

Travel and Tourism **Economic Contribution Report**

**2012**  
FISCAL YEAR

**Find Your True...**

**MISSISSIPPI**

**Thrill**

**Game**

**Blues**



**Fiscal Year 2012  
Economic Contribution  
of  
Travel and Tourism  
In Mississippi  
February 2013**

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## INTRODUCTION

Mississippi's executive and legislative branches have recognized that Travel and Tourism is a driving force in the state's economic development efforts. These efforts have paid dividends.

Travel and Tourism's visibility in Mississippi is at an all-time high. Fifty-six local entities with a Travel and Tourism component were in place as of February 2013. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

U.S. Travel and Tourism had \$759 billion in direct domestic + international expenditures with 7.5 million direct jobs, 6.9 million indirect and induced jobs, \$195.6 billion in payroll income, and \$124 billion in combined federal, state and local tax revenues, CY 2011 data per the U.S. Travel Association (USTA).

This report estimates Travel and Tourism's FY 2012 economic contribution at the state and county level for Mississippi. Travel and Tourism is vital to Mississippi's economy and economic development engine, based on these estimates:

- Travel and Tourism accounted for 83,345 direct jobs in FY 2012, versus 82,000 in FY 2011, or + 1.6 %. Travel and Tourism comprised 7.7 % of FY 2012 total statewide establishment-based nonfarm employment. Some 81,200 of these FY 2012 jobs, or 97.4 %, were private sector ones.
- Travel and Tourism had 33,135 indirect and induced jobs in FY 2012. Travel and Tourism total employment [direct + indirect + induced] was 116,480, or 10.7 % of statewide employment.
- Travel and Tourism ranked 4th in FY 2012 direct private sector employment, for all sectors.
- FY 2012 Travel and Tourism annual payroll for direct jobs = \$1.83 billion, \$58 million more, or + 3.3 % versus \$1.77 billion in FY 2011. FY 2012 indirect and induced labor income = \$975 million. Total FY 2012 labor income (direct payroll + indirect + induced) = \$2.8 billion.
- Travel and Tourism is one of Mississippi's largest export industries, and a major contributor to its financial affairs and quality of life. IF the 83,345 direct statewide Travel and Tourism jobs were eliminated in December 2012, the state's unemployment rate would be 15.3.
- Without Travel and Tourism: \$402 million less in General Fund Revenues; 116,480 fewer total jobs [direct + indirect + induced]; \$2.8 billion less in total annual payroll associated with this industry; and, a decrease in the state's overall quality of life, if other industries were constant.
- \$6.16 billion in FY 2012 Travel and Tourism expenditures by visitors, a 3.1 % increase versus \$5.97 billion in FY 2011. Travel-related demand and travel inflation were several reasons.
- Travel and Tourism's proportion of Mississippi's FY 2012 General Fund—\$402 million of \$4.8 billion—was 8.4 %, or \$1 of every \$12. The \$402 million was a 4.5 % increase versus \$384.5 million in FY 2011 Travel and Tourism General Fund revenues.
- FY 2012 Tourism Capital Investment (TCI)—new/renovated contract construction costs—was \$184.9 million, a 2.5 % decrease from FY 2011.
- FY 2012 Travel and Tourism state taxes and fees collected = \$456.6 million, a 4.2 % increase compared to FY 2011.
- FY 2012 state-licensed casino taxes attributed to Travel and Tourism of \$133 million, 70.7 % of approximately \$188 million in Travel and Tourism state taxes collected by these casinos.
- FY 2012 City/County tax revenues (room/restaurant, state-licensed casinos, motor vehicle rental, Alcohol Beverage Control, petroleum, hotel real/personal property taxes): \$169.2 million.
- Combined FY 2012 Travel and Tourism state and local taxes/fees collected = \$625.8 million. These FY 2012 combined taxes and fees translated to \$550 per household in tax relief, a 4.4 % increase compared to the estimated \$527 per household in state + local tax relief for FY 2011.
- Statewide hotel/motel rooms decreased from 57,451 on June 30, 2011, to 56,897 on June 30, 2012, or - 1.0 %. Hotels/motels totaled 669 on June 30, 2011; 667 on June 30, 2012, - 0.3 %.
- Mississippi's estimated 21.3 million total visitors in FY 2012, a 2.4 % increase from FY 2011, included mostly domestic visitors (person-trips)—sum of overnight leisure + leisure day-trip + overnight/day business travelers + combined business/leisure travelers and other personal business + pass-throughs + group tour visitors.

- About 65 % of all domestic visitors overnighed in the state.
- 73 % of the FY 2012 visitors to Mississippi, were from out-of-state, or “Travel and Tourism Exports.” They spent “new” dollars in Mississippi for goods and services.
- 82 % of all FY 2012 overnight leisure visitors came from eight states—Mississippi (27 %), Louisiana (13 %), Alabama (10 %), Tennessee (9 %), Texas (7 %), Florida (6 %), Georgia (5 %) and Arkansas (5 %).
- An estimated 85 % of all FY 2012 household travel party expenditures were from out-of-state.
- Travel and Tourism’s estimated direct portion (value added) of the State Gross Domestic Product (GDP) was 2.7 % in FY 2012, and 2.7 % in FY 2011, factoring in travel expenditures.
- FY 2012 total value added associated with Travel and Tourism = 4.0 % of GDP.
- FY 2012 Welcome Center persons served: 2,581,210, or + 4.8 % versus 2,462,788—FY 2011.
- Thirteen Mississippi counties with \$120 million + in FY 2012 Travel and Tourism expenditures by visitors.
- Nineteen Mississippi counties with over 1,000 direct Travel and Tourism jobs in FY 2012.

Estimated FY 2012 Travel and Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Travel and Tourism tax revenues cited on pages 4-5 include dollars from in-state/out-of-state Mississippi tourists/visitors and some pass-through travelers.

## **METHODS**

The purpose of this report was to estimate Travel and Tourism’s FY 2012 statewide economic contribution in terms of State Gross Domestic Product (GDP) and Total Value Added, jobs (direct and indirect & induced), payroll (labor income), sales (expenditures), capital investment, and State tax revenue—including the General Fund portion—plus local level (city/county) indicators. County indicators include estimated Travel and Tourism jobs (direct only), expenditures and capital investment. Room/Restaurant tax revenues are presented, as part of state/local taxes for each county attributed to Travel and Tourism.

Other trends, e.g., Visitor Profile/special survey data, Highway Welcome Center highlights, and Airport passenger data, are covered. The Profile and Airport data are secured via surveys. Ditto for federal entities with an October to September FY: Vicksburg Military Park, Natchez National Historical Park, Bay Springs Site, Columbus Office, Vicksburg headquarters—U.S. Army Corps of Engineers, Shiloh National Military Park and Brice’s Crossroads National Battlefield Site. Most of Mississippi’s Convention and Visitor Bureaus are on an October-September FY, but the Department of Revenue (DOR) compiles tax revenue information on a monthly and state FY basis. DOR provided most of the statewide and county revenue figures. They facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation and attractions/entertainment/recreation information electronically.

Mississippi Gaming Commission (MGC) quarterly surveys supply state-licensed casino hotel lodging variables, advertising expenditures, and capital investment. Other state agencies surveyed, with a Travel and Tourism connection: Mississippi Arts Commission (MAC); Department of Marine Resources (DMR); Mississippi Department of Archives and History (MDAH); Department of Wildlife, Fisheries & Parks (DWF&P)/Mississippi Museum of Natural Science; Pearl River Basin Development District; and the Pearl River Water Supply District.

FY 2012 employment and payroll data were primarily calculated from quarterly figures compiled by the Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department. Outdoor Recreation Survey resulted in jobs/payroll data for a cross-section of outfitters, hunting/fishing guides. Other state and federal agencies, as well as local Tourism Offices and Museums, furnished employment/payroll data via specific surveys.

Estimated statewide Travel and Tourism expenditures are included by category. Statewide petroleum purchases and revenues at the retail level were calculated via self-service unleaded gas price averages for regular, mid-grade and premium fuel reported by AAA’s web site. Sources for information on sales of petroleum products into Mississippi were MDA Energy Division, the DOR and the Mississippi Department of Transportation (MDOT). The Petroleum Tax Division of the DOR provided sales/collections data for gasoline and undyed diesel fuel at 18 cents.

Travel and Tourism expenditures, employment and capital investment were estimated at the county level. Some counties have economies more geared to Travel and Tourism. Various surveys, reports and other parameters were used to make these estimates.

Travel and Tourism's Broader View and Economic Development are on pages 14–18. The focus is on GDP, Total Value Added, State–Level Travel and Tourism Accounts, Employment and Labor Income Multipliers, Travel and Tourism Exports and Imports, Estimated Effective Tax Rates, and Employment Rankings—within the state and compared to other states.

## **FINDINGS**

Food Services and Drinking Places, Gaming (state–licensed), and Lodging jobs were the top three in direct Travel and Tourism Employment, in Mississippi, based on Appendix A. The 23,415 state–licensed casino gaming jobs, including casino hotels, equaled 28.1 % of 83,345 direct Travel and Tourism Employment. All other 59,930 direct Travel and Tourism jobs were 71.9 % of these direct jobs.

Appendix A comprises Travel and Tourism direct employment breakdown by category for FY 2011 and 2012. The narrative section on page 15 summarizes data on indirect and induced jobs. Appendix B shows FY 2011 and 2012 payroll–related information by employment component. The indirect and induced labor income multipliers are presented on page 15.

Estimated Travel and Tourism expenditures by visitors were \$5.97 billion in FY 2011 and \$6.16 billion in FY 2012, per Appendix C. FY 2011 and 2012 estimated General Fund revenues are Appendix D—\$384.5 million in FY 2011 and \$402 million in FY 2012. Travel and Tourism's \$402 million slice of the FY 2012 General Fund was 8.4 %, from visitor expenditures, Tourism Capital Investment (TCI), Travel and Tourism Personal Income, Sales Taxes and other taxes.

Appendices E and F, respectively, have estimated FY 2011/2012 county level Travel and Tourism Expenditures by Visitors, direct Travel and Tourism Employment, Travel and Tourism employment percentage, State and Local Sales Taxes attributed to Travel and Tourism, and TCI data. Appendix G presents FY 2011 and 2012 statewide and countywide hotel/motel room data. Appendix H is a county breakdown for the state's five Tourism Regions: The Capital/River Region, The Coastal Region, The Delta Region, The Hills Region, and The Pines Region.

## **TRANSPORTATION**

Highway Welcome Center statistics, Regional Airport data, a Motor coach snapshot and Amtrak data are highlighted, primarily as FY 2012 snapshots.

### ***Welcome Center Registration Data***

Travel party registrants provide the Welcome Centers with trip–related information. Welcome Center registrants comprised about four–fifths of the persons serviced in FY 2012, with 2,072,437 registrants out of 2,581,210 persons serviced. Most Welcome Center registrants were U.S. residents. International travelers, in FY 2012, comprised 53,402, or 2.6 % of the 2,072,437 registrants. This proportion was 2.5 % in FY 2011 based on 49,340 international registrants. U.S. registrants increased from 1,951,717 in FY 2011 to 2,019,035 in FY 2012, or 3.4 %. The international segment increased by 8.2 %; and total registrants increased by 3.6 %, per Table 1. Mississippi, Louisiana, Alabama, Texas, Florida and Georgia held the top six spots in FY 2011/2012, per Tables 2 and 3. Canada had the most international registrants—37.0 % share in FY 2011; 34.2 % in FY 2012, per Tables 4 and 5.

### ***Welcome Center Reservation Service***

The Welcome Center Reservation Service enables travel counselors to make reservations for travelers/visitors in any hotel/motel, bed and breakfast, or campground that accepts those reservations. This Reservation Service completed its 18th year of operation in June 2012 with \$174,832 in revenue, 1,906 reservations and 2,282 room nights booked.

### **Regional Airport/Air Passenger Data**

Mississippi's Regional/International Airports reported 1,044,456 scheduled revenue passengers in FY 2012, a 4.6 % decrease versus FY 2011 revenue passengers. These Airports, plus Tunica County's Airport, had 88,484 total revenue charter flight enplanements in FY 2012, a 7.6 % increase compared to FY 2011 charter flight enplanements.

The Jackson-Medgar Wiley Evers International Airport enplaned 615,492 revenue passengers, or 58.9 %, of all FY 2012 passengers enplaned in Mississippi. Its 35 daily nonstop flights to cities and airports included Atlanta, Baltimore-Washington, Charlotte, Chicago, Dallas-Ft. Worth, Houston, Memphis, Orlando, and D.C. Jackson-Evers reported \$4.1 million in capital improvement projects in FY 2012. This airport is a vital cog for the state's air traffic activity. Gulfport-Biloxi's International Airport had 346,192 paid scheduled service enplanements in FY 2012. Their five carriers: ASA/Delta, American, Continental, Northwest and USAir. Cities served by the end of FY 2012: Atlanta, Charlotte, Dallas-Ft. Worth, Houston, Memphis, and Tampa. They cited \$8.2 million in FY 2012 capital expenditures and improvements.

FY 2012 charter flights: Gulfport-Biloxi—358 flights, 41,655 passenger enplanements with many cities in the mix: Austin, Houston, Kansas City, Orlando, St. Louis; Hattiesburg-Laurel—99 flights, 3,472 passengers; Golden Triangle—33 flights, 1,847 passengers; Tupelo—100 flights, 1,020 passengers.

Tunica County's Airport had 591 charter flight departures and 40,490 enplanements in FY 2012, with many U.S. cities such as Atlanta, Charlotte, Chicago, Detroit, Sarasota, and Tulsa, etc. Scheduled service, via Allegiant, included 67 flights with 1,845 passengers. Some \$708,760 in estimated net capital expenditures and improvements were made to this Airport in FY 2012.

### **Motor Coach Snapshot**

The FY 2012 snapshot featured feedback from five Tourism Partners, plus additional data gleaned from quarterly Welcome Center reports with Motor Coach registrant information. Estimated total passengers, including overnights, are roughly 640,000. Tour expenditures were an estimated \$62 million. Average tour expenditures = \$3,500, with a wide range. The 640,000 estimated group passengers were 3.0 % of 21.3 million estimated statewide visitors.

### **Amtrak**

Amtrak serves Mississippi with two long-distance trains: City of New Orleans (daily Chicago-New Orleans via Jackson); The Crescent (daily New Orleans-Atlanta-New York via Meridian). Ten Mississippi Stations with Amtrak include Brookhaven, Greenwood, Hattiesburg, Hazlehurst, Jackson, Laurel, McComb, Meridian, Picayune and Yazoo City. Total FY 2012 ridership in Mississippi was 115,581. The FY 2012 total U.S. ridership: 31.2 million. Ridership is the sum of total boardings and alightings (getting on-and-off the train).

**TABLE 1**

**ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY U.S. AND INTERNATIONAL TRAVELERS, FY 2011 AND FY 2012**

Origin	FY 2011 Registrants	FY 2012 Registrants	Percentage Change
States	1,951,717	2,019,035	3.4%
Countries	49,340	53,402	8.2%
Total	2,001,057	2,072,437	3.6%

NOTE: Tables 1-5 only reflect those visitors who completed the registration forms.  
SOURCE: Mississippi Development Authority Tourism Division, 2012.

**TABLE 2**  
**HIGHWAY WELCOME CENTER REGISTRANTS,**  
**TOP TEN STATES, FY 2011**

State	Registrants	Percentage of States	Percentage of Top Ten
Mississippi	346,844	17.8%	22.0%
Louisiana	278,798	14.3%	17.7%
Alabama	206,578	10.6%	13.1%
Texas	188,812	9.7%	12.0%
Florida	146,407	7.5%	9.3%
Georgia	118,415	6.1%	7.5%
Tennessee	107,113	5.5%	6.8%
Arkansas	79,276	4.1%	5.0%
Missouri	54,430	2.8%	3.5%
Illinois	50,010	2.6%	3.2%
Other	375,034	19.2%	NA
Total	1,951,717	100.0%	100.0%

SOURCE: Mississippi Development Authority Tourism Division, 2011.

**TABLE 3**  
**HIGHWAY WELCOME CENTER REGISTRANTS,**  
**TOP TEN STATES, FY 2012**

State	Registrants	Percentage of States	Percentage of Top Ten
Mississippi	336,521	16.7%	20.7%
Louisiana	320,589	15.9%	19.7%
Alabama	208,525	10.3%	12.8%
Texas	205,579	10.2%	12.7%
Florida	137,136	6.8%	8.4%
Georgia	113,764	5.6%	7.0%
Tennessee	111,273	5.5%	6.8%
Arkansas	81,135	4.0%	5.0%
Missouri	58,879	2.9%	3.6%
Illinois	51,212	2.5%	3.2%
Other	394,422	19.5%	NA
Total	2,019,035	100.0%	100.0%

SOURCE: Mississippi Development Authority Tourism Division, 2012.

**TABLE 4**  
**HIGHWAY WELCOME CENTERS REGISTRANTS,**  
**TOP TEN COUNTRIES, FY 2011**

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	18,263	37.0%	44.7%
England	6,040	12.2%	14.8%
Germany	5,343	10.8%	13.1%
Mexico	2,976	6.0%	7.3%
France	2,256	4.6%	5.5%
Australia	2,091	4.2%	5.1%
Holland	1,385	2.8%	3.4%
Denmark	1,323	2.7%	3.2%
Switzerland	705	1.4%	1.7%
Italy	475	1.0%	1.2%
Other	8,483	17.2%	NA
Total	49,340	100.0%	100.0%

SOURCE: Mississippi Development Authority Tourism Division, 2011.

**TABLE 5**  
**HIGHWAY WELCOME CENTER REGISTRANTS,**  
**TOP TEN COUNTRIES, FY 2012**

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	18,276	34.2%	41.6%
England	6,414	12.0%	14.6%
Germany	6,014	11.3%	13.7%
Australia	2,964	5.6%	6.8%
Mexico	2,926	5.5%	6.7%
France	2,857	5.3%	6.5%
Holland	1,732	3.2%	3.9%
Denmark	1,162	2.2%	2.6%
Switzerland	962	1.8%	2.2%
Italy	588	1.1%	1.3%
Other	9,507	17.8%	NA
Total	53,402	100.0%	100.0%

SOURCE: Mississippi Development Authority Tourism Division, 2012.

## **GAMING**

Mississippi had 29 state-licensed casinos as of June 30, 2012 versus 30 state-licensed casinos as of June 30, 2011, or - 3.3 %. There were 30 state-licensed casinos on February 28, 2013.

### ***Gaming Revenues***

Total FY 2012 state-licensed casino gross gaming revenues were \$2.29 billion. Some \$1.62 billion, or 71.0 %, were the estimated net traveler/visitor share. This \$1.62 billion was 26.4 % of the \$6.16 billion in statewide Travel and Tourism expenditures.

Mississippi's total gaming-related tax revenues: \$280 million in FY 2012 with \$188 million in state receipts and \$92 million for cities/counties. Travel and Tourism comprised an estimated \$133 million of \$188 million-state; and \$65 million of \$92 million-city/county. Travel and Tourism's portion: \$198 million or 70.7 % of the \$280 million in combined state and local gaming tax revenues. Of the \$188 million in state tax receipts, \$152 million, or 80.9 %, went into the General Fund; \$36 million, or 19.1 %, was diverted to MDOT. Travel and Tourism's portion of \$152 million in General Fund gaming dollars = \$107.9 million, or 71.0 %. The \$107.9 million = 26.8 % of Travel and Tourism's \$402 million contribution to the General Fund.

FY 2011/2012 state-licensed casino gross gaming revenue market share by Gaming Region—Northern, Central and Coastal—comprise Table 6. Table 7 includes the percentage change in gross gaming revenue by Regions between FY 2011/2012.

### ***Mississippi Gaming Commission (MGC) Quarterly Survey Trends***

Some 66.7 %, or 2/3, of all FY 2012 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per MGC data. Coahoma and Tunica County casinos in the Northern Region had 80.0 % of out-of-state patrons, due to Arkansas, Tennessee, Illinois, Missouri, Oklahoma, Alabama, and Georgia patrons. Around 27.7 % of the Central Region—Greenville, Natchez and Vicksburg—casino patrons came from out-of-state; e.g., Arkansas and Louisiana. And 71.5 % of Coastal Region casino patrons lived out-of-state; e.g., Louisiana, Florida, Alabama, Georgia and Texas.

State-licensed casinos plus their hotels contributed an FY 2012 payroll of \$741.1 million, down 0.6 % from FY 2011. FY 2012 advertising and promotional expenditures attributed to state-licensed casinos were \$93.5 million, a 20.5 % increase versus FY 2011. Casino hotel indicators, by three gaming regions, are in Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY 2011/2012 quarterly averages. State-licensed casino hotel rooms decreased from 12,266 (FY 2011) to 12,106 (FY 2012), or by - 1.3 %, from quarterly averages.

An estimated \$25.4 million in Tourism Capital Investment (TCI) for casinos/amenities were attributed to the state-licensed and other casinos and/or new development in FY 2012. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. and do not include land acquisition/gaming equipment, furniture & fixtures, or site prep.

### ***Gaming Employment***

FY 2012 quarterly casino employment data came from LMI/MGC quarterly surveys. They reflected 23,415 state-licensed casino employees plus their hotel employees. These 23,415 casino plus casino hotel jobs were 28.1 % of statewide 83,345 direct Travel and Tourism jobs.

### ***NonGaming Summary of Revenue for State-Licensed Casinos***

Room revenue at state-licensed casino hotels was \$241.7 million in FY 2012, \$5.3 million, or 2.3 % more than FY2011; food and beverage revenue accounted for \$422.2 million, a \$14.6 million jump, or + 3.6 % versus FY 2011. FY 2012 other nongaming revenue was \$122.8 million, or \$18.8 million over the \$104 million level in FY 2011, an 18.1 % increase. Dollar amounts are significant. Many lodging, food & beverage, other amenities/services are complimentary.

**TABLE 6**  
**GROSS GAMING REVENUE MARKET SHARE BY REGION, FY 2011 AND FY 2012**

Region	FY 2011 Gross Gaming Revenue	Percentage of FY 2011 Total	FY 2012 Gross Gaming Revenue	Percentage of FY 2012 Total
Coastal	\$1,115,542,322	48.6%	\$1,093,039,055	47.8%
Northern	847,016,879	36.9%	860,523,115	37.6%
Central	331,988,934	14.5%	335,138,541	14.6%
Total	\$2,294,548,135	100.0%	\$2,288,700,711	100.0%

NOTE: Table 6 and Table 7 reflect Gaming Revenue Region shares. Coastal revenues are for cities in Hancock and Harrison counties. Northern revenue reflect Coahoma County and Tunica County. Central revenues comprise cities in Adams, Warren and Washington counties. This is the case for Tables 6-9.

SOURCES: Mississippi Gaming Commission and the Department of Revenue, 2012.

**TABLE 7**  
**GROSS GAMING REVENUE PERCENTAGE CHANGE BY REGION, FY 2011 AND FY2012**

Region	FY 2011 Gross Gaming Revenue	FY 2012 Gross Gaming Revenue	Percentage Change
Coastal	\$1,115,542,322	\$1,093,039,055	-2.0%
Northern	847,016,879	860,523,115	1.6%
Central	331,988,934	335,138,541	0.9%
Total	\$2,294,548,135	\$2,288,700,711	-0.3%

SOURCES: Mississippi Gaming Commission and the Department of Revenue, 2012.

**TABLE 8**  
**SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2011**

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	9	5,569	83.1	\$75.15
Northern	12	5,882	72.7	50.74
Central	8	815	65.3	61.89
Total/Average	29	12,266	76.9	\$62.34

NOTE: Table 8 and Table 9 figures reflect fiscal year quarterly averages. A portion of the casino hotel rooms are traditionally comped. Thus, Revenue per Available Room (REV PAR) is complex to estimate.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2011-2012.

**TABLE 9****SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2012**

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	9	5,492	85.6	\$68.64
Northern	12	5,897	71.7	50.28
Central	7	717	72.0	58.40
Total/Average	28	12,106	78.6	\$60.01

NOTE: Table 8 and Table 9 figures reflect fiscal year quarterly averages. A portion of the casino hotel rooms are traditionally comped. Thus, Revenue per Available Room (REV PAR) is complex to estimate.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2011–2012.

**OUTDOOR RECREATION/GOLF**

Employment, payroll and revenue figures for the DWF&P, U.S. Army Corps of Engineers, Vicksburg's National Military Park, Natchez's National Historical Park, Natchez Trace Parkway, Corinth Civil War Interpretive Center and Brice's Crossroads National Battlefield Site are in Appendices A–C. Per the MDA Tourism Division's Program Manager—Outdoor Recreation Marketing: "The economic contribution of outdoor recreation is felt far and wide all across the state and its participant pockets are deep." Hunting, fishing and other wildlife-related activities entice visitors to many parts of Mississippi. These individuals/travel parties spend significant dollar amounts on food and lodging, transportation, other trip costs such as fuel, fishing and hunting equipment, auxiliary and special equipment.

Camping and RV Travel are also important to Mississippi's Travel and Tourism economy. A case in point: the Parks of the Pat Harrison Waterway District, with 601 Camp Sites throughout eight of their nine Parks. Total CY 2011 Parks visitation was 794,500. Table 10 has a breakdown of these Parks' visitation, number of cabins and camp sites for 2011. Table 11 includes the FY 2011 and FY 2012 DWF&P State Park visitation figures.

Per the FY 2012 Mississippi Visitor Profile Study (small sample size) Mississippi "golf travelers" were 59 years old (average age); spent 2.8 nights, on average, in Mississippi. Two-thirds (67%) of them were from Alabama, Arkansas, Louisiana, Mississippi or Tennessee.

The 3rd Mississippi Gulf Resort Classic, an official PGA TOUR Champions Tour Event, was held March 19–25, 2012, at Fallen Oak. The tournament budget was \$4.3 million. The 82 pros, corporate sponsors, media, caddies, Golf Channel production team spent \$274,300 just for lodging. They spent \$507,000 for rental cars, off-site meals, taxi fares, gas, entertainment, miscellaneous travel expenses. Total Sponsor Total Operating Revenue was about \$3.7 million.

**TABLE 10**  
**PAT HARRISON WATERWAY DISTRICT DATA, CY 2011**

Park	Visitation	Cabins	Camp Sites
Archusa Creek Water Park, Quitman	79,000	4	69
Big Creek Water Park, Soso	80,000	4	48
Dry Creek Water Park, Mt. Olive	17,000	0	28
Dunn's Falls Water Park, Enterprise	7,500	1	0
Flint Creek Water Park, Wiggins	250,000	46	152
Little Black Creek Water Park, Lumberton	150,000	20	108
Maynor Creek Water Park, Waynesboro	78,000	9	69
Okatibbee Water Park, Meridian	85,000	4	105
Turkey Creek Water Park, Decatur	48,000	3	22
Total	794,500	91	601

SOURCE: Pat Harrison Waterway District, Administrative Office, Hattiesburg, 2012.

**TABLE 11****STATE PARK VISITATION, FY 2011/FY 2012**

Park	FY 2011 Visits	FY 2012 Visits	Change
Buccaneer State Park	39,262	60,985	55.3%
Clark Creek	8,399	15,454	84.0%
Clarkco	63,286	51,036	-19.4%
George P. Cossar	41,711	30,921	-25.9%
Golden Memorial	13,706	2,586	-81.1%
Great River Road	8,136	none reported	NA
Holmes County	37,900	11,432	-69.8%
Hugh White	60,385	15,224	-74.8%
J.P. Coleman	93,520	52,948	-43.4%
John W. Kyle	64,162	18,283	-71.5%
Lake Lincoln	49,055	58,305	18.9%
Lake Lowndes	103,121	57,000	-44.7%
LeFleur's Bluff	95,447	56,259	-41.1%
Legion	22,937	9,144	-60.1%
Leroy Percy	15,786	13,633	-13.6%
Natchez	25,313	29,075	14.9%
Paul B. Johnson	139,510	123,620	-11.4%
Percy Quin	74,137	146,929	98.2%
Roosevelt	85,603	89,563	4.6%
Shepard	9,103	24,429	168.4%
Tishomingo	55,384	56,842	2.6%
Tombigbee	28,456	24,371	-14.4%
Trace	73,848	138,956	88.2%
Wall Doxey	48,706	38,013	-22.0%
Total	1,256,873	1,125,008	-10.5%

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2012.

## THE BROADER VIEW AND ECONOMIC DEVELOPMENT

MDA Tourism Division's Research Program successfully worked on the "Broader View" project—an effort to estimate Travel and Tourism's portion of the broader state economy in Gross Domestic Product (GDP), employment, General Fund revenues, construction activity, and other areas—since 2000. Mississippi's economy without Travel and Tourism, if other sectors stayed constant: \$402 million less in General Fund Revenues; 116,480 fewer total jobs [direct, indirect, induced]; \$2.8 billion less in total annual payroll associated with this industry; quality of life issues, etc. Most of the direct and indirect Travel and Tourism jobs cannot be outsourced.

### ***State Gross Domestic Product, Total Value Added and State-level Travel and Tourism Accounts***

The State Gross Domestic Product (State GDP)—part of the national GDP—is a comprehensive measure of economic output used by all 50 states, D.C. and U.S. territories. Travel and Tourism’s share of GDP can be estimated via State Travel and Tourism Accounts, a broader view system focusing on the circular flow of goods and services in the state’s economy between Tourism Industry Supply and the impact of Tourism Commodity Demand.

MDA Tourism Division’s Research Program estimates Travel and Tourism’s statewide contribution—industry as a direct and total percentage of State GDP. Other indicators are the indirect and induced share of Travel and Tourism Employment and Labor Income, leakage, effective tax rates for personal income tax, sales tax, other taxes, among other indicators.

The direct, indirect and induced effects of Direct and Total Value Added from Mississippi’s statewide Travel and Tourism data were matched to their IMPLAN description, for gasoline stations, food services and drinking places, lodging, and other codes. The result was Travel and Tourism’s Direct and Total Value Added as a percentage of the state total. Mississippi’s GDP was about \$99 billion in FY 2012 based on actual CY 2011 and preliminary CY 2012 data. Travel and Tourism’s 2.7 % direct value added, and 4.0 % total value added, to GDP is lower than its 7.7 % direct Employment concentration, and its 8.4 % share of General Fund Revenues. Direct portion only of FY 2012 Total Value Added to expenditures shows 43 cents out of each Travel and Tourism Dollar spent eventually stays in Mississippi.

The direct only portion of food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation, and transportation were part of the Travel and Tourism Industry GDP. Casino gaming, food services and drinking places, and lodging were a major portion of this Industry GDP in FY 2012. Its composite nature needs to be emphasized.

Mississippi’s economy had a 9.0 % unemployment rate based on a 12-month moving average, January–December 2012, versus 10.4 % for January–December 2011. The civilian labor force was 1.34 million, with an average of 120,600 unemployed persons. Metropolitan Statistical Areas (MSAs) for counties with significant Travel and Tourism activity had these unemployment rates: 8.4 % for Gulfport–Biloxi (Hancock, Harrison and Stone counties); 9.4 % for Pascagoula (Jackson and George counties); 7.8 % for Hattiesburg (Forrest, Lamar and Perry counties); and 7.3 % for Jackson (Copiah, Hinds, Madison, Rankin and Simpson counties). The Gulfport–Biloxi and Pascagoula consolidated MSA had an 8.8 % unemployment rate. DeSoto County’s unemployment rate was 6.8 %; Tunica County’s was 14.9 % (both in Memphis’ MSA).

### ***Travel and Tourism Employment Multipliers (Indirect & Induced)***

IMPLAN includes indirect (business or firm level) and induced (personal or individual level) multipliers. Together—direct + indirect + induced divided by the direct contribution—they estimate the employment multiplier filtered through a Social Accounting Matrix (SAM). FY 2011 and 2012 Employment Multipliers for Mississippi were 1.39 and 1.4, respectively. The 82,000 estimated statewide direct FY 2011 Travel and Tourism jobs resulted in an additional 31,885 indirect plus induced jobs. Some 83,345 statewide direct Travel and Tourism jobs in FY 2012 resulted in an additional 33,135 indirect plus induced jobs. Total FY 2012 jobs associated with Travel and Tourism were 116,480, or 10.7 % of statewide nonfarm employment. FY 2012 Employment multipliers varied—1.61 for lodging, 1.25 for food services and drinking places.

### ***Travel and Tourism Labor Income Multipliers (Indirect & Induced)***

Payroll or labor income earned by an employee results in additional money spent by the firm (indirect) and individual (induced). FY 2011 Travel and Tourism Labor Income Multiplier for Mississippi was 1.6: Total labor income of \$2.83 billion—\$1.77 billion (direct) and \$1.06 billion (indirect/induced). Mississippi’s FY 2012 Travel and Tourism Labor Income Multiplier was 1.53 based on \$1.83 billion (direct), \$975 million (indirect and induced) and Total labor income of \$2.8 billion. IMPLAN codes were used to compute all Employment and Labor Income Multipliers.

### ***Travel and Tourism Exports and Imports***

Travel and Tourism is one of Mississippi's largest export industries, generating economic benefits across all parts of the state that directly affect the entire state. Mississippi's net balance of Travel and Tourism Trade, defined as Travel and Tourism Exports (expenditures from out-of-state visitors in Mississippi) minus Travel and Tourism Imports (expenditures out of Mississippi by in-state residents), minus leakage—money eventually leaving the state from out-of-state visitor spending surplus in Mississippi—was positive, or a surplus.

Out-of-state visitors spent an estimated \$5.24 billion in Mississippi, 85.1 % of the \$6.16 billion spent by visitors in FY 2012. Mississippians traveling within the state—50 miles or more, one-way—spent an estimated \$920 million on their in-state trips, or 14.9 % of the \$6.16 billion spent in Mississippi. Mississippians spent an estimated \$2.8 billion traveling out-of-state.

### ***Estimated Effective Tax Rates***

The Center for Policy Research and Planning, Mississippi IHL, estimates total additions to the General Fund, by tax bracket. MDA Tourism Division Research estimates Travel and Tourism-related dollars from personal income taxes, sales taxes and all other taxes, which go to the General Fund. An estimated \$102 million in Travel and Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2012, or + 3.2 % over FY 2011.

### ***Employment Rankings and Trends***

Travel and Tourism ranked 4th in total estimated private FY 2012 direct nonfarm, establishment-based employment, behind Manufacturing, Health Care and Social Assistance, and Retail Trade. Most of the direct FY 2012 Travel and Tourism jobs—81,200 of the 83,345 statewide direct Travel and Tourism jobs—or 97.4 %—were private sector ones (hotels/motels, restaurants, casinos, recreation, etc.). The other 2,145, or 2.6 %, were held by employees in state parks, federal parks, private outdoor recreation, airports, historic sites, state/local Tourism offices, museums, performing arts centers and some spectator sports sites.

Mississippi's 83,345 statewide direct Travel and Tourism jobs in FY 2012 equaled 7.7 % of all establishment-based nonfarm jobs, per Appendix F. The 82,000 statewide direct Travel and Tourism jobs in FY 2011 were 7.5 % of all jobs, per Appendix E. Nonfarm employment rankings reflect sectors, per their definition on page 28. Table 12 is Mississippi's FY 2012 nonfarm, establishment-based employment rankings by the top major industry "sectors." About 82 % of Mississippi's nonfarm workers are employed in service-providing industries; the other 18 % works in manufacturing, construction and natural resources/mining.

Mississippi had 85,300 direct Travel and Tourism jobs in FY 2007, compared to 83,345 in FY 2012, or 1,955 fewer direct jobs for FY 2012 versus FY 2007. The state's unemployment rate would skyrocket to about 15.3 % IF all 83,345 direct Travel and Tourism jobs were eliminated. It is anticipated that Travel and Tourism employment will grow long-term, but this could be slow growth over the next five years, e.g., 1.0 % - 1.4 % per year. Direct Travel and Tourism jobs in Mississippi increased by about + 1.7 % annually—on average—during an 18-year time frame between FY 1994 and FY 2012. This factors in up-and-down economic cycles.

Travel and Tourism was the top private sector employer in three states: Hawaii, Nevada and Wyoming; number two in Washington, D.C.; third largest private sector employer in Florida, Michigan and New Mexico. Eight states, including Mississippi, featured Travel and Tourism as that state's fourth largest private sector employer, per Table 13. This industry ranked 5th–12th in 35 of the 50 states in private sector employment, per the U.S. Travel Association, August 2012.

**TABLE 12****MISSISSIPPI NONFARM ESTABLISHMENT-BASED EMPLOYMENT RANKINGS, DIRECT JOBS, TOP SECTORS, FY 2012**

Sector	FY 2012 Establishment Based Employment	FY 2012 Employment Percentage	FY 2012 Private Sector Rank
Manufacturing (1)	134,460	12.3%	1
Health Care and Social Assistance--private (2)	123,250	11.3%	2
Retail Trade (3)	122,345	11.3%	3
Travel and Tourism (4)	83,345	7.7%	4
Administrative Support and Waste Management	52,660	4.8%	5
Accommodation and Food Services (5)	49,690	4.6%	6
Construction (6)	45,765	4.2%	7
Transportation & Warehousing (7)	38,330	3.5%	8
Other Services (8)	34,120	3.1%	9
Finance and Insurance	33,490	3.1%	10
Wholesale Trade	33,010	3.0%	11
Professional, Scientific and Technical Services (9)	29,950	2.7%	12
Education Services	13,390	1.2%	13
Information (10)	11,585	1.1%	14
Real Estate and Rental (11)	10,730	0.9%	15
Management of Companies	10,085	0.9%	16
Mining and Logging	9,260	0.9%	17
Utilities	7,825	0.7%	18
Arts, Entertainment and Recreation (12)	1,250	0.1%	19
Government (13)	244,600	22.5%	NA
Total Statewide Nonfarm Direct Employment	1,089,140	100.0%	NA

1. Durable goods comprised 87,700 jobs, or 65.2 % of Manufacturing jobs.
2. Does not include any public sector Health Care jobs. Those are included under Government.
3. Does not include an estimated 9,620 Travel and Tourism jobs directly related to Retail Trade.
4. Includes Accommodations, Food Services, Amusement, Arts, Entertainment, state-licensed Casino Gaming and Recreation, Transportation, Tourism Construction, among other jobs. A portion of these jobs are not directly related to Travel and Tourism, based on the definition of a Traveler/Visitor on page 28. Those jobs not directly related to Travel and Tourism are included in the Accommodations and Food Services; Arts, Entertainment & Recreation Sectors. Appendix A includes the direct FY 2012 statewide Travel and Tourism jobs. Travel and Tourism: state's 4th largest Private Sector Employer.
5. Reflects the employment not directly related to Travel and Tourism.
6. Excludes Travel and Tourism-related Construction.
7. Excludes Travel and Tourism-related Scheduled Passenger and Non-Scheduled Charter Air Transportation; Interurban & Rural Bus Transportation; Taxi, Limousine Service, Charter Bus; Scenic & Sightseeing Transportation; Support Activities for Air Transportation.
8. Excludes Travel and Tourism-related Laundry Services and Parking Lots and Garages.
9. Excludes Travel and Tourism-related Advertising and Travel Arrangement & Reservation Services.
10. Excludes Motion Picture & Video Production and Motion Picture Theaters related to Travel and Tourism.
11. Excludes Travel and Tourism-related Residential Property Managers and Passenger Car Rentals.
12. Includes non-Travel and Tourism employment.
13. Excludes an estimated 2,145 Travel and Tourism jobs funded by public monies--State Tourism Office, personnel at Regional/International Airports, Museums, Historical Sights, Performing Arts, State Parks, etc. It includes all public sector employment--Health Care, Education, etc. Government is a Super Sector.

SOURCES: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2012.

**TABLE 13****TRAVEL INDUSTRY EMPLOYMENT RANKING: 50 STATES AND D.C.**

First, Second, or Third U.S. Private Sector Employer	Fourth, Fifth, or Sixth U.S. Private Sector Employer	Seventh, Eighth, or Ninth U.S. Private Sector Employer	Tenth, Eleventh, or Twelfth U.S. Private Sector Employer
Hawaii (1)	Arkansas (4)	Illinois (7)	Indiana (10)
Nevada (1)	Arizona (4)	Nebraska (7)	Ohio (10)
Wyoming (1)	Colorado (4)	Alabama (8)	Pennsylvania (10)
Washington, D.C. (2)	<b>Mississippi (4)</b>	Iowa (8)	Massachusetts (11)
Alaska (3)	Montana (4)	Kansas (8)	Washington (11)
Florida (3)	South Dakota (4)	Maryland (8)	Rhode Island (12)
New Mexico (3)	Utah (4)	Michigan (8)	
North Dakota (3)	Vermont (4)	Missouri (8)	
	Georgia (5)	New Jersey (8)	
	Maine (5)	Texas (8)	
	South Carolina (5)	West Virginia (8)	
	Virginia (5)	Wisconsin (8)	
	California (6)	Connecticut (9)	
	Kentucky (6)	Delaware (9)	
	Louisiana (6)	Idaho (9)	
	Minnesota (6)	New Hampshire (9)	
	New York (6)		
	North Carolina (6)		
	Oklahoma (6)		
	Oregon (6)		
	Tennessee (6)		

NOTE: Rankings were based on the proportion of private sector Travel jobs as a percentage of statewide totals (not on the absolute number of Travel jobs).

SOURCE: Travel Means Jobs, U.S. Travel Association, August 2012.

**LOCAL LEVEL INDICATORS**

Local Travel and Tourism indicators include economic contribution from hotel/motel tax levies and restaurant taxes collected, petroleum tax distribution, motor vehicle rental tax diversions, alcohol beverage control (ABC), seawall taxes, real and personal property taxes paid by hotels/motels, restaurants and casinos, and TCI permit fees.

***Taxes/Fees Returned to Cities/Counties Attributed to Travel and Tourism***

Travel and Tourism's contribution to the local economy includes City/County tax revenues and permit fees. About \$65 million or 38.4 % of the estimated \$169.2 million in City/County taxes/fees attributed to Travel and Tourism came from state-licensed casino city/county tax revenue portion of gross gaming revenues. Another \$104.2 million, or 61.6 %, were from Room/Restaurant special tax revenues, hotel/motel real and personal property taxes including some casino hotels/other hotels, restaurants, Seawall Taxes for coastal counties, ABC permit license fees, petroleum taxes, motor vehicle rentals and TCI permit fees.

MDA Tourism Division's Research Unit tracks the estimated portion of the state sales tax returned to cities attributed to Travel and Tourism, from the 18.5 % of the 7.0 % state sales tax. FY 2012 tabulations were made for nearly 300 municipalities. It's estimated that \$45.2 million statewide attributed to Travel and Tourism [from the 18.5 % of the 7.0 % state sales tax] went into the city General Fund for all municipalities. City data are not published, but kept in working paper/e-format. These monies originate at the state tax level and go into the city's General Fund.

Room/Restaurant tax percentages range from 1 % to 5 %. Tables 14/15 have FY 2011/12 tax percentages by locality, plus gross Travel and Tourism special tax revenue. Some \$40.4 million, or 68 %, of gross FY 2012 special tax revenues were from restaurant sales, with \$19.2 million, or 32 %, from lodging sales. Special gross FY 2012 tax revenues equaled \$59.6 million.

### ***County Travel and Tourism Expenditures/Employment and Hotel/Motel Room Data***

FY 2011/2012 Travel and Tourism expenditures by visitors, employment data for the 82 counties, Travel and Tourism employment percentage, state/local taxes attributed to Travel and Tourism, and TCI are in Appendices E and F. Mississippi had 667 total hotel/motel properties as of June 30, 2012, per a countywide lodging census conducted by MDA Tourism Division, and using STR data. The number of statewide hotel/motel rooms decreased from 57,451 as of June 30, 2011, to 56,897 as of June 30, 2012, or by -1.0 percent per Appendix G. An estimated 960 new statewide hotel/motel rooms were under construction: July 2012-March 2013, or 1.7 % over June 2012 inventory levels. Mississippi's inventory included an estimated 158 Bed & Breakfasts (B & B's) as of June 30, 2012, with 800 total B & B rooms, 743 cabin rooms, 1,445 condo/timeshare rooms, 14,675 recreational vehicle (RV) spaces with electricity and water, 1,741 camp sites without hook-up.

FY 2012 statewide average daily rate (ADR), based on STR was \$76.84. Mississippi's FY 2012 statewide occupancy percent was 55.9 using STR data for corporate & franchise properties. State-licensed casino hotels had a 78.6 occupancy percent, much higher than STR data, per Table 9, but many were comped. Their ADR was \$60.01. State-licensed casino hotel rooms totaled 12,204 as of June 30, 2012, or 21.4 %, of 56,897 statewide hotel/motel rooms.

### ***Travel and Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY 2012***

Twenty-eight Tourism Partners—CVB's, Tourism Commissions, Partnerships—received FY 2012 Advertising and Employment/Payroll mini-surveys for October 2011 – September 2012. Twenty-three, or 82.1 %, responded. Most CVB's furnished complete data.

FY 2012 Travel and Tourism Employment/Payroll data reflected 153 full-time equivalent staff with \$7.9 million in salaries, wages and fringe benefits. The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category. These respondents—as a whole—reflected a total estimated FY 2012 Tourism Budget of \$24.2 million.

The FY 2012 Advertising summary indicated nearly \$11 million were spent by the respondents, with about \$5.8 million, or 52.8 %, on Ad Placement and Production. Respondents also spent: \$628,321 in Ad Agency retainer fees, \$360,716 for Promotional items, \$328,461 for Trade Show Participation costs, \$96,626 for FAM Tours, \$258,642 for Billboard Advertising, \$579,160 for Brochure, Collateral and Other Printing, \$2,338,283 in Sponsorships and Local Events, \$572,850 for web site maintenance; and a small amount from all Grant Programs.

## **STATEWIDE TRAVEL AND TOURISM LINKS**

### ***Film Productions, Documentaries and Commercials***

Since its creation in 2004, the Mississippi Motion Picture Incentive Program has been successful in supporting the development of local production and attracting nationally recognized film production. During the 2011 Legislative Session, the Program was improved by 5%, making it one of the best in the nation. The low minimum spend of \$50,000, the lowest in the country for a rebate, is suited to smaller projects and local producers. The program now includes a 25 % rebate for all local spend and for the wages of non-resident cast and crew, with an additional 5% rebate added for the wages of Mississippi resident cast and crew. Along with the established tax reductions, the Mississippi program is especially attractive to independent producers.

Incentives and work force training are essential elements in realizing the vision outlined in the groundbreaking 2003 Mississippi Film Office Agenda for the future of the film industry in Mississippi. The Agenda focuses the attention on incentives for both Hollywood and local production, seeks the creation of film industry training programs, and outlines the development of film funding for Mississippi production. Launching the Mississippi Work Force Training curriculum in August 2011, Mississippi took two giant steps forward as a Southern production center, seeking to attract out-of-state production and to develop Mississippi filmmakers. A second offering of courses began at Hinds Community College in August 2012.

In FY 2012, the Mississippi Film Office coordinated the activities of more than a dozen productions, including feature films, documentaries, television, short films, and commercials. While each project created direct economic contribution and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up, and location fees all add to the total impact of filming on location. Every corner of the state saw production activity, as numerous documentaries, regional commercials, television episodes, and short films were located around the state. Greenville hosted the independent thriller *Haunted*; Natchez became the setting for the Civil War era vampire film *Rise Again*; the first season of the History Channel's *Full Metal Jousting* was shot on location near Clinton; episodes of *Bizarre Foods* and *Appetite for Life* traveled throughout the state while a new show for the History Channel, *Picked Off*, focused its' efforts on the Gulf Coast. Numerous local filmmakers launched filmmaking efforts in their respective communities all over the state including Tupelo, Oxford, Hattiesburg, and Canton.

The Mississippi Film Office again sponsored statewide film festivals and related events through incentive grants and support. Additionally, it directly supported indigenous filmmaking by continuing to fund the Mississippi Emerging Filmmakers Grant program administered by the Mississippi Film and Video Alliance and supporting the efforts of Barefoot Documentary Workshops. The inaugural Table Read Mississippi took place in Jackson supporting Mississippi writers, producers, and actors. Additional Table Read events are being planned for other areas of the state.

### ***Selected State Agencies with Travel and Tourism Links: FY 2012 Operations Mini-Surveys***

State agencies—Mississippi Arts Commission (MAC), Mississippi Gaming Commission (MGC), and others—furnished major objects of expenditure data. These mini-surveys estimated a portion of Tourism's "Government Expenditures", a complementary component to Tourism Capital Investment (TCI) and travel expenditures. FY 2012 (state) Government Expenditures were \$31.5 million, excluding road construction, Welcome Center and Rest Area maintenance.

The MAC reported \$254,791 in contractual services, and \$1,532,635 in subsidies, loans and grants. MGC spent \$1,979,700 for contractual services plus \$100,300 in subsidies, loans and grants. The Mississippi Department of Marine Resources reported \$2,207,523 in Contractual Services and \$12,712,587 in subsidies, loans and grants. Our Pearl River Basin Development District had \$124,347 for contractual; \$308,086 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget: \$3,419,416 for contractual, plus \$1,690,000 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences had \$251,315 for contractual services and \$419,164 for subsidies, loans and grants. During the 2011 Legislative Session the Mississippi Legislature appropriated \$6,462,000 for the purpose of providing funds for Tourism Advertising and Promotion, for the fiscal year beginning July 1, 2011 and ending June 30, 2012. The Mississippi Department of Transportation (MDOT) spent \$5,903,256 to maintain Welcome Centers and Rest Areas, including contract and routine expenses, part of TCI.

### ***Visitor Profile Study, FY 2012***

Some 21.3 million estimated total visitors in FY 2012—all domestic leisure plus all business plus other personal plus all group travel plus international visitors—overnight in, or did a day trip to Mississippi, or + 2.4 % versus 20.8 million in FY 2011. Sources were the TNS FY 2012 Visitor Profile study; Mississippi Gaming Commission (MGC) quarterly surveys—patrons by state of origin and occupancy rates for state-licensed casino hotels; Smith Travel Research (STR) surveys; Mississippi Highway Welcome Center registration data; State Park visitation; among other sources.

TNS, domestic visitation data provider, cited 83 % as leisure travelers, or tourists; 8 % business; and 8 % personal business/other in FY 2012. Seventy-three (73) % of all visitors were from out-of-state. About 65 % of all visitors overnights. Some 82 % (over four-fifths) of all FY 2012 overnight leisure visitors came from eight states—Mississippi (27 %), Louisiana (13 %), Alabama (10 %), Tennessee (9 %), Texas (7 %), Florida (6 %), Georgia (5 %) and Arkansas (5 %). Top six origin Designated Market Areas (DMAs) were Memphis, Jackson (Mississippi), New Orleans, Mobile/Pensacola, Birmingham and Atlanta.

Average annual household income for all Mississippi visitors was \$66,200; average age was 52. Average travel party size was 3.6 persons, with 2.7 nights spent in Mississippi. Mississippi residents spent 2.3 nights while non-residents spent 2.8 nights in the state. About 44 % traveled in pairs. Another 20 % traveled with children. Only 5 % of all visitors arrived by air. Vacation activity niche characteristics varied, with casino gamers the largest market.

### ***Ad Effectiveness Study, FY 2012***

MDA Tourism Division posted favorable results from its FY 2012 advertising campaign, based on results from the May 2012 ad effectiveness study. The on-line survey included leisure travelers from: Mississippi; border states (Alabama, Arkansas, Louisiana, Tennessee), including these Destination Marketing Areas (DMA's): Baton Rouge, Monroe–El Dorado, Shreveport–Bossier City, Memphis, Nashville, Birmingham–Tuscaloosa–Gadsden, and Montgomery; plus Florida, Georgia, Missouri, North and South Carolina, Texas.

About 18 % of the respondents recalled at least one of the MDA Tourism Division ads, based on 2,258 completed e-surveys. Mississippi residents comprised 13 % of total visitation; four border states accounted for 41 %; the other six states for 46 % of visitation. Average age of the visitors was 57; their household income was \$71,100. Magazine advertising seemed effective (20 % recalled a print ad). Fewer travelers, compared to magazine ads, recalled the Internet ads. In markets where TV commercials aired, about a third recognized these ads. Radio ads were prevalent within the in-state (Mississippi) market.

Length-of-stay climbed with increasing travel distance: 2.4 nights for Mississippi residents; 2.8 nights for the border states; and 3.1 nights for those from the “further-out” states. Travel party size was between 2-and-3. Two-thirds of those who recognized Mississippi ads had already decided to visit. Of the remainder (one-third), the ads influenced 47 % to either decide to make the trip or to extend their stay. Spending per trip was \$822 (travel party data), resulting in \$215.2 million spent in Mississippi. This resulted in an estimated \$12.9 million: General Fund Revenues and a Return on Investment (ROI) of \$6.46 to \$1, based on Domestic Consumer Ad Dollars spent. Nearly 3,000 direct Travel and Tourism jobs and another 1,200 indirect and induced (spin-off) jobs were supported by the \$215.2 million in traveler expenditures.

**TABLE 14**

**ROOM/RESTAURANT GROSS SPECIAL TAX REVENUE BY TOURISM OFFICE, FY 2011**

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2011 Room Tax Revenue	Gross FY 2011 Restaurant Tax Revenue	Gross FY 2011 Total Tax Revenue
Aberdeen	1.0	1.0	\$6,521	\$65,491	\$72,012
Baldwyn	None	2.0	None	116,575	116,575
Batesville	3.0	3.0	195,000	819,364	1,014,364
Bay Springs	3.0	None	6,125	None	6,125
Canton	2.0	2.0	97,352	391,481	488,833
Cleveland	2.0	2.0	105,325	566,072	671,397
Clinton	2.0	None	107,304	None	107,304
Coahoma County	2.0	1.0	73,870	258,004	331,874

Table 14 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2011 Room Tax Revenue	Gross FY 2011 Restaurant Tax Revenue	Gross FY 2011 Total Tax Revenue
Columbus-Lowndes	2.0	2.0	260,795	1,390,952	1,651,747
Como^	\$1 per night	2.0	5,031	30,400	35,431
Corinth	2.0	2.0	90,627	920,918	1,011,545
DeSoto County	2.0	2.0	850,000	4,956,902	5,806,902
Florence	None	2.0	None	164,362	164,362
Flowood	None	2.0	None	1,784,685	1,784,685
Greenwood	1.0	1.0	97,448	334,688	432,136
Grenada	2.0	1.0	95,787	300,989	396,776
Hancock County	2.0	None	93,966	None	93,966
Harrison County	5.0	None	6,160,414	None	6,160,414
Hattiesburg	2.0	2.0	433,302	4,230,106	4,663,408
Hernando	1.0	None	9,947	None	9,947
Holly Springs	2.0	2.0	21,456	232,484	253,940
Horn Lake	1.5	None	97,299	None	97,299
Indianola	2.0	2.0	31,215	311,555	342,770
Jackson (city)*	4.0	2.0	2,898,069	4,576,871	7,474,940
Kosciusko	2.0	None	30,150	None	30,150
Lauderdale County	2.5	None	676,399	None	676,399
Laurel	2.0	2.0	166,568	1,136,931	1,303,499
Magee	1.0	1.0	22,702	206,857	229,559
Montgomery County	2.0	None	34,281	None	34,281
Moss Point	3.0	None	417,064	None	417,064
Natchez#	3.0 plus \$2	1.5	744,043	647,123	1,391,166
New Albany	2.0	2.0	70,967	467,020	537,987
Newton	\$1/room night	None	10,999	None	10,999
Ocean Springs	2.0	2.0	28,527	993,593	1,022,120
Oxford	2.0	2.0	186,990	1,755,314	1,942,304
Pascagoula	3.0	None	93,730	None	93,730
Pearl	None	2.0	None	587,619	587,619
Philadelphia	3.0	None	89,718	None	89,718
Picayune	2.0	1.0	51,615	383,149	434,764
Pontotoc	2.0	2.0	7,763	291,518	299,281
Rankin County	2.0	None	690,550	None	690,550
Richland	None	2.0	None	296,392	296,392
Ridgeland	1.0	1.0	259,255	1,060,457	1,319,712
Ripley	2.0	2.0	10,598	225,870	236,468
Sardis	3.0	3.0	16,320	82,746	99,066
Southaven	1.0	1.0	211,168	None	211,168
Starkville	2.0	2.0	160,483	1,411,685	1,572,168

Table 14 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2011 Room Tax Revenue	Gross FY 2011 Restaurant Tax Revenue	Gross FY 2011 Total Tax Revenue
Stone County	2.0	2.0	23,018	310,421	333,439
Tishomingo County	2.0	None	15,383	None	15,383
Tunica County	3.0	3.0	576,603	1,467,532	2,044,135
Tupelo	2.0	2.0	407,827	2,964,996	3,372,823
Vicksburg	3.0	1.0	651,438	753,488	1,404,926
Washington County	1.0	1.0	125,554	480,770	606,324
West Point	1.0	1.0	29,596	185,933	215,529
Yazoo County	2.0	2.0	49,372	338,381	387,753
Total			\$17,595,534	\$37,499,694	\$55,095,228

NOTE: Tourism Offices include CVBs, Convention and Visitor Councils, Tourism Associations, Tourism Commissions, Tourism Councils, Cities/Counties and Chambers.  
A portion of these gross revenues are attributed to locals.

# A 3.0 % city lodging tax plus a flat occupancy tax of \$2 per occupied room, per night.

^ Como began collecting this special lodging and restaurant tax in FY 2011 (February 2011).

\* Includes a 75 cents per night charge per occupied room.

SOURCE: Department of Revenue, 2011.

**TABLE 15**  
**ROOM/RESTAURANT GROSS SPECIAL TAX REVENUE**  
**BY TOURISM OFFICE, FY2012**

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2012 Room Tax Revenue	Gross FY 2012 Restaurant Tax Revenue	Gross FY 2012 Total Tax Revenue
Aberdeen	1.0	1.0	\$5,500	\$66,754	\$72,254
Baldwyn	None	2.0	None	126,233	126,233
Batesville	3.0	3.0	201,166	874,700	1,075,866
Bay Springs	3.0	None	4,755	None	4,755
Canton	2.0	2.0	120,819	435,322	556,141
Cleveland	2.0	2.0	109,770	586,889	696,659
Clinton	2.0	None	126,702	None	126,702
Coahoma County	2.0	1.0	72,886	271,338	344,224
Columbus-Lowndes	2.0	2.0	282,230	1,576,761	1,858,991
Como	\$1 per night	2.0	5,000	46,066	51,066
Corinth	2.0	2.0	93,436	955,474	1,048,910
DeSoto County	2.0	2.0	937,600	5,384,731	6,322,331
Florence	None	2.0	None	191,644	191,644
Flowood	None	2.0	None	1,976,634	1,976,634
Greenwood	1.0	1.0	95,093	344,728	439,821
Grenada	2.0	1.0	162,504	332,767	495,271

Table 15 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2012 Room Tax Revenue	Gross FY 2012 Restaurant Tax Revenue	Gross FY 2012 Total Tax Revenue
Hancock County	2.0	None	85,401	None	85,401
Harrison County	5.0	None	6,134,120	None	6,134,120
Hattiesburg	2.0	2.0	473,855	4,459,492	4,933,347
Hernando	1.0	None	5,377	None	5,377
Holly Springs	2.0	2.0	21,450	239,355	260,805
Horn Lake	\$2/room night	None	91,785	None	91,785
Indianola	2.0	2.0	33,620	319,008	352,628
Jackson (city)*	4.0	2.0	3,714,558	4,211,668	7,926,226
Kosciusko	2.0	None	29,176	None	29,176
Lauderdale County	2.5	None	655,149	None	655,149
Laurel	2.0	2.0	166,452	1,210,659	1,377,111
Magee	1.0	1.0	23,237	223,103	246,340
McComb^	3.0	None	180,299	None	180,299
Montgomery County	2.0	None	36,525	None	36,525
Moss Point	3.0	None	311,098	None	311,098
Natchez#	3.0 plus \$2	1.5	743,629	666,555	1,410,184
New Albany	2.0	2.0	71,500	486,351	557,851
Newton	\$1/room night	None	9,864	None	9,864
Ocean Springs	2.0	2.0	27,450	1,007,728	1,035,178
Oxford	2.0	2.0	219,634	1,975,383	2,195,017
Pascagoula	3.0	None	64,501	None	64,501
Pearl	None	2.0	None	975,762	975,762
Philadelphia	3.0	None	96,820	None	96,820
Picayune	2.0	1.0	59,122	392,514	451,636
Pontotoc	2.0	2.0	7,872	325,152	333,024
Rankin County	2.0	None	725,325	None	725,325
Richland	None	2.0	None	326,996	326,996
Ridgeland	1.0	1.0	275,518	1,121,407	1,396,925
Ripley	2.0	2.0	11,532	248,178	259,710
Sardis	3.0	3.0	15,478	80,604	96,082
Southaven!	1.0	1.0	224,035	414,811	638,846
Starkville	2.0	2.0	183,485	1,509,627	1,693,112
Stone County	2.0	2.0	32,504	314,934	347,438
Tishomingo County	2.0	None	16,370	None	16,370
Tunica County	3.0	3.0	589,422	1,516,720	2,106,142
Tupelo	2.0	2.0	461,213	3,241,984	3,703,197
Vicksburg	3.0	1.0	888,555	904,193	1,792,748
Washington County >	3.0	1.0	215,860	469,098	684,958
West Point	1.0	1.0	30,485	203,608	234,093

Table 15 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2012 Room Tax Revenue	Gross FY 2012 Restaurant Tax Revenue	Gross FY 2012 Total Tax Revenue
Yazoo County	2.0	2.0	67,202	357,003	424,205
Total			\$19,216,939	\$40,371,934	\$59,588,873

NOTE: Tourism Offices include CVBs, Convention and Visitor Councils, Tourism Associations, Tourism Commissions, Tourism Councils, Cities/Counties and Chambers.

A portion of these gross revenues are attributed to locals.

> Washington County's special lodging tax increased to 3.0 % from 1.0 % during FY 2012.

# A 3.0 % city lodging tax plus a flat occupancy tax of \$2 per occupied room, per night.

^ McComb reinstated the special lodging tax in FY 2012.

\* Includes a 75 cents per night charge per occupied room.

! Southaven's special city 1.0 % restaurant tax went into effect December 2011 (FY 2012).

Byhalia's 2.0 % and Fulton's 3.0 % city lodging taxes begin in FY 2013.

SOURCE: Department of Revenue, 2012.

### Tourism Capital Investment (TCI) FY 2012 Surveys

MDA Tourism Division Research Program updated the FY 2012 TCI data, with input from City and County Building/Permit Departments; Tourism Offices; Chambers of Commerce; McGraw-Hill Construction/Dodge; state agencies. Appendices E and F list county level FY 2011 and 2012 TCI expenditures. TCI valuation is based on commercial permits issued and Tourism factors for new construction and expansion and/or renovation of Tourism-related businesses and projects. Dollar amounts don't reflect announcements or dollars spent over a multi-year period. They reflect estimated contract construction costs and permit fees, but not land acquisition costs, site prep, planning, casino or business equipment purchasing costs, condo "flipping," furniture & fixtures, etc. Many entities don't furnish data. TCI is a net Travel and Tourism estimate since it focuses on the Travel and Tourism construction component only.

Total estimated statewide TCI in FY 2011 was \$189.5 million, based on data secured, and \$184.9 million in FY 2012, or \$4.6 million less—a 2.5 % decrease. Some \$93.3 million, or 50.4 % of the FY 2012 TCI, was from public [federal, state, local government] sources. The other \$91.6 million, or 49.6 %, were from private sources.

The Mississippi Gulf Coast accounted for \$51.5 million in FY 2012 TCI, or 27.9 % of the state's total. Museums, retail establishments, infrastructure, casinos, restaurants, marinas and piers, and many others comprised this TCI. Harrison County accounted for about 80.2 % of the Coast TCI; with Hancock County and Jackson County, together, at 19.8 %.

Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) combined FY 2012 TCI was \$33.8 million, or 18.3 % of \$184.9 million. Projects were rest area work in Copiah County; Jackson museum projects—both renovations and new museum activity; hotel construction in Pearl and Ridgeland; Jackson-Medgar Evers International Airport capital investment; restaurants and retail projects throughout cities in Rankin County.

Tunica County's \$2.74 million in FY 2012 TCI focused on casino hotel renovations and some airport construction activity. DeSoto County's TCI comprised I-55 Welcome Center/Rest Area work and other infrastructure. Greenville/Washington County reflected \$2.3 million for FY 2012 projects such as casino-related renovations.

The Hattiesburg area (Forrest/Lamar counties) had \$4.4 million in FY 2012 TCI. This included restaurant and retail projects, infrastructure, state park renovations, Longleaf Trace work. Jones County's \$1.6 million TCI mainly included a museum addition, airport projects and other infrastructure. Pike County's \$1.4 million in FY 2012 TCI was primarily highway (infrastructure) related.

Tupelo's \$15.3 million for FY 2012 TCI covered hotel construction, their regional airport, restaurant projects, infrastructure, among others. Oxford plus Lafayette County non-city TCI was about \$2 million—infrastructure, outdoor recreation.

Meridian/Lauderdale County's \$2.7 million in FY 2012 TCI covered new road construction, pavement rehab, airport improvements, retail, restaurants and other projects. Neshoba County's \$910,000 in FY 2012 TCI was primarily infrastructure work. Scott County had \$3.7 million in TCI, mainly for new highway construction, plus state park renovations.

Natchez had \$13.4 million in FY 2012 TCI—a new hotel, estimated brick and mortar costs associated with a new casino. Vicksburg’s \$2.5 million in FY 2012 TCI featured a new museum, retail, new infrastructure. Pearl River County’s \$3.1 million in FY 2012 TCI included new construction work on a theater and coliseum.

FY 2013 TCI will continue to secure data from building/planning departments. TCI will vary in subsequent years, depending on the nature of TCI projects, the thorough scope of the data provided by the various sources, and the completed surveys returned.

### ***Delimitations***

This study is delimited to Travel and Tourism businesses in Mississippi's 82 counties. Private, public, nonprofit and quasi-public firms directly and indirectly affected by Travel and Tourism are represented in this study: categories, number of employees and other characteristics.

### ***Limitations***

This study should be interpreted only for Mississippi. It may be limited by the challenges of providing a comprehensive and local view of Travel and Tourism expenditures. Travel and Tourism businesses cover a broad range of North American Industry Classification System (NAICS) codes. Thus, assumptions were made for certain employment and revenue categories based on their Travel and Tourism links. These assumptions may be adjusted in light of future research. The study is limited by not having access to automotive gasoline sales for 79 of the state's 82 counties (statewide data are available and estimates are computed for some counties). The Department of Revenue’s Petroleum Tax Division provides disbursements for the Hancock, Harrison and Jackson County Seawall Tax. This facilitates revenue figures for these three counties based on the net taxable gallons sold.

This study uses statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. IMPLAN 2011 Version 3 data intersect, but are not identical with, FY 2012 data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties/cities. Limitations at the county level include the difficulty in assigning percent figures in traveler/visitor sales as a proportion of total sales in a given county.

## Glossary

- Balance of Travel and Tourism Trade:** Travel and Tourism Exports minus Travel and Tourism Imports, taking leakage into account.
- Comped Rooms:** Lodging arrangement where the occupied room is not paid for by the guest.
- Composite Industry:** One such as Travel and Tourism, comprising different sectors of the economy, e.g. Accommodation & Food Services; Retail trade, including gasoline at the pump; Construction.
- Concentration Rank:** Travel and Tourism employment divided by nonfarm establishment-based employment.
- Deplanements:** The number of scheduled airline passengers exiting a plane.
- Enplanements:** The number of scheduled airline passengers boarding a plane.
- Establishment-Based Employment:** Nonfarm employment at the state/county level by the establishment's location, not by the employee's place of residence.
- Fiscal Year (FY) 2012:** July 2011–June 2012.
- Full-Time Equivalent (FTE):** The estimated number of full-time paid employees, plus a ratio of one paid FTE for every 2.0 to 2.5 part-time or seasonal employees.
- General Fund:** Travel and Tourism's contribution to Mississippi's General Fund includes a portion of these revenues related to Travel and Tourism—sales tax, personal income tax, gaming fees and taxes, impact of additional labor income, construction activity tax and other taxes.
- Government Expenditures:** The estimated public expenditures from state agency, city and county budgets allocated for Travel and Tourism-related projects, or projects with some Travel and Tourism impact, excluding Tourism Capital Investment (TCI).
- Gross Gaming Revenues:** Net gains realized by a casino after payment of all cash paid out as losses to patrons and those amounts paid to purchase annuities to fund losses paid to patrons over several years by independent financial institutions.
- IMPLAN:** A nationally recognized economic contribution model to estimate the economic activity associated with a sale of a good or service. It is the basis for estimating indirect & induced contributions. In the IMPLAN model, indirect and induced impacts are filtered through a Social Accounting Matrix (SAM) for total value added, employment and labor income.
- Indirect Contribution:** Secondary contribution of purchase of production by the firm (business level), holding everything else constant. Example: Hotels purchase cleaning supplies.
- Induced Contribution:** Secondary contribution from the purchases made by the workers (consumer level), holding everything else constant. Example: Hotel employee wages contribute to the purchase of goods and services in the local economy.
- In-State Traveler Spending:** Mississippians traveling within the state, at least 50+ miles, one-way.
- Leakage:** Money that leaves an area, e.g., a state, during the various rounds of expenditures.
- Metropolitan Statistical Area (MSA):** Have at least one urbanized area of 50,000 or more population, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties.
- Mississippi Travel and Tourism Economic Contribution Model:** Estimates employment, payroll, expenditures, General Fund revenues, Capital Investment and Total Value Added. In Mississippi, it reflects Travel and Tourism's economic contributions for this rural state with coastal counties.
- Multipliers:** The direct contribution plus the indirect contribution plus the induced contribution divided by the direct contribution. It's an indicator of SAM linkages in the economy.
- Net Traveler/Visitor Sales and Tax Revenues:** Estimated portion of Travel and Tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales and General Fund revenues.
- Nominal Dollars:** Travel and Tourism Payroll and Expenditures by Visitors not adjusted for inflation. Real dollar amounts are adjusted for inflation. This report only presents nominal dollar amounts. Ditto for prior Travel and Tourism Economic Contribution Reports.
- North American Industry Classification System (NAICS) Codes:** Six-digit coding system started in 1997, then updated in 2001, 2007 and 2012. The structure of NAICS is hierarchical. The first two digits of the code designate the sector, the

third digit designates the subsector, the fourth digit designates the industry group, the fifth digit designates the NAICS industry and the sixth digit designates the national industry. NAICS uses a production-oriented approach to categorize economic units and focuses on how products and services are created. NAICS replaced the Standard Industrial Classification (SIC) system for statistical purposes.

**Qualified Households:** Qualified households will have traveled 50+ miles from home, or overnight for business or pleasure, but exclude commuters. All FY 2012 Visitor Profile Study respondents were required to have traveled for leisure in the past 12 months.

**Ridership (Amtrak):** Equal to half of total boardings and alightings (getting on and off the train).

**Sector:** The broad two-digit NAICS category, e.g., sector); 44 - 45 Retail Trade (sector under Trade, Transportation & Utilities); 72 Accommodation and Food Services (sector under Leisure & Hospitality supersector).

**State Gross Domestic Product (State GDP):** A measurement of a state's output—the sum of value added from all industries in the state. State GDP measures the value added to U.S. production by the labor and capital in each state.

**State-Level Travel and Tourism Accounts:** A system that encompasses Travel and Tourism's Broader View. Its focus: circular flow of goods and services in the economy between Travel and Tourism Industry Supply and the impact of Travel and Tourism Commodity Demand within a state.

**Sub-Sectors:** More specific three-digit NAICS categories; e.g., 311 Food Manufacturing in 31 Manufacturing; 447 Gasoline Service Stations under 44 Retail Trade.

**Total Value Added:** Payments to labor and capital by industry, or gross output less intermediate inputs. The total contribution (direct, indirect, induced) of an industry or sector to GDP.

**Tourism Capital Investment (TCI):** New construction and expansion/renovation of Tourism-related businesses/projects with public/private funding sources during a fiscal year. Estimated TCI valuation is based on commercial permits issued and the Tourism factor.

**Travel and Tourism:** The science, art, and business of attracting and transporting travelers/visitors, accommodating them and graciously catering to their needs and wants. Travel and Tourism is a "Composite Industry" comprising different sectors of the economy.

**Travel and Tourism Economy:** Grouping, matching and use of NAICS and IMPLAN codes to estimate Travel and Tourism's state/county contribution of value added, total employment and labor income associated with Travel and Tourism, TCI, Travel and Tourism's contribution to the General Fund, travel expenditures, government spending, Travel and Tourism Exports and Imports. Overlapping elements exist between Travel and Tourism Economy and Industry.

**Travel and Tourism Exports:** Travel expenditures by out-of-state travelers/visitors in Mississippi.

**Travel and Tourism GDP (Value Added):** Value Added of Travel and Tourism's composite nature expressed as its overall contribution to State GDP, or Value Added divided by GDP. Travel and Tourism GDP measures: direct contribution of the Travel and Tourism Industry. Current-dollar GDP is used for FY 2012 Travel and Tourism activity in Mississippi, as opposed to inflation-adjusted real GDP.

**Travel and Tourism Imports:** Travel expenditures by Mississippi residents outside the state.

**Travel and Tourism Industry:** Assembling and use of NAICS codes to estimate Travel and Tourism's statewide contribution for direct employment, annual payroll for direct jobs, travel expenditures, value added, state and city/county tax revenues, General Fund revenues, etc.

**Travel and Tourism Supply and Demand:** Traveler direct spending in Mississippi is the Travel and Tourism Demand or direct Travel and Tourism Output (supply side). Direct Output includes goods and services sold directly to travelers that equal value added and intermediate inputs (including energy, raw materials, semi-finished goods and services).

**Traveler/Visitor:** A 100-mile or more round trip (less for overnight stays) from in-state or out-of-state households, to enjoy the history, scenery and attractions of another community. Includes in-state and out-of-state overnight leisure, day leisure, day or overnight business, group travelers, International visitors, and combined business/leisure travel segments.

**Value Added:** Economic measure of production which includes only goods and services produced in Mississippi. It estimates the state's direct Travel and Tourism contribution to GDP. Total Value Added is the total contribution (direct, indirect, and induced) of an industry sector to GDP.

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Hancock County. Reba McCaleb, Accounts Receivable Clerk.  
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    Golden Triangle Regional Airport. Mike Hainsey, Assistant Director.  
    Greenville Mid-Delta Airport. Draylan Gant, Director.  
    Gulfport-Biloxi International Airport. Stephen Oberlies, Director of Finance.  
    Hattiesburg-Laurel Regional Airport. Thomas Heanue, Executive Director; Nancy Gibson, Assistant.  
    Jackson-Medgar Wiley Evers International Airport. Jack Weldy, Properties and Leases Manager.  
    Meridian Airport Authority. Debbie Moulds, Executive Assistant.  
    Tunica County Airport. Cliff Nash, Executive Director; Tracy Webb, Finance Director.  
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Attala County. Kempe Hodges, Tax Assessor and Collector.  
Bolivar County. Amber Sykes and Pam Kovac, Tax Assessor/Collector's Office.  
Claiborne County. Diane Davaul, Tax Assessor and Collector.  
Coahoma County. Hattie Shivers, Tax Assessor.  
DeSoto County Chancery Courthouse and designated web site.  
Forrest County. Delbert Dearman, Tax Collector.  
Grenada County. David Melton, Tax Assessor and Collector.  
Hinds County. Stephen Lasseigne, IT Department.  
Inverness, City of. Patricia Lockett, City Clerk.  
Itawamba County. Aaron Loden, Tax Collector.  
Jackson County. Nick Elmore, Tax Collector's Office.  
Jones County. Lucky Holifield, Appraisal Office.  
Lafayette County. Sylvia Baker, Tax Assessor and Collector.  
Lamar County. Jack Smith, Tax Collector.  
Lauderdale County. Brandi Coghlan, Deputy Tax Collector.  
Leake County. Kim Withers, Tax Assessor and Collector.  
Lee County. Ja-Tara Wofford, Deputy Clerk, Tax Collector's Office.  
Leflore County. Sara Kenright, Tax Collector.  
Lowndes County. Greg D. Andrews, Tax Assessor and Collector.  
Madison County. Debra Johnson, Tax Assessor's Office; Kent Hawkins, Chief Deputy Assessor.  
Monroe County. Pat Birkholz, Tax Collector.  
Montgomery County, Velma Young, Tax Assessor and Collector, Monica Turner, Deputy Clerk.  
Neshoba County. Mike Lewis, Tax Collector.  
Newton County. Geraldine Seal, Tax Assessor and Collector.  
Oktibbeha County. Barbara Cubon, Oktibbeha Tax Office.  
Oxford, City of. Ashley Atkinson, Accountant/Auditor.  
Panola County. Rhonda Fox, Tax Collector's Office.  
Pearl River County. Darlene Hyatt, Tax Assessor/Collector's Office.  
Rankin County. Judy Fortenberry, Tax Collector.  
Scott County. Beth Watson, Tax Collector's Office.  
Simpson County. Dawn Bradshaw; Charles Baldwin, Tax Assessor and Collector.  
Sunflower County. Renee Upton, Accountant, Tax Collector's Office.  
Tunica County. Norma Anderson, Tax Assessor and Collector.  
Union County. Dennis Rakestraw, Tax Assessor and Collector.  
Warren County. Angela Brown, Tax Assessor; Renee Davis, Tax Assessor Office.  
Washington County. Mark Seard, Tax Assessor.  
Yazoo County. Travis Crimm, Jr., Tax Collector.

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Hattiesburg CVB/Visitors Center. Nicole R. Ruhnke, Visitor Services.  
Hinds County Economic Development District, Pat Browning.

Jackson County Chamber of Commerce. Linda Johnson, Vice-President, Operations.  
McGraw-Hill Construction/Dodge. Shawn LaRoche, Economic Analyst.  
Meridian, City of. Don Jemison, Planning Manager; and Kathy Coker.  
Mississippi Department of Finance and Administration (DFA). Debra Jean Hodge, Systems Analyst.  
Ocean Springs, City of. Theresa Dobbs, CFM, Building Department.  
Oxford CVB. Mary Allyn Hedges, Tourism Coordinator.  
Pearl, City of. Lorraine Knight, Building Permit Specialist.  
Pike County Chamber of Commerce. Tammy Menard, Executive Director.  
Richland, City of. Ann Grantham, Public Works/Community Development.  
Ridgeland, City of. Karen Knight, Zoning Administrator, Community Development.  
Tupelo, City of. Marilyn Vail, Zoning Administrator.  
Vicksburg, City of. Victor Grey-Lewis, Director of Building Inspections.  
Woodville/Wilkinson County Main Street Association. Polly Rosenblatt, Manager.  
U.S. Army Corps of Engineers:  
    Bay Springs Site Office. Justin V. Murphree, Site Manager.  
    Columbus Office. Ralph Antonelli, Park Manager, Columbus Office.  
    Vicksburg Headquarters. Lawran Richter, Outdoor Recreation Planner.  
U.S. Department of the Interior, National Park Service:  
    Brice's Crossroads National Battlefield Site. Edwina Carpenter, Curator.  
    Natchez National Historical Park. Melissa Tynes, Division Chief.  
    Natchez Trace Parkway. Janet Battle, Debbie Diaz, Human Resources Office.  
    Shiloh National Military Park/Corinth site. Stacy D. Allen, Chief Ranger.  
    Vicksburg National Military Park. Shirley Smith, Human Resources Assistant.  
  
Mississippi Development Authority Tourism Division, Leigh Portwood, Associate Manager, Tourism Services.

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## **APPENDICES**

**Appendix A**

**ESTIMATED TRAVEL AND TOURISM DIRECT EMPLOYMENT,  
FY 2011 AND FY 2012**

Category	FY 2011	FY 2012	Change
Food Services & Drinking Places (1)	26,000	27,080	4.2%
Lodging, excluding all casino hotels (2)	11,975	12,465	4.1%
Gaming, state-licensed casinos and hotels (3)	24,355	23,415	-3.9%
Retail Trade (4)	8,840	9,620	8.8%
Support Activities, Air Transportation (5)	1,950	1,965	0.8%
Air Passenger, Scheduled & Chartered (5)	302	293	-3.0%
Scenic & Sightseeing Transportation	33	33	None
Charter Bus Industry	106	107	0.9%
Taxi and Limo Service	70	67	-4.3%
Amtrak, Other Bus Transportation	75	75	None
Sub-Total, Transportation	2,536	2,540	0.2%
Travel Arrangement/Reservations	352	364	3.4%
Passenger Car Rental	326	345	5.8%
Parking Lots & Garages	13	13	None
Advertising & Related Services	205	211	2.9%
Laundry Services	140	150	7.1%
Sub-Total, Other Services	1,036	1,083	4.5%
Motion Picture Theaters	148	145	-2.0%
Motion Picture & Video Production	174	43	-75.3%
Museums, Historical Sights & Similar (6)	385	400	3.9%
Performing Arts, Spectator Sports & Related	446	454	1.8%
Amusement Parks, Bowling, Golf Courses, Marinas	1,152	1,139	-1.1%
Federal, State, Local Tourism Agencies/Offices (7)	867	900	3.8%
Gaming, Lodging, Other at tribal resorts (8)	1,775	1,800	1.4%
Selected Outdoor Recreation (9)	487	511	4.9%
Construction (10)	1,824	1,750	-4.1%
<b>Total</b>	<b>82,000</b>	<b>83,345</b>	<b>1.6%</b>

*Appendix A (continued)*

1. *Alcohol/nonalcohol Restaurants, Drinking Places, among other establishments.*
2. *Estimates based on Mississippi Department of Employment Security data for Hotels & Motels (NAICS 72111), Other Traveler Accommodations (NAICS 72119) and RV Parks & Recreational Camps (NAICS 7212), some Residential Property Managers (NAICS 531311). Excludes state-licensed casino and tribal casino/resort hotels.*
3. *Based on LMI and MGC quarterly surveys; the data include state-licensed casino hotel employees.*
4. *Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops, Antiques & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; RV Dealers; Motorcycle, Boat & other Motor Vehicle Dealers; Automotive Parts & Accessory Stores; Tire Dealers; Jewelry, Luggage & Leather Goods Stores.*
5. *Reflects non-cargo jobs only. Includes some federal and local government support jobs.*
6. *FY 2011 data includes results from an in-depth Mississippi Museum data gathering initiative.*
7. *U.S. Army Corps of Engineers, Columbus and Vicksburg Districts; the Natchez Trace Parkway; Vicksburg Military Park; Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site. Includes the staff at Mississippi's 13 Welcome Centers, MDA Tourism Division, local Tourism Offices/Bureaus, plus other State Agencies--the Mississippi Department of Archives and History; Arts Commission; Mississippi Gaming Commission; Pearl River Basin Development District; Pearl River Water Supply District; Mississippi Department of Marine Resources.*
8. *The FY 2012 estimate reflects estimated gaming and non-gaming employment at the Tribal Resort.*
9. *Includes some reported Agricultural Tourism employment; campgrounds; hunting & fishing; the Mississippi Department of Wildlife, Fisheries & Parks--Parks Unit--are included. The Pat Harrison Waterway District furnished calendar year 2010 + 2011 data, included in FY 2011 and FY 2012. There were Outdoor Recreation surveys capturing some FY 2011 data.*
10. *Only reflects estimated Travel and Tourism-related construction activity.*

*SOURCES: Convention & Visitor Bureaus (CVB's) and other Tourism Offices, 2012.*

*Department of Revenue, 2012.*

*Mississippi Arts Commission, 2012.*

*Mississippi Department of Archives and History, 2012.*

*Mississippi Department of Employment Security, LMI Department, 2012.*

*Mississippi Department of Marine Resources, 2012.*

*Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2012.*

*Mississippi Development Authority Tourism Division, 2012.*

*Mississippi Gaming Commission, 2012.*

*Mississippi Museum of Natural Science, 2012 (under DWF&P).*

*Outdoor Recreation Surveys, 2011.*

*Pat Harrison Waterway District, Hattiesburg, 2012.*

*Pearl River Basin Development District, 2012.*

*Pearl River Water Supply District, 2012.*

*U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg headquarters, 2012.*

*U.S. Department of the Interior, National Park Service:*

*Brice's Crossroads National Battlefield Site.*

*Natchez National Historical Park.*

*Natchez Trace Parkway.*

*Shiloh National Military Park/Corinth.*

*Vicksburg National Military Park, 2012.*

**Appendix B**

**ESTIMATED TRAVEL AND TOURISM DIRECT PAYROLL,  
FY 2011 AND FY 2012**

Category	FY 2011 Payroll	FY 2012 Payroll	Change
Food Services & Drinking Places	\$328,692,453	\$350,648,711	6.7%
Lodging (1)	\$174,285,597	\$183,127,085	5.1%
Gaming (2)	\$745,865,145	\$741,137,168	-0.6%
Retail Trade (3)	\$167,500,775	\$182,694,109	9.1%
Support Activities, Air Transportation	92,235,716	106,653,124	15.6%
Air Passenger, Scheduled & Chartered	11,321,600	10,349,665	-8.6%
Scenic & Sightseeing Transportation	1,072,398	869,951	-18.9%
Charter Bus Industry	2,304,608	2,489,122	8.0%
Taxi and Limo Service	1,160,074	1,201,186	3.5%
Amtrak, Other Bus Transportation	5,108,963	5,085,925	-0.5%
Sub-Total, Transportation	\$113,203,359	\$126,648,973	11.9%
Travel Arrangement/Reservations	9,370,293	9,718,701	3.7%
Passenger Car Rental	7,955,032	8,424,592	5.9%
Parking Lots & Garages	199,259	194,758	-2.3%
Advertising & Related Services	7,960,465	8,033,185	0.9%
Laundry Services	2,765,383	2,963,348	7.2%
Sub-Total, Other Services	\$28,250,432	\$29,334,584	3.8%
Motion Picture Theaters	1,512,569	1,543,073	2.0%
Motion Picture & Video Production	2,154,378	1,210,503	-43.8%
Museums, Historical Sights & Similar	12,153,122	12,815,257	5.4%
Performing Arts, Spectator Sports, Related	11,891,204	11,907,154	0.1%
Amusement Parks, Bowling, Golf Courses, Marinas	19,814,937	19,870,202	0.3%
Federal, State, Local Tourism Agencies (4)	45,164,362	47,396,653	4.9%
Gaming, Lodging, Other at tribal resorts (5)	50,000,000	51,250,000	2.5%
Selected Outdoor Recreation (6)	7,986,900	8,555,074	7.1%
Construction (7)	\$63,553,904	\$62,109,033	-2.3%
Total	\$1,772,029,137	\$1,830,247,579	3.3%

*Appendix B (continued)*

1. Does not include the payroll of state-licensed casino hotels, nor Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos, plus casino hotels, but not the estimated payroll of Pearl River Resort casino employees.
3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops, Antiques & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; RV Dealers; Motorcycle, Boat & other Motor Vehicle Dealers; Automotive Parts & Accessory Stores; Tire Dealers; Jewelry, Luggage & Leather Goods Stores.
4. U.S. Army Corps of Engineers, Columbus and Vicksburg Districts; the Natchez Trace Parkway; Vicksburg Military Park; Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site. Includes the staff at Mississippi's 12 Welcome Centers, MDA Tourism Division, local Tourism Offices/Bureaus, plus other State Agencies--the Mississippi Department of Archives and History; Arts Commission; Mississippi Gaming Commission; Pearl River Basin Development District; Pearl River Water Supply District; Mississippi Department of Marine Resources.
5. Only reflects estimated payroll at Tribal Resort Gaming and Tribal Non-Gaming Venues.
6. Includes some Agricultural Tourism employment; campgrounds; hunting & fishing; the Mississippi Department of Wildlife, Fisheries & Parks--Parks Unit--are included. There was an Outdoor Recreation survey capturing some FY 2011 data. The Pat Harrison Waterway District furnished calendar year 2010 and 2011 data.
7. Only reflects estimated Travel and Tourism-related construction activity.

*NOTE: These are nominal dollar amounts NOT adjusted for inflation.*

*SOURCES: Convention & Visitor Bureaus (CVB's) and other Tourism Offices, 2012.*

*Department of Revenue, 2012.*

*Mississippi Arts Commission, 2012.*

*Mississippi Department of Archives and History, 2012.*

*Mississippi Department of Employment Security, LMI Department, 2012.*

*Mississippi Department of Marine Resources, 2012.*

*Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2012.*

*Mississippi Development Authority Tourism Division, 2012.*

*Mississippi Gaming Commission, 2012.*

*Mississippi Museum of Natural Science, 2012 (under DWF&P).*

*Outdoor Recreation Surveys, 2011.*

*Pat Harrison Waterway District, Hattiesburg, 2012.*

*Pearl River Basin Development District, 2012.*

*Pearl River Water Supply District, 2012.*

*U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg Headquarters, 2012.*

*U.S. Department of the Interior, National Park Service:*

*Brice's Crossroads National Battlefield Site.*

*Natchez National Historical Park.*

*Natchez Trace Parkway.*

*Shiloh National Military Park/Corinth.*

*Vicksburg National Military Park, 2012.*

## Appendix C

### ESTIMATED TRAVEL AND TOURISM EXPENDITURES BY VISITORS FY 2011 AND FY 2012

Category	FY2011	FY2012	Change
Restaurants	\$941,968,419	\$996,109,550	5.7%
Quick-Stop, Specialty Food & Grocery Stores	562,002,848	578,287,934	2.9%
Concessions Quick Food	75,408,731	84,615,195	12.2%
Bar & Beer Parlors	62,998,872	75,496,730	19.8%
Lodging (1)	766,000,000	775,067,471	1.2%
Gaming (2)	1,637,239,801	1,624,409,738	-0.8%
Department & General Merchandise (NEC)	630,037,113	663,973,750	5.4%
Other Retail, including Gasoline/Service Stations (3)	1,033,950,030	1,159,530,736	12.1%
Fixed Facilities, Air Transportation (4)	22,323,001	11,128,807	-50.1%
Rental & Leasing, Transportation	20,962,031	13,821,273	-34.1%
Auto Repair Shops & Accessories	77,654,968	81,457,132	4.9%
Rail and Water Passenger Transportation (5)	8,114,463	8,376,926	3.2%
Entertainment/Outdoor Recreation (6)	75,511,074	76,621,910	1.5%
Gaming @ Tribal Resorts (7)	45,176,763	NA	NA
Advertising Specialties	1,488,233	1,778,249	19.5%
Printing & Publishing	4,544,558	2,357,309	-48.1%
Laundries, Dry Cleaning	6,668,183	6,225,718	-6.6%
<b>Total</b>	<b>\$5,972,049,088</b>	<b>\$6,159,258,428</b>	<b>3.1%</b>

NOTE: These are nominal dollar amounts NOT adjusted for inflation.

This Appendix Includes:

1. The FY 2011 and FY 2012 Lodging figures reflected some adjustments, based on Smith Travel Research (STR) monthly survey data for Mississippi cities/regions.
2. Net Travel/Visitor Gross Gaming Revenues for 30 state-licensed casinos in FY 2011; and 29 in FY 2012.
3. Includes Apparel & Accessories; Miscellaneous Retail; Gift, Novelty & Souvenir; Sporting Goods, Bicycle & Music/Book Stores; Camera & Photographic Stores; Antique & Secondhand Stores; Cigar Stores & Stands; Drug Stores; Gaming Retail; Gasoline and Diesel Fuel at 18 cents; Gasoline Service Stations/Convenience Stores; RV Dealers; Motorcycle, Boat & Other Motor Vehicle Dealers; Automotive Parts & Accessory Stores; Tire Dealers; Jewelry, Luggage & Leather Goods Stores. First Sales of Petroleum Products into Mississippi for Consumption and AAA self Service Unleaded Gas Price Averages.
4. Air Transportation, Air Terminal, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY 2011 and FY 2012, based on scheduled/charter passenger service and Passenger Facility Charges.
5. Amtrak ticket sales included for both FY 2011 and FY 2012.
6. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Public Tennis Courts; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Motion Picture Shows; Museums; State Parks, Federal & Private Outdoor Recreation.
7. This is a very rough conservative estimate for travelers based on articles and blogs. The FY 2011 figure was adjusted downward. Data were not available for FY 2012.

SOURCES: American Automobile Association Web Site, 2012.

Amtrak Station Revenue e-searches, 2012.

Department of Revenue, 2012.

Mississippi Department of Marine Resources, 2012.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2012.

Mississippi Development Authority Energy Division, 2012.

Mississippi Development Authority Tourism Division, 2012.

Mississippi Gaming Commission, 2012.

U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg Headquarters, 2012.

U.S. Department of the Interior, National Park Service:

Brice's Crossroads National Battlefield Site, Natchez National Historical Park,

Shiloh National Military Park/Corinth, Vicksburg National Military Park, 2012.

Smith Travel Research (STR) monthly survey data for Mississippi cities/regions, 2012.

## Appendix D

### ESTIMATED TRAVEL AND TOURISM GENERAL FUND REVENUES, FY 2011 AND FY 2012

Category	FY2011	FY2012	Change
Restaurants	\$39,562,673	\$41,837,072	5.7%
Quick-Stop, Specialty Food & Grocery Stores	23,604,118	24,127,066	2.2%
Concessions Quick Food	3,167,167	3,553,778	12.2%
Bar & Beer Parlors	2,645,953	3,173,861	20.0%
Lodging (1)	31,875,000	32,208,212	1.0%
State-Licensed Casino Gaming (2)	104,940,729	107,920,000	2.8%
Department & General Merchandise	26,461,558	27,885,166	5.4%
Other Retail (3)	22,715,452	24,415,616	7.5%
Rental & Leasing, Other Transportation (4)	677,160	642,790	-5.1%
Auto Repair Shops & Accessories	3,261,509	3,426,531	5.1%
Entertainment/Outdoor Recreation (5)	2,968,915	3,170,063	6.8%
Advertising Specialties	62,505	74,672	19.5%
Printing & Publishing	191,291	98,970	-48.3%
Laundries, Dry Cleaning	280,064	261,464	-6.6%
Construction Activity Tax (6)	4,542,587	4,436,663	-2.3%
Personal Income/Sales Tax (7)	98,828,857	102,025,080	3.2%
Use Tax (8)	7,750,443	11,565,855	49.2%
Beer and Wine Tax (9)	11,000,000	11,177,326	1.6%
<b>Total</b>	<b>\$384,535,981</b>	<b>\$402,000,185</b>	<b>4.5%</b>

*This Appendix Includes:*

1. Statewide and city data from Smith Travel Research were used for this estimate.
2. Approximately \$107.9 million, or 71.0% of the \$152 million in General Fund Gaming Fees and Tax Transfers, were the "Net" Travel and Tourism Portion. The other \$44.1 million, or 29.0%, were not attributed to Travel & Tourism. This does not include \$36 million diverted to MDOT's Bond Sinking Fund, \$3 million per month.
3. Includes Apparel & Accessories; Miscellaneous Retail; Gift, Novelty & Souvenir; Sporting Goods, Bicycle & Music/Book Stores; Camera & Photographic Stores; Antique & Secondhand Stores; Cigar Stores & Stands; Drug Stores; Gaming Retail; Gasoline Service Stations/Convenience Stores; RV Dealers; Motorcycle, Boat & other Motor Vehicle Dealers; Automotive Parts & Accessory Stores; Tire Dealers. This Appendix does not include Gasoline/diesel sales @ the pump, since those monies are diverted.
4. Also includes: Transportation Services, Fixed Facilities-Air Transportation, Water Passenger Transportation.
5. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Public Tennis Courts; Motion Picture Shows; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Museums; State Parks, Federal & Private Outdoor Recreation; National Historical Areas.
6. The estimated Travel and Tourism-related portion of the General Fund based on TCI.
7. The estimated Travel and Tourism-related portion of the General Fund amount, based on estimated effective tax rates for Personal Income, Sales Tax and all other Taxes.
8. The FY 2012 estimate comprised 78.3 % of the Travel and Tourism-related equipment purchases for Mississippi's counties/cities within these counties.
9. None of the Beer and Wine Tax General Fund receipts are diverted to cities/counties.

NOTE: All dollar amounts are the estimated "net" Travel and Tourism portion.

SOURCES: Center for Policy Research and Planning, Mississippi IHL, 2012.  
 Department of Revenue, 2012.  
 Mississippi Department of Employment Security, LMI Department, 2012.  
 Mississippi Development Authority Energy Division, 2012.  
 Mississippi Development Authority Tourism Division, 2012.  
 Smith Travel Research monthly survey data for Mississippi cities/regions, 2012.

**Appendix E**

**ESTIMATED TRAVEL AND TOURISM EXPENDITURES,  
EMPLOYMENT, TAXES, TCI, FY 2011**

County	Travel and Tourism Expenditures by Visitors *	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/ Fees Attributed to Tourism***	Tourism Capital Investment
Adams	\$90,080,196	2,040	18.3	\$8,129,524	\$6,222,829
Alcorn	47,262,467	735	6.0	3,943,022	876,930
Amite	1,814,300	25	1.7	151,366	183,842
Attala	16,908,543	275	6.0	1,359,843	502,058
Benton	803,812	12	0.9	76,619	0
Bolivar	34,765,159	550	4.7	2,984,458	140,123
Calhoun	3,061,985	40	1.3	235,875	265,287
Carroll	1,117,642	16	1.6	102,193	78,104
Chickasaw	5,096,171	72	1.3	382,810	299,856
Choctaw	1,089,890	14	0.7	117,982	0
Claiborne	2,377,104	42	1.3	244,058	0
Clarke	3,827,450	55	1.8	323,331	136,633
Clay	15,311,757	225	4.4	1,222,157	253,808
Coahoma	61,416,014	920	11.0	6,583,132	414,292
Copiah	8,007,079	110	1.5	582,427	1,808,446
Covington	6,553,021	95	2.0	489,704	289,410
DeSoto	238,326,617	3,200	7.1	19,632,326	1,987,213
Forrest ^	233,387,020	3,900	6.8	20,635,754	5,385,436
Franklin	948,393	16	1.0	87,934	0
George	8,151,417	115	2.5	591,865	166,708
Greene	1,309,297	17	1.0	115,458	327,085
Grenada	40,020,044	705	8.0	3,504,368	574,545
Hancock	155,162,576	1,830	12.8	16,969,331	7,067,303
Harrison	1,448,374,190	20,340	23.2	152,044,435	35,058,890
Hinds	368,184,951	6,800	5.1	33,010,374	20,114,615
Holmes	3,908,771	52	1.4	307,987	2,779,769
Humphreys	2,350,699	30	1.0	187,002	75,992
Issaquena	191,999	3	0.8	12,208	0
Itawamba	10,313,733	150	3.1	886,640	1,015,537
Jackson	155,639,702	1,830	3.5	15,168,187	6,104,093
Jasper	3,064,774	44	1.0	258,280	29,753
Jefferson	979,069	13	1.1	90,932	218,162
Jefferson Davis	2,491,909	30	1.7	199,368	564,497
Jones	59,094,205	850	3.1	5,009,738	7,198,024
Kemper	1,581,299	22	1.2	137,285	20,911
Lafayette	92,174,391	1,450	8.0	7,511,860	5,966,658

County	Travel and Tourism Expenditures by Visitors *	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/ Fees Attributed to Tourism***	Tourism Capital Investment
Lamar ^					^
Lauderdale	148,643,600	1,925	5.7	13,084,618	7,616,032
Lawrence	2,676,004	35	1.3	265,043	47,261
Leake	9,043,141	125	2.2	705,637	93,500
Lee	232,124,655	3,670	7.5	19,048,286	15,894,956
Leflore	52,708,099	750	5.3	4,545,385	317,668
Lincoln	20,911,934	270	2.5	1,557,536	520,499
Lowndes	98,738,459	1,400	5.8	8,670,464	8,527,336
Madison	183,176,660	2,380	5.4	15,477,231	12,138,333
Marion	10,956,120	145	1.9	796,978	246,512
Marshall	12,092,686	185	3.0	988,998	131,941
Monroe	16,367,355	230	2.4	1,386,815	150,516
Montgomery	8,590,611	120	3.6	657,743	91,256
Neshoba #	146,562,708	1,925	16.7	2,520,463	1,302,615
Newton	7,196,888	90	1.7	568,317	5,096,256
Noxubee	4,606,539	65	2.8	391,765	139,185
Oktibbeha	74,911,249	1,040	5.2	6,697,204	622,799
Panola	34,341,965	465	4.2	3,261,882	922,428
Pearl River	21,800,216	275	2.7	1,708,263	1,682,493
Perry	2,215,750	30	1.4	217,796	48,955
Pike	32,542,874	460	3.1	2,334,111	2,481,151
Pontotoc	8,190,247	110	1.1	617,087	384,240
Prentiss	7,907,909	105	1.5	583,134	781,010
Quitman	1,158,591	16	1.3	102,473	0
Rankin	182,517,401	2,375	4.0	17,172,439	8,204,391
Scott	17,637,454	240	1.9	1,533,870	2,754,869
Sharkey	1,251,546	16	1.4	109,241	27,192
Simpson	16,734,791	200	2.6	1,376,870	3,587
Smith	2,125,288	25	0.9	197,931	11,348
Stone	8,257,631	110	2.7	677,155	110,181
Sunflower	13,589,913	185	2.1	1,114,754	609,376
Tallahatchie	3,426,136	47	1.7	249,704	19,333
Tate	10,104,699	135	2.5	795,756	722,279
Tippah	6,644,086	85	1.6	559,776	1,097
Tishomingo	12,352,248	180	3.6	990,298	39,218
Tunica	750,192,674	9,600	86.1	96,390,505	1,740,127
Union	15,820,302	225	2.9	1,367,975	1,546,806
Walthall	2,323,203	33	1.2	183,747	236,653
Warren	200,123,977	4,000	18.3	23,359,259	2,235,769

County	Travel and Tourism Expenditures by Visitors *	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/ Fees Attributed to Tourism***	Tourism Capital Investment
Washington	87,265,021	1,475	8.1	9,045,800	2,545,723
Wayne	8,124,847	100	2.0	597,724	520,191
Webster	2,448,705	35	1.7	194,181	0
Wilkinson	2,924,700	40	1.7	257,716	1,952,035
Winston	14,993,971	225	5.4	1,138,743	1,098
Yalobusha	3,693,162	50	1.7	307,544	317,327
Yazoo	12,843,479	180	3.0	1,150,331	284,775
Other!	333,926,160			39,317,167	290,182
Total	\$5,971,933,300	82,000	7.5	\$587,565,648	\$189,537,308

! Other includes estimated Gasoline Sales and Taxes for some Mississippi Counties, Diesel Fuel Sales, the Non-Resident License Sales reported by the Departments of Wildlife, Fisheries & Parks and Marine Resources (under Fees). Sales and Tax Collections for the 83rd Division, not traced to specific counties, are included. So is the state Beer and Wine Tax (Travel & Tourism portion). Appendix E includes estimated Travel and Tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

# Neshoba County employment figures do reflect estimated Pearl River Resort employment—rough estimate. Estimated Neshoba County expenditures by visitors include a lot of Pearl River Resort activity. This is a significant dollar amount. Figures are rough estimates based on published articles.

Estimated Tourism Capital Investment (TCI) is based on data from sources responding to the survey. NA indicates not available or none.

^ Lamar County data are included with Forrest County as Hattiesburg area.

\* These are nominal dollar amounts NOT adjusted for inflation.

\*\* The Travel and Tourism Employment Percentage equals the estimated direct Tourism jobs divided by the county level Establishment Based nonfarm employment. Data are based on where the employees work, not where they reside.

\*\*\*Estimated State and Local Travel and Tourism Taxes from Travel/Visitor Expenditures and some other activity. Includes the 7.0 % sales tax and the 18.5 % portion diverted to cities; state-licensed casinos; seawall and city-county taxes; state-licensed casino gaming tax revenues; Room/Restaurant special Taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control (ABC) county level share of permit license fees and excise taxes; beer/wine taxes; use taxes; available TCI local permit fees; real & personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to Travel and Tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices.  
 County Tax Assessors and Collectors.  
 McGraw-Hill Construction Dodge.  
 Mississippi Department of Employment Security, LMI Department.  
 Mississippi Department of Finance and Administration, Bureau of Buildings & Real Property Management.  
 Mississippi Department of Transportation.  
 Mississippi Department of Wildlife, Fisheries & Parks.  
 Mississippi Gaming Commission, 2011.

**Appendix F**

**ESTIMATED COUNTY TRAVEL AND TOURISM EXPENDITURES,  
EMPLOYMENT, TAXES, TCI, FY 2012**

County	Travel and Tourism Expenditures by Visitors*	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/ Fees Attributed to Tourism***	Tourism Capital Investment
Adams	\$94,227,218	2,100	18.1	\$8,429,752	\$13,391,027
Alcorn	49,625,623	745	5.7	4,091,448	349,994
Amite	1,697,780	25	1.5	156,220	24,950
Attala	17,180,905	280	5.8	1,358,906	673,615
Benton	886,902	12	0.9	82,361	0
Bolivar	37,423,239	570	4.8	3,197,581	1,099,448
Calhoun	3,079,380	40	1.3	239,907	253,069
Carroll	990,425	14	1.2	96,890	111,038
Chickasaw	5,190,679	73	1.2	397,517	305,552
Choctaw	1,182,069	15	0.8	123,926	0
Claiborne	2,706,243	45	1.2	276,542	14,924
Clarke	3,893,605	55	1.8	330,958	229,308
Clay	16,806,470	230	4.6	1,338,332	381,579
Coahoma	68,986,156	945	11.6	7,188,865	1,423,041
Copiah	7,836,926	110	1.4	589,658	399,264
Covington	7,282,134	100	2.0	556,097	224,541
DeSoto	268,121,114	3,300	7.0	24,654,126	856,590
Forrest ^	247,313,261	3,980	7.2	21,648,026	4,398,589
Franklin	1,013,192	16	1.0	107,251	0
George	7,883,055	110	2.5	564,608	290,462
Greene	1,300,012	17	0.9	127,959	141,581
Grenada	43,828,342	720	7.3	3,787,790	823,972
Hancock	157,555,085	1,845	12.8	17,019,625	2,630,306
Harrison	1,467,342,494	20,525	23.4	157,069,605	41,312,519
Hinds	387,191,422	7,000	5.2	38,551,831	11,656,737
Holmes	3,881,148	52	1.4	307,825	1,552,424
Humphreys	2,439,678	30	1.1	190,972	232,859
Issaquena	193,551	3	0.8	15,015	0
Itawamba	10,823,739	152	3.1	927,048	528,665
Jackson	159,411,065	1,860	3.6	15,952,741	7,564,239
Jasper	3,092,821	44	1.0	265,928	46,591
Jefferson	966,823	13	1.0	98,240	175,657
Jefferson Davis	2,309,171	29	1.8	190,416	529,692
Jones	59,297,463	850	2.9	5,170,892	1,638,786
Kemper	1,670,923	23	1.0	148,875	693,848
Lafayette	105,186,166	1,500	7.8	8,919,491	1,979,394

County	Travel and Tourism Expenditures by Visitors*	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/ Fees Attributed to Tourism***	Tourism Capital Investment
Lamar ^					^
Lauderdale	153,930,491	1,950	5.7	14,781,482	2,691,516
Lawrence	2,792,832	35	1.5	284,807	193,729
Leake	9,030,679	125	2.4	732,718	882,712
Lee	245,030,339	3,750	7.3	22,722,157	15,349,478
Leflore	53,824,290	755	5.5	4,610,092	2,104,870
Lincoln	24,808,538	290	2.6	1,824,223	3,442,371
Lowndes	104,060,493	1,420	5.6	9,227,230	5,165,633
Madison	198,808,960	2,480	5.1	16,495,201	11,732,656
Marion	11,340,645	150	1.8	831,043	76,880
Marshall	12,556,023	185	3.0	1,037,254	3,140,998
Monroe	17,158,414	233	2.4	1,447,867	129,113
Montgomery	9,445,604	125	4.8	738,342	377,497
Neshoba #	32,163,470	1,950	15.3	2,436,404	909,775
Newton	7,373,068	90	1.7	557,926	621,389
Noxubee	4,994,254	66	2.8	410,473	3,267
Oktibbeha	80,856,044	1,060	5.2	7,155,630	5,029,030
Panola	37,054,712	475	4.3	3,426,017	5,375,300
Pearl River	27,105,903	333	3.3	2,361,255	3,139,617
Perry	2,294,542	30	1.4	231,172	122,027
Pike	35,080,122	470	3.3	2,699,743	1,421,610
Pontotoc	8,744,246	114	1.0	665,627	1,763
Prentiss	8,311,820	108	1.5	605,120	454,656
Quitman	1,191,317	16	1.4	105,987	0
Rankin	197,333,464	2,480	4.2	20,483,724	9,998,882
Scott	18,786,707	245	2.0	1,627,331	3,706,535
Sharkey	1,225,721	16	1.5	108,764	0
Simpson	17,366,089	215	2.7	1,408,567	0
Smith	2,125,687	25	0.9	202,506	0
Stone	9,208,018	120	2.9	755,552	61
Sunflower	14,198,362	188	2.2	1,220,041	370,195
Tallahatchie	2,979,546	42	1.5	230,826	0
Tate	9,639,178	132	2.3	775,310	795,406
Tippah	6,913,485	90	1.6	587,265	799,460
Tishomingo	13,354,060	190	3.6	1,085,440	138,365
Tunica	789,606,465	9,500	81.0	98,086,027	2,743,623
Union	16,664,797	235	2.4	1,368,589	1,576,743
Walthall	2,358,928	33	1.2	194,557	50,108
Warren	212,183,552	4,060	18.7	24,769,930	2,529,683

County	Travel and Tourism Expenditures by Visitors*	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage**	State/Local Taxes/Fees Attributed to Tourism***	Tourism Capital Investment
Washington	90,825,922	1,490	8.2	9,220,735	2,331,813
Wayne	7,926,195	100	1.9	594,667	630,173
Webster	2,650,291	35	1.7	207,381	0
Wilkinson	3,248,655	43	1.9	287,651	656,086
Winston	15,732,935	225	4.9	1,172,849	15,651
Yalobusha	3,782,006	51	1.6	316,123	123
Yazoo	14,151,310	192	3.1	1,383,136	705
Other!	369,223,970			40,191,742	288,307
Total	\$6,159,258,428	83,345	7.7	\$625,839,707	\$184,932,067

! Other includes estimated Gasoline Sales and Taxes for some Mississippi Counties, Diesel Fuel Sales, the Non-Resident License Sales by the Departments of Wildlife, Fisheries & Parks and Marine Resources (under Fees). Sales and Tax Collections for the 83rd Division, not traced to specific counties, are included. So is the state Beer and Wine Tax (Travel & Tourism portion). Appendix F includes estimated Travel and Tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

# Neshoba County employment figures do reflect estimated Pearl River Resort employment—rough estimate—from separate sources. Pearl River Resort Travel and Tourism expenditures by visitors: NOT available. Estimated Tourism Capital Investment (TCI) is based on data from sources responding to the survey. NA indicates not available or none.

^ Lamar County data included with Forrest County as Hattiesburg Area.

\* These are nominal dollar amounts NOT adjusted for inflation.

\*\* The Travel and Tourism Employment Percentage equals the estimated direct Tourism jobs divided by the county level Establishment Based nonfarm employment. Data are based on where the employees work, not where they reside.

\*\*\*Estimated State and Local Travel and Tourism Taxes from Travel/Visitor Expenditures and other activity. Includes 7.0 % sales tax and 18.5 % portion diverted to cities; state-licensed casinos; seawall and city-county taxes; state-licensed casino gaming tax revenues; Room/Restaurant special Taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control (ABC) county share of permit license fees and excise taxes; beer/wine taxes; use taxes; available TCI local permit fees; real & personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to Travel and Tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices.  
 County Tax Assessors and Collectors.  
 McGraw-Hill Construction Dodge.  
 Mississippi Department of Employment Security, LMI Department.  
 Mississippi Department of Finance and Administration, Bureau of Buildings & Real Property Management.  
 Mississippi Department of Transportation.  
 Mississippi Department of Wildlife, Fisheries & Parks.  
 Mississippi Gaming Commission, 2012.

**Appendix G**

**ESTIMATED HOTEL/MOTEL ROOM COUNT, FY 2011/FY2012**

County	Hotel/Motel Rooms (6-30-11)	Hotel/Motel Rooms (6-30-12)	Percentage Change
Adams	1,093	1,035	-5.3%
Alcorn	341	364	6.7%
Amite	0	0	NA
Attala	130	130	none
Benton	0	0	NA
Bolivar	341	341	none
Calhoun	19	19	none
Carroll	0	0	NA
Chickasaw	52	52	none
Choctaw	0	0	NA
Claiborne	44	44	none
Clarke	20	20	none
Clay	208	207	-0.5%
Coahoma	949	949	none
Copiah	105	105	none
Covington	93	93	none
DeSoto	2,683	2,584	-3.7%
Forrest*	2,518	2,422	-3.8%
Franklin	0	0	NA
George	151	151	none
Greene	0	0	NA
Grenada	718	758	5.6%
Hancock	831	836	0.6%
Harrison	9,605	9,721	1.2%
Hinds	5,875	5,725	-2.6%
Holmes	54	54	none
Humphreys	60	60	none
Issaquena	0	0	NA
Itawamba	165	165	none
Jackson	2,448	2,566	4.8%
Jasper	26	26	none
Jefferson	0	0	NA
Jefferson Davis	40	40	none
Jones	739	596	-19.4%
Kemper	32	32	none
Lafayette	714	794	11.2%

County	Hotel/Motel Rooms (6-30-11)	Hotel/Motel Rooms (6-30-12)	Percentage Change
Lamar*			*
Lauderdale	1,929	1,929	none
Lawrence	30	30	none
Leake	56	56	none
Lee	1,948	1,802	-7.5%
Leflore	819	819	none
Lincoln	406	406	none
Lowndes	966	958	-0.8%
Madison	2,066	2,024	-2.0%
Marion	120	120	none
Marshall	175	203	16.0%
Monroe	247	247	none
Montgomery	235	215	-8.5%
Neshoba	1,562	1,562	none
Newton	103	103	none
Noxubee	64	64	none
Oktibbeha	806	689	-14.5%
Panola	499	499	none
Pearl River	399	393	-1.5%
Perry	0	0	NA
Pike	620	623	0.5%
Pontotoc	56	56	none
Prentiss	80	80	none
Quitman	0	0	NA
Rankin	2,261	2,302	1.8%
Scott	221	221	none
Sharkey	19	19	none
Simpson	190	190	none
Smith	33	33	none
Stone	175	175	none
Sunflower	235	204	-13.2%
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	70	70	none
Tishomingo	130	130	none
Tunica	6,107	6,107	none
Union	349	349	none
Walthall	30	30	none
Warren	2,366	2,366	none
Washington	1,254	1,163	-7.3%

County	Hotel/Motel Rooms (6-30-11)	Hotel/Motel Rooms (6-30-12)	Percentage Change
Wayne	129	129	none
Webster	48	48	none
Wilkinson	18	18	none
Winston	213	213	none
Yalobusha	20	20	none
Yazoo	212	212	none
Total	57,451	56,897	-1.0%

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between May – November 2012, cabins, or condo/timeshare/cottage rooms. County room counts are based on figures provided by a variety of sources. A different official may have furnished the data between one year and the next. Smith Travel (STR) inventory data were used for FY 2011 – FY 2012 updates. Some counties reflected declines in hotel/motel room inventory for various reasons. The 56,897 estimated hotel/motel rooms as of June 30, 2012 is close to STR's 56,839 quarterly census total for Mississippi.

\* Lamar County totals are included in Forrest County, as part of the Hattiesburg Area.

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Inc. Hendersonville, Tennessee, 2012.

## Appendix H

### MISSISSIPPI'S FIVE TOURISM REGIONS

The Capital/River Region	The Coastal Region	The Delta Region	The Hills Region	The Pines Region
Adams	Covington	Bolivar	Alcorn	Attala
Amite	Forrest	Carroll	Benton	Chickasaw
Claiborne	George	Coahoma	Calhoun	Choctaw
Copiah	Greene	Holmes	DeSoto	Clarke
Franklin	Hancock	Humphreys	Grenada	Clay
Hinds	Harrison	Issaquena	Itawamba	Jasper
Jefferson	Jackson	Leflore	Lafayette	Kemper
Lawrence	Jefferson Davis	Quitman	Lee	Lauderdale
Lincoln	Jones	Sharkey	Marshall	Leake
Madison	Lamar	Sunflower	Panola	Lowndes
Pike	Marion	Tallahatchie	Pontotoc	Monroe
Rankin	Pearl River	Tunica	Prentiss	Montgomery
Simpson	Perry	Washington	Tate	Neshoba
Walthall	Stone	Yazoo	Tippah	Newton
Warren	Wayne		Tishomingo	Noxubee
Wilkinson			Union	Oktibbeha
			Yalobusha	Scott
				Smith
				Webster
				Winston

SOURCE: Mississippi Development Authority Tourism Division, 2012.



Mississippi Development Authority Tourism Division

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