 - Hosted by Tennessee Tech University (**Cookeville/Putnam County**) and Middle Tennessee State University (**Murfreesboro/Rutherford County**)
 - The Charles M. Murphy Athletic Center (MTSU) has hosted TSSAA state basketball tournaments since 1973.
- Golf Championships
 - The **Sevierville** Golf Club was selected to host the State Golf Championships in 2021 and 2022.
- Soccer Championships
 - **Chattanooga** was selected to host the Girls' State Soccer Championships for 2021 and 2022
- Wrestling Championships
 - From 2010 to 2020, the TSSAA Wrestling State Championships were held at the Williamson County Ag Expo Park (**Franklin**).
 - The 2021 Dual Wrestling Championships were held at the Williamson County Ag Expo Park.
 - The TSSAA Wrestling State Championships returned to **Chattanooga** in 2021 after a 12-year absence (due to the Williamson County Ag Expo Center being used as a COVID-19 testing center).



- Cross Country Championships
 - The state cross country meet had been conducted at Nashville's Percy Warner Park for 49 consecutive years before moving to Sanders Ferry Park (Hendersonville) in 2020 due to COVID-19 concerns and the city of Nashville's phased reopening plan.
- Cheer/Dance
 - The 2019 TSSAA Cheer/Dance Championships were held at the Murphy Center **(Murfreesboro/Rutherford County)**

Appendix E: Rural and Distressed County Grant Opportunities

- The Tourism Enhancement Grant Program was developed to help communities improve their tourism assets and increase tourism-related economic impact. This program is designed for city and county governments and is a \$75,000 grant with a match requirement.
- Several local and regional projects (funded by the state and local partners) are listed on the state's "best practices" webpage. Several sport and/or outdoor recreation projects received tourism enhancement grants from the state. These include:
 - Danville Landing Recreation Area Improvements
 - Greene County Tennis Association
 - DeKalb County Health Adventure
 - Fish Dayton
 - Carroll County Shooting Sports Park
 - Dandridge Dock
- The Tourism Marketing Grant Program provides tourism organizations such as CVBs, chambers of commerce or regional tourism organizations a way to expand their marketing message. The program currently has a \$1 million budget and is a 1:1 reimbursable grant.
- In 2020, 17 Tennessee communities received more than \$1 million in grant funding. "Tourism is vital to fuel economic development in Tennessee," said Governor Bill Lee. "These grants are especially important this year as we look to rebuild and restore our state's tourism, particularly in Tennessee's rural communities." Governor Bill Lee's first executive order was to better serve rural communities. These tourism enhancement grants will address tourism needs for eight at-risk and six distressed communities. **"Tennessee has unparalleled outdoor beauty, waterways, fishing, boating and rural destinations rich with history, hidden gems and hospitality,"** said Commissioner Mark Ezell, Tennessee Department of Tourist Development. "Our partnership with TNECD allows us to invest in unique projects that drive tourism and visitation, ultimately bringing more funds back into communities." **"This partnership helps rural communities across the state bring their tremendous tourism assets into the spotlight and will help boost the state's overall economic prosperity,"** added Commissioner Bob Rolfe, Tennessee Department of Economic and Community Development.
- Additionally, the Tennessee Department of Tourist Development received \$25 million in federal CARES Act funding to remarket the severely devastated tourism industry and promote safe travel. **\$15 million in grants has been allocated for Destination Marketing Organizations (DMOs) in all 95 counties for this purpose.**
- Sponsored by Sen. Ken Yager and passed in 2011, the Tennessee Adventure Tourism and Rural Development Act is designed to identify the category and help businesses in the classification gain a foothold in rural areas. The act promotes outdoor recreational opportunities and helps support businesses that grow out of those activities, including trails riding (equine and



motorized), rafting and kayaking, rock climbing, mountain biking and many other recreational activities.

- Applications to designate an area as an **Adventure Tourism District** are accepted year-round. Applications must include a resolution from the local governing body authorizing creation of the district, a parcel map of the proposed district including parcel numbers, a business plan that must be based on “quantifiable data demonstrating that the creation of an adventure tourism district would enhance sustainable economic development in the area,” and a notarized letter from the local government mayor or executive which confirmed their plan. An entire county cannot be designated as one district. Approval as an Adventure Tourism District allows qualified businesses that locate within the district to earn a jobs tax credit to offset a portion of the business’ Tennessee franchise and excise tax liability. The qualified business must make a capital investment of at least \$500,000 and create the required number of full-time jobs.
 - **The Cookeville-Putnam County CVB** has been designated by the State of Tennessee as a certified adventure tourism district.



Appendix F: 2019 ORSA GDP Overview for Tennessee and National Map

2019 - Tennessee

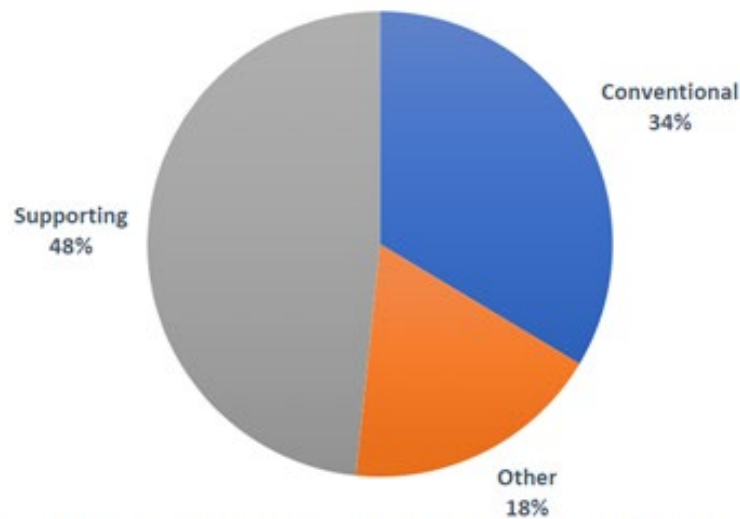
Outdoor Recreation Satellite Account (ORSA)

Value Added (GDP)		Employment		Compensation	
ORSA Total	Share of State	ORSA Total	Share of State	ORSA Total	Share of State
\$9.0 Billion	2.4%	106,012 Jobs	2.5%	\$4.1 Billion	2.1%

Value Added by Select ORSA Activity (\$ 000s)

Activity	2017	2018	2019	State Rank
Boating/Fishing	545,361	595,770	630,737	11
RVing	282,006	299,585	314,599	19
Hunting/Shooting/Trapping	144,506	154,612	184,612	18
Equestrian	150,338	167,023	170,810	21
Motorcycling/ATVing	143,796	147,227	156,698	20
Climbing/Hiking/Tent Camping	66,878	71,345	73,207	19
Snow Activities	39,281	41,590	43,680	28
Bicycling	19,017	19,740	21,819	24
Recreational Flying	12,501	12,810	13,658	30

Value Added Composition of Outdoor Recreation Activities



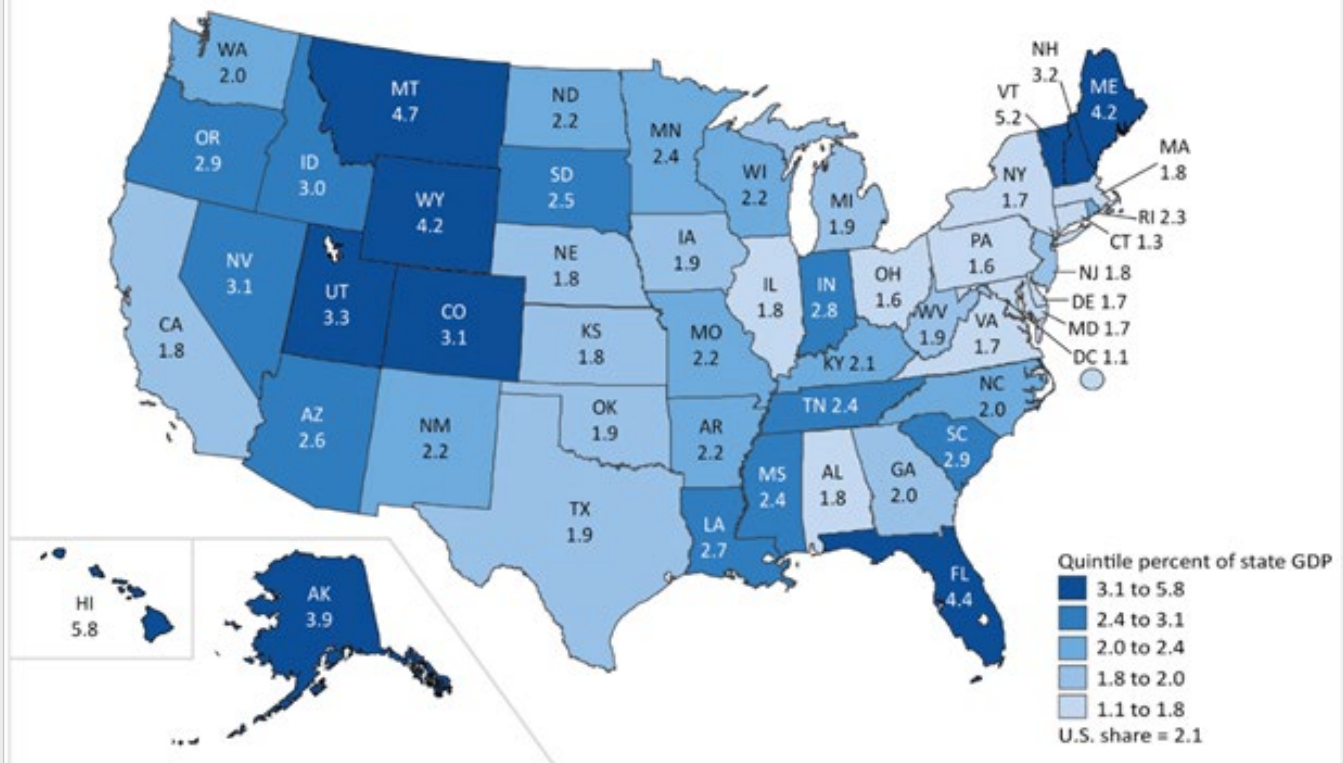
Conventional ORSA activities include traditional outdoor activities such as camping, hiking, boating, and hunting.

Other ORSA activities include those activities that take place outside, such as gardening and outdoor concerts.

Supporting ORSA activities, are those that contribute to the core activities and include such things as construction, travel and tourism, local trips, and government expenditures.



State Outdoor Recreation Value Added as a Percent of State GDP, 2019



U.S. Bureau of Economic Analysis



Appendix G: Outdoor recreation-related boarder state GDP matrix

US Department of Commerce - Bureau of Economic Analysis Outdoor Recreation Satellite Account (2019)

State	Value Added (GDP)		Employment		Compensation		Value Added by ORSA Activity (All U.S.)	
	ORSA Total (Billions)	Share of State (%)	ORSA Total (Jobs)	Share of State (%)	ORSA Total (Billions)	Share of State (%)	Average	Border Rank*
Alabama	\$4.2	1.8	62,687	2.3	\$2.0	1.6	30.3	7
Arkansas	\$2.9	2.2	40,165	2.4	\$1.4	2.0	32.7	8
Georgia	\$12.4	2.0	143,122	2.2	\$6.3	1.9	13.1	1
Kentucky	\$4.5	2.1	55,707	2.2	\$2.0	1.7	26.9	6
Mississippi	\$2.8	2.4	33,592	2.1	\$1.1	1.8	35.2	9
Missouri	\$7.4	2.2	92,505	2.4	\$3.7	1.9	16.3	3
North Carolina	\$12.1	2.0	151,661	2.5	\$5.8	1.8	14.0	2
Tennessee	\$9.0	2.4	106,012	2.5	\$4.1	2.1	21.1	4
Virginia	\$9.3	1.7	123,369	2.3	\$4.7	1.5	21.7	5

*Border rank based upon averages of the following value added activities: Boating/Fishing, RVing, Equestrian, Hunting/Shooting/Trapping, Motorcycling/ATVing, Climbing/Hiking/Tent Camping, Recreational Flying, Bicycling, Snow Activities.



Appendix H: Outdoor Recreation-Related Grant Opportunities

Grant Opportunities

- Local Parks and Recreation Fund (LPRF)

The LPRF program provides state funding for the purchase of land for parks, natural areas, greenways **and the purchase of land for recreational facilities**. Funds also may be used for trail development and capital projects in parks, natural areas and greenways. Recreation Educational Services administers the LPRF grants. These grants are a 50% match.

- Recreational Trails Program (RTP)

The Recreational Trails Program (RTP) is a federal funded, state administered grant program. The RTP provides grant funding for land **acquisition for trails, trail maintenance, trail construction, trail rehabilitation and for trail head support facilities**. These funds are distributed in the form of an 80% grant with a 20% match. Local, state and federal land managing agencies are eligible to apply as well as state chartered, non-profit organizations with IRS 501 (c) (3) status that have a written agreement for trail management with an agency. All grant projects MUST be on publicly owned land.

- Tennessee Recreation Initiative Program (TRIP)

The Tennessee Recreation Initiative Program (TRIP) apportions grant money to cities and counties who lack professional park and recreational directors and do not provide a comprehensive recreation delivery system in their community to assist with the establishment of the first Parks and Recreation Department. These grants are a three-year commitment, \$50,000 grant matched equally by the communities.

- Land and Water Conservation Funds (LWCF)

The LWCF program provides matching grants to states to administer to state and local governments for the acquisition and **development of public outdoor recreation areas and facilities**. Recreation Educational Services administers the LWCF grants in Tennessee. These grants require a 50% match.



Appendix I: Example opportunity to enhance retiree recruitment through Pickleball

Pickleball and Retiree Recruitment Opportunities

- Increase Statewide Pickleball Presence
 - Tennessee is in USA Pickleball's Mid-Atlantic region
 - The Sports and Fitness Industry Association's 2019 report indicated pickleball continued to be of the fastest growing sports in the U.S. as participation reached 3.3 million.
 - The USA Pickleball Association reached 40,000 members by the end of 2019, a 1,000% growth rate since 2013.
 - AARP: [Play Pickleball for Health Benefits](#)
 - NPR: [Pickleball for All: The Cross-Generational Power of Play](#)
 - USA Pickleball's "Places 2 Play" search tool revealed:
 - 111 indoor and 80 outdoor pickleball courts in Tennessee
 - Pickleball clubs/facilities reported 1,657 registered players (number of seniors within this population is unknown).
 - In 2020, USA Pickleball had 54 sanctioned tournaments across the U.S. Only one took place in Tennessee (Music City Pickleball Smashville Jam in Franklin)
 - In 2019, USA Pickleball had 169 sanctioned tournaments across the US and just three were hosted by Tennessee destinations.
 - Pickleball Nashville Labor Day Tournament (Brentwood)
 - 1st Annual Volley for Change (Knoxville)
 - 3rd Annual Logan Stanley Memorial Classic (Brentwood)
 - When interviewed for this study, **Crossville** reported that they had converted their tennis courts to pickleball courts a few years ago and they had become a **"cash cow."**
 - Pickleball is one of the sports included in the **Tennessee Senior Olympics** and the state finals will be held August 6-8 in the **Chattanooga** Convention Center.



Appendix J: Legacy Program License Plate Program Example

- A portion of each tag fee (between \$15-\$25, depending upon the license) goes either to the team's designated youth charity, is given out in grants by the Florida Sports Foundation to support sporting events across the state, and helps support the Sunshine State Games and other sports development opportunities.
 - Florida currently offers 16 specialty sports plates (nine professional sports franchises, NASCAR, Play Tennis, Support Florida Special Olympics, Police Athletic League, Golf Capital of the World, Share the Road, and Team USA).

Tennessee's Personalized License Plate Program (Department of Revenue)

- Tennessee's specialty license plates require a \$61.50 annual fee; \$35 of that fee is allocated to the Tennessee Arts Commission, the plate's respective beneficiary, and the Highway Fund.
 - The more than 100 plate beneficiaries received a total of \$5,069,017 in FY 2020.
 - The most popular plate in FY 2020 was "Friends of the Smokies" (18,832 total plates raising \$642,903 to the beneficiary)
- The State of Tennessee allows residents to purchase 5 sport-related specialty plates: Memphis Grizzlies, Nashville Predators, Tennessee Titans, UT Football Championship and UT Womens Basketball Championship.
 - Proceeds Benefit:
 - Grizzlies – Memphis Grizzlies Charitable Foundation
 - Predators – Nashville Predators Foundation (9th most popular plate, \$109,391 to beneficiary)
 - Titans – No charitable source listed
 - UT Football – University of Tennessee's General Scholarship Fund
 - UT Women's Basketball - University of Tennessee's General Scholarship Fund
 - **Possibilities** – "Play TN Sports" themed license plate that benefits sport tourism development within the state.
 - Designs – There are currently no specialty plates for golf, boating/kayak, softball, baseball, youth sport, Tennessee Senior Olympics, etc.
 - Fishing – TWRA and the Tennessee Chapter of Trout Unlimited benefit from the two fishing-related specialty plates.
 - Hiking – Appalachian Trail Conservancy has a plate.
 - Cycling – The Jeff Roth Cycling Foundation is the beneficiary of the "Share the Road" plate

