

Fiscal Year 2010 Economic Contribution
of
Travel and Tourism
In Mississippi
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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-seven local entities with a Travel and Tourism component were in place as of February 2011. They include 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 \$704 billion in direct domestic and international expenditures with 7.4 million direct jobs, 10.1 million workers directly and indirectly employed by travel, \$186.3 billion in payroll income, and \$113 billion in combined federal, state and local tax revenues, per the U.S. Travel Association, CY 2009 data. Travel and Tourism is a key part of Mississippi's economic development engine.

This report on Mississippi estimates Travel and Tourism's FY 2010 economic contribution at the state and county level. This industry is vital to Mississippi's economy, based on these estimates:

- Travel and Tourism accounted for 78,485 direct jobs in FY 2010, versus 78,240 in FY 2009, or +0.3 %. Travel and Tourism comprised 7.2 % of FY 2010 total statewide establishment-based employment. Some 76,280 of these FY 2010 jobs, or 97.1 %, were created in the private sector.
- Travel and Tourism comprised 32,130 indirect & induced jobs in FY 2010. Travel and Tourism total employment [direct + indirect + induced] was 110,615, or 10.2 % of statewide employment.
- Travel and Tourism ranked 5th in FY 2010 direct private sector employment, for all sectors.
- FY 2010 Travel and Tourism annual payroll for direct jobs was \$1.66 billion, \$33 million more, or a 1.9 % increase from the \$1.63 billion annual payroll in FY 2009. The FY 2010 indirect & induced labor income was \$872 million. Total FY 2010 labor income (direct payroll plus indirect plus induced labor income) was \$2.53 billion, a 1.4 % increase compared to FY 2009.
- Travel and Tourism is one of Mississippi's largest export industries, and a major contributor to its financial affairs and quality of life.
- Without Travel and Tourism: \$354 million less in General Fund Revenues; 110,615 fewer total jobs [direct + indirect + induced]; \$2.5 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.
- \$5.5 billion in FY 2010 Travel and Tourism expenditures by visitors, a 1.4 % decrease versus \$5.6 billion in FY 2009.
- Out-of-state visitors spent \$1,610 for every man, woman and child living in Mississippi.
- In-state travelers spent \$240 for every man, woman and child living in Mississippi.
- Travel and Tourism's proportion of Mississippi's FY 2010 General Fund—\$353.6 million of \$4.37 billion—was 8.1 %, or \$1 of every \$12. The \$353.6 million was a 0.9 % decrease versus \$356.8 million in FY 2009 Travel and Tourism General Fund revenues.
- FY 2010 Tourism Capital Investment (TCI)—new/renovated contract construction costs—was \$205.6 million, a 26.2 % decrease from FY 2009.
- FY 2010 Travel and Tourism state taxes/fees collected = \$415.4 million, a 0.2 % decrease compared to FY 2009. These FY 2010 state taxes/fees translated to \$371 per household in tax relief, a 0.8 % decrease compared to the estimated \$374 per household in tax relief for FY 2009.
- FY 2010 state-licensed casino taxes attributed to Travel and Tourism of \$134 million, 70.2 % of approximately \$191.2 million in Travel and Tourism state taxes collected.
- FY 2010 City/County tax revenues (Room/Restaurant, state-licensed casinos, motor vehicle rental, Alcohol Beverage Control, petroleum) = \$111.5 million, a 0.2 % decrease from FY 2009.
- Statewide hotel/motel rooms increased from 56,212 on June 30, 2009, to 57,243 on June 30, 2010, or +1.8 %. Hotels/motels totaled 659 on June 30, 2009, and 660 on June 30, 2010, + 0.2 %.
- Mississippi's estimated 19.5 million total visitors in FY 2010, a 2.6 % increase from FY 2009, 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. The overnight leisure segment included paid accommodations and visiting friends and relatives.
- About 69 % of all domestic visitors overnights in the state; with leisure trips broken down by 72 % overnight and 28 % - day.
- 78 % of these FY 2010 visitors to Mississippi, were from out-of-state, or "Travel and Tourism Exports." They spent "new" dollars in Mississippi for goods and services.
- An estimated 87 % of all FY 2010 household travel party expenditures were from out-of-state.
- Travel and Tourism's estimated portion of the Gross State Product (GSP) was 4.2% in FY 2010, and 4.0 % in FY 2009.
- FY 2010 Total Payroll (Labor Income) associated with Travel and Tourism = 2.7 % of GSP.
- FY 2010 Welcome Center registrants were 1,995,338, a 16.6 % decrease versus the 2,391,959 for FY 2009. Some of the Welcome Centers were closed during portions of FY 2010.
- Twelve Mississippi counties with \$120 million+ in FY 2010 Travel and Tourism expenditures.
- Sixteen Mississippi counties with more than 1,200 direct Travel and Tourism jobs in FY 2010.

Estimated FY 2010 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 both 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 2010 statewide economic contribution in terms of 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, and the Vicksburg and Columbus headquarters of the 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, were the Mississippi Arts Commission (MAC); Department of Marine Resources (DMR); Mississippi Department of Archives and History (MDAH); Department of Wildlife, Fisheries & Parks (DWF&P), including the Mississippi Museum of Natural Science; Pearl River Basin Development District; and Pearl River Water Supply District.

FY 2010 employment and payroll data were primarily calculated from quarterly figures compiled by the Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department. An FY 2010 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, 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 13-15. The focus is on Gross State Product, 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.

FINDINGS

Gaming (state-licensed), Restaurant and Lodging jobs were the top three in direct Travel and Tourism Employment, in Mississippi, based on Appendix A. The 26,590 state-licensed casino gaming jobs, including casino hotels, equaled 33.9 % of direct Travel and Tourism Employment. All other 51,895 direct Travel and Tourism jobs were 66.1 % of these direct jobs.

Appendix A comprises Travel and Tourism direct employment breakdown by category for FY 2009 and 2010. The narrative section on page 13 summarizes data on indirect & induced jobs. Appendix B shows FY 2009 and 2010 payroll-related information by employment component. The indirect & induced labor income multipliers are presented on page 13.

Estimated Travel and Tourism expenditures by visitors were \$5.6 billion in FY 2009 and \$5.5 billion in FY 2010, per Appendix C. FY 2009 and 2010 estimated General Fund revenues are Appendix D. They were \$357 million in FY 2009 and \$354 million in FY 2010. Travel and Tourism's \$354 million slice of the FY 2010 General Fund was 8.1 %, from estimated Tourism Capital Investment (TCI), Travel and Tourism Personal Income, Sales Taxes and other taxes.

Appendices E and F, respectively, have estimated FY 2009/2010 county level Travel and Tourism Expenditures, direct Travel and Tourism Employment, the Travel and Tourism employment percentage, State and Local Sales Taxes attributed to Travel and Tourism, and TCI data. Appendix G presents the FY 2009 and 2010 statewide and county wide 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 2010 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 2010, with 1,995,338 registrants out of 2,485,233 persons serviced. Most Welcome Center registrants are U.S. residents. International travelers, in FY 2010, comprised 44,592, or 2.2 % of the 1,995,338 registrants. This proportion was 2.1 % in FY 2009 based on 50,186 international registrants.

U.S. registrants decreased by - 16.7 % between FY 2009 and FY 2010; the international segment decreased by - 11.1 %; and total registrants decreased by - 16.6 %, per Table 1. Several Centers were closed for long periods. Mississippi, Louisiana, Alabama, Texas, Florida and Georgia held the top six spots in FY 2009/2010, per Tables 2 and 3. Canada had the top international registrants —32.8 % market share in FY 2009; 37.6 % market share in FY 2010, per Tables 4 and 5.

Welcome Center Reservation Service

The Welcome Center Reservation Service enables travel counselors to make reservations for tourists/visitors in any hotel/motel, bed and breakfast, or campground that accepts those reservations. This Reservation Service completed its 16th year of operation in June 2010 with \$213,915 in revenue, 2,556 reservations and 3,231 room nights booked.

Regional Airport/Air Passenger Data

Mississippi’s Regional/International Airports reported 1,132,101 enplanements in FY 2010, a 1.5 % decrease from FY 2009. These Airports, plus Tunica County’s Airport, had 147,557 total charter flight enplanements in FY 2010, + 0.6 % versus FY 2009.

The Jackson-Evers International Airport enplaned 618,258 passengers, or 54.6 %, of all passengers enplaned in Mississippi. Its 40 daily nonstop flights to 10 cities/12 airports, included Atlanta, Baltimore, Charlotte, Chicago, Dallas, Detroit, Houston, Memphis, Orlando, and Washington, D.C. Jackson-Evers reported \$4.5 million in capital improvement projects during FY 2010. This airport is a vital cog for the state’s air traffic activity.

Gulfport-Biloxi’s International Airport reported 427,846 enplanements in FY 2010 (July 2009 - June 2010), a 1.5 % increase versus 421,322 in FY 2009. Their five carriers: ASA/Delta, American, Continental, Northwest and USAir. Cities served by the end of FY 2010: Atlanta, Charlotte, Dallas-Ft. Worth, Houston, Memphis, and Tampa. They cited \$12.1 million in estimated FY 2010 capital expenditures and improvements.

FY 2010 charter flights: Gulfport-Biloxi—570 flights/81,228 passengers, with many cities in the mix: Cleveland, Oklahoma City, St. Louis; Hattiesburg-Laurel—7 flights/929 passengers; Golden Triangle—39 flights, 2,561 passengers; Tupelo—10 flights/231 passengers; Mid-Delta—15 flights, 1,000 passengers.

Tunica County’s Airport had 1,208 charter flights and 61,608 charter enplanements in FY 2010, with 93 U.S. cities including Atlanta, Austin, Fort Myers, Tulsa Some \$3.3 million in estimated net capital expenditures and improvements were made to this Airport in FY 2010.

Motor Coach Snapshot

The FY 2010 snapshot featured feedback from 11 Tourism Partners, plus some additional data gleaned from quarterly Welcome Center reports with Motor Coach registrant information. Some 609,103 passengers were on 16,612 tours, or 36.7—on average—per tour. The 2,461 overnight tours comprised 14.8 % of total tours. Average number of nights equaled 1.75. Tour expenditures were \$57.3 million. Average tour expenditures = \$3,452, with a wide range. The 609,103 reported group passengers were 3.1 % of 19.5 million estimated statewide visitors.

Amtrak

Amtrak serves Mississippi with three long-distance trains: City of New Orleans (daily Chicago-New Orleans via Jackson); The Crescent (daily New Orleans-Atlanta-New York via Meridian); and the Sunset Limited (tri-weekly Orlando-New Orleans-Los Angeles via Biloxi). Eleven Mississippi Stations include Bay St. Louis (Special Train), Brookhaven, Greenwood, Hattiesburg, Hazlehurst, Jackson, Laurel, McComb, Meridian, Picayune and Yazoo City. Total ridership in Mississippi was 61,245, 32nd in the U.S. and 2nd in the five-state region of contiguous states: Alabama, Arkansas, Louisiana (1st in this “region”), Mississippi and Tennessee.

TABLE 1

ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY U.S. AND INTERNATIONAL TRAVELERS, FY 2009 AND FY 2010

Origin	FY 2009 Registrants	FY 2010 Registrants	Percentage Change
States	2,341,773	1,950,746	-16.7%
Countries	50,186	44,592	-11.1%
Total	2,391,959	1,995,338	-16.6%

NOTE: Tables 1-5 only reflect those visitor who completed the registration forms.
SOURCE: Mississippi Development Authority/Tourism Division, 2010.

TABLE 2

HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN STATES, FY 2009

State	Registrants	Percentage of States	Percentage of Top Ten
Louisiana	462,839	19.8%	23.7%
Mississippi	427,630	18.3%	21.9%
Alabama	237,098	10.1%	12.1%
Texas	213,841	9.1%	10.9%
Florida	170,819	7.3%	8.7%
Georgia	134,682	5.8%	6.9%
Tennessee	117,284	5.0%	6.0%
Arkansas	81,458	3.5%	4.2%
Missouri	57,383	2.5%	2.9%
Illinois	50,109	2.1%	2.6%
Other	388,630	16.6%	NA
Total	2,341,773	100.0%	100.0%

SOURCE: Mississippi Development Authority/Tourism Division, 2009.

TABLE 3

HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN STATES, FY 2010

State	Registrants	Percentage of States	Percentage of Top Ten
Mississippi	361,016	18.5%	22.8%
Louisiana	281,705	14.4%	17.8%
Alabama	205,987	10.6%	13.0%
Texas	186,037	9.5%	11.7%
Florida	135,791	7.0%	8.6%
Georgia	119,767	6.1%	7.6%
Tennessee	112,046	5.7%	7.1%
Arkansas	79,812	4.1%	5.0%
Missouri	55,520	2.8%	3.5%
Illinois	48,316	2.5%	3.0%
Other	364,749	18.7%	NA
Total	1,950,746	100.0%	100.0%

SOURCE: Mississippi Development Authority/Tourism Division, 2010.

TABLE 4

HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN COUNTRIES, FY 2009

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	16,445	32.8%	41.1%
England	6,416	12.8%	16.0%
Germany	5,698	11.4%	14.2%
Mexico	5,033	10.0%	12.6%
France	2,246	4.5%	5.6%
Australia	1,261	2.5%	3.2%
Holland	1,242	2.5%	3.1%
Sweden	625	1.2%	1.6%
Switzerland	562	1.1%	1.4%
Norway	502	1.0%	1.3%
Other	10,156	20.2%	NA
Total	50,186	100.0%	100.0%

SOURCE: Mississippi Development Authority/Tourism Division, 2009.

TABLE 5

HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN COUNTRIES, FY 2010

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	16,771	37.6%	45.8%
Germany	5,274	11.8%	14.4%
England	4,852	10.9%	13.3%
Mexico	3,375	7.6%	9.2%
France	2,022	4.5%	5.5%
Australia	1,369	3.1%	3.7%
Holland	1,335	3.0%	3.6%
Switzerland	633	1.4%	1.7%
Sweden	479	1.1%	1.3%
Japan	476	1.1%	1.3%
Other	8,006	18.0%	NA
Total	44,592	100.0%	100.0%

SOURCE: Mississippi Development Authority/Tourism Division, 2010.

GAMING

Mississippi had 30 state-licensed casinos as of June 30, 2010 versus 30 state-licensed casinos as of June 30, 2009, no change. There were 30 state-licensed casinos as of 2/24/2011.

Gaming Revenues

Total state-licensed casino gross gaming revenues were \$2.4 billion in FY 2010. Some \$1.68 billion, or 70.1 %, were the estimated “net” tourist/visitor share. This \$1.68 billion comprised 30.6 % of the \$5.5 billion in statewide Travel and Tourism expenditures.

Mississippi’s total gaming-related tax revenues were \$287 million in FY 2010--\$191.2 million in state receipts; \$95.8 million for cities/counties. Travel and Tourism accounted for an estimated \$134 million [of \$191.2 million-state] and \$67 million [of \$95.8 million-local]. Of the \$191.2 million, \$155.2 million in gross gaming state tax receipts, or 81.2 %, went into the General Fund; \$36 million, or 18.8 %, was diverted to MDOT. Travel and Tourism’s estimated slice of the \$155.2 million in General Fund gaming dollars was \$108.8 million, or 70.1 %. The \$108.8 million = 30.8 % of Travel and Tourism’s \$354 million contribution to the General Fund.

FY 2009/2010 state-licensed casino gross gaming revenue market share by Gaming Region—North and South River and Coastal—comprise Table 6. Table 7 includes the percentage change in gross gaming revenue by Regions between FY 2009/2010.

Mississippi Gaming Commission (MGC) Quarterly Survey Trends

Some 70 % of all FY 2010 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 North River Region had 82 % of out-of-state patrons, due to Arkansas, Tennessee, Illinois, Missouri, Oklahoma, Alabama, and Georgia patrons. Around 33 % of South River Region—Greenville, Natchez and Vicksburg—casino patrons came from out-of-state; e.g., Arkansas and Louisiana. And 74 % of Coastal Region casino patrons lived out-of-state; e.g., Louisiana, Florida, Alabama, Georgia and Texas.

Thirty state-licensed casinos plus their hotels contributed a FY 2010 payroll of \$754.2 million, down 4.7 % from FY 2009. FY 2010 advertising and promotional expenditures attributed to state-licensed casinos were \$82.5 million, an 18.1 % decrease versus FY 2009. Casino hotel indicators, by three gaming regions, are in Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY 2009/2010 quarterly averages. State-licensed casino hotel rooms increased from 12,274 (FY 2009) to 12,295 (FY 2010), or by 0.2 %.

An estimated \$54.7 million in Tourism Capital Investment (TCI) for casinos/amenities were attributed to the state-licensed casinos and/or new development in FY 2010, or 26.6 % of the statewide TCI. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. and do not include land acquisition/gaming equipment, or site prep.

Gaming Employment

FY 2010 quarterly casino employment data came from LMI quarterly surveys. They reflected 26,590 state-licensed casino employees plus persons employed at their hotels. These 26,590 casino plus casino hotel jobs were 33.9 % of statewide direct Travel and Tourism jobs.

NonGaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$250.5 million in FY 2010, 2.0 % less than FY 2009; food and beverage revenue accounted for \$425 million, - 10.7 % versus FY 2009. FY 2010 other nongaming revenue was \$108.6 million. All dollar amounts are gross sales. They are significant, but many lodging, food & beverage, and other amenities/services are complimentary.

TABLE 6

GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2009 AND FY 2010

Region	FY 2009 Gross Gaming Revenue	Percentage of FY 2009 Total	FY 2010 Gross Gaming Revenue	Percentage of FY 2010 Total
Coastal	\$1,172,629,002	45.4%	\$1,099,380,000	45.9%
North River	1,053,877,769	40.8%	953,243,203	39.8%
South River	357,953,603	13.9%	344,963,884	14.4%
Total	\$2,584,460,374	100.0%	\$2,397,587,087	100.0%

SOURCES: Mississippi Gaming Commission and the Department of Revenue, 2010.

TABLE 7

GROSS GAMING REVENUE PERCENTAGE CHANGE BY REGION, FY 2009 AND FY 2010

Region	FY 2009 Gross Gaming Revenue	FY 2010 Gross Gaming Revenue	Percentage Change
Coastal	\$1,172,629,002	\$1,099,380,000	-6.2%
North River	1,053,877,769	953,243,203	-9.5%
South River	357,953,603	344,963,884	-3.6%
Total	\$2,584,460,374	\$2,397,587,087	-7.2%

NOTE: Table 6 and Table 7 reflect Gaming Revenue Region shares. Coastal revenues are for cities in Hancock and Harrison counties. North River revenue reflect Coahoma County and Tunica County. South River 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, 2010.

TABLE 8

SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2009

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	9	5,558	83.7	\$76.06
North River	12	5,892	80.5	58.11
South River	8	824	64.4	67.18
Total/Average	29	12,274	80.9	\$67.00

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, 2009-2010.

TABLE 9

SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2010

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	9	5,558	83.3	\$79.28
North River	12	5,893	78.4	52.01
South River	8	844	64.2	62.52
Total/Average	29	12,295	79.6	\$63.05

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, 2009-2010.

OUTDOOR RECREATION/GOLF

Employment, payroll and revenue figures for the DWFP, 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. Table 10 lists FY 2010 park visitation. Per the MDA/Tourism Division's Program Manager—Outdoor and Sports Marketing: "The economic contribution of outdoor recreation is felt far and wide all across the state and its participant pockets are deep." This is substantiated by two reports conducted by the U.S. Fish and Wildlife Service entitled, 2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation-National Overview and State Overview. These reports followed the 2006 national census and conducted interviews of citizens' activity rates in outdoor recreation including hunting, fishing, and wildlife watching.

Fishing expenditures totaled \$239.2 million while hunters spent \$557.6 million. Wildlife watchers spent \$181.8 million. These expenditures include trip expenses for fishing and hunting of \$101.7 million and \$136.2 million, respectively. Fishermen spent \$118.9 million on equipment; hunters spent \$178.9 million. The report's breakdown includes food and lodging, transportation, other trip costs, fishing and hunting equipment, auxiliary and special equipment.

Per the Professional Golf Association (PGA) of America, Mississippi's 174 total golf courses as of June 2010 included 96 public, semi-private, municipal/military or resorts, 55.2 % of the statewide total. Sixty-five of these 96 courses, 67.8 %, were daily fee/semi-private; 24, or one-fourth, comprised municipal/military; with seven, 7.3 %, classified as resorts. There were another 78 private courses, 44.8 % of statewide golf courses.

The Inaugural Mississippi Gulf Resort Classic, an official PGA TOUR Champions Tour event, was held April 26- May 1, 2010 at Fallen Oak. With an estimated attendance of 50,000 throughout the entire tournament week, this first year event introduced the world to the hospitality of the Mississippi Gulf Coast. Over 1,000 volunteers from four different states joined the 78 Champions Tour players for a week of food, fun and professional golf.

TABLE 10

STATE PARK VISITATION, FY 2009/FY 2010

Park	FY 2009 Visits	FY 2010 Visits	Change
Buccaneer State Park	0	6,392	NA
Clark Creek	7,243	8,656	19.5%
Clarkco	68,698	62,106	-9.6%
George P. Cossar	52,043	55,951	7.5%
Golden Memorial	9,978	7,960	-20.2%
Great River Road	9,973	16,263	63.1%
Holmes County	43,063	36,185	-16.0%
Hugh White	57,417	53,514	-6.8%
J.P. Coleman	92,311	90,680	-1.8%
John W. Kyle	66,783	61,760	-7.5%
Lake Lincoln	50,929	51,594	1.3%
Lake Lowndes	88,074	89,985	2.2%
LeFleur's Bluff	148,569	127,528	-14.2%
Legion	20,752	18,736	-9.7%
Leroy Percy	19,099	17,178	-10.1%
Natchez	23,875	22,650	-5.1%
Paul B. Johnson	138,033	131,771	-4.5%
Percy Quin	72,269	69,103	-4.4%
Roosevelt	88,205	86,354	-2.1%
Shepard	7,694	9,025	17.3%
Tishomingo	58,479	58,643	0.3%
Tombigbee	27,192	25,607	-5.8%
Trace	58,606	62,194	6.1%
Wall Doxey	58,880	47,574	-19.2%
Total	1,268,165	1,217,409	-4.0%

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2010.

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 employment, General Fund revenues, construction activity, among other components—since the late 1990s. Mississippi's economy without Travel and Tourism, if other sectors stayed constant: \$354 million less in General Fund Revenues; 110,615 fewer total jobs [direct, indirect, induced] and \$2.5 billion less in annual payroll associated with this industry; quality of life issues, etc.

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

The Gross State Product (GSP)—the counterpart to Gross Domestic Product (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 GSP 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 estimated Travel and Tourism's Total Value Added—the contribution of an industry to GDP or GSP. This includes its proportion of the GSP, the indirect & induced share of Travel and Tourism Employment and Labor Income, the effective tax rates for personal income tax, sales tax/other taxes, plus other economic indicators.

The direct, indirect and induced effects of 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, Tourism Capital Investment (TCI), among other codes. The result was Travel and Tourism's Total Value Added as a percentage of the state total.

Mississippi's GSP was \$89 billion in FY 2009 and an estimated \$93.1 billion in FY 2010. About ¼ of Mississippi's GSP was in Goods-Producing Sectors; ¾ in Services-Producing Sectors. Travel and Tourism's Total Value Added of Mississippi's GSP, was \$3.9 billion, or 4.2 %, in FY 2010; and \$3.54 billion, or 4.0 % in FY 2009. Travel and Tourism's 4.2 % total contribution to the GSP is lower than its Employment concentration of 7.2 % and its 8.1 % share of General Fund Revenues. Direct portion only of FY 2010 Total Value Added to expenditures shows 46 cents out of each Tourist Dollar spent, including TCI, eventually stays in Mississippi.

Food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation, TCI and transportation were part of the Travel and Tourism Industry GSP. Casino gaming, food services and drinking places, and lodging were a major portion of this Industry GSP in FY 2010. Its composite nature needs to be emphasized.

Mississippi's economy had an unemployment rate of 10.7 %, based on a 12-month moving average [January-December 2010]. The civilian labor force was 1.3 million, with an average of 139,400 unemployed persons. Metropolitan Statistical Areas (MSAs) for counties with significant Travel and Tourism activity had these unemployment rates: 9.0 % for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 9.9 % for Pascagoula (Jackson and George counties); 8.7 % for Hattiesburg (Forrest, Lamar and Perry counties); and 8.5 % for Jackson (Copiah, Hinds, Madison, Rankin and Simpson counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, together, are a consolidated MSA with a 9.3 % unemployment rate. DeSoto County's unemployment rate = 8.0 %; Tunica County's was 17.4 % (both in Memphis' MSA).

Travel and Tourism Employment Multipliers (Indirect & induced)

IMPLAN includes the indirect (business or firm level) and the induced (personal or individual level) multipliers. Taken together—direct + indirect + induced divided by the direct contribution—provides an estimate of the employment multiplier filtered through a Social Accounting Matrix (SAM). FY 2009 and 2010 Employment Multipliers for Mississippi were 1.41. The 78,240 estimated statewide direct FY 2009 Travel and Tourism jobs resulted in an additional 31,760 indirect plus induced jobs, while the 78,485 statewide direct Travel and Tourism jobs in FY 2010 resulted in an additional 32,130 indirect plus induced jobs. Total FY 2010 jobs associated with Travel and Tourism were 110,615, or 10.2 % of statewide nonfarm employment. FY 2010 Employment multipliers varied—1.59 for lodging, 1.26 for food services and drinking places, among others.

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 by the individual (induced). The FY 2009 Labor Income Multiplier for Mississippi was 1.54 with Total labor income of \$2.5 billion—\$1.63 billion (direct) and \$873 million (indirect & induced). Mississippi's FY 2010 Travel and Tourism Labor Income Multiplier was 1.53 based on total labor income of \$2.5 billion—\$1.66 billion (direct) and \$872 million (indirect & induced). IMPLAN codes were used to compute the FY 2009/2010 Labor Income Multipliers. The \$2.5 billion in FY 2010 total labor income was 2.7 % of Mississippi's \$93.1 billion GSP.

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 nearly \$4.8 billion in Mississippi, or 86.9 % of the \$5.5 billion spent by visitors in FY 2010. Mississippians

spent \$3.7 billion traveling out-of-state, per estimates. Mississippians traveling within the state—50 miles or more, one-way—spent an estimated \$720 million on FY 2010 in-state trips, or 13.1 % of the \$5.5 billion spent in Mississippi. Travel and Tourism economy expenditures were \$9.2 billion—expenditures by out-of-state visitors in Mississippi + Mississippians traveling out-of-state + in-state visitors.

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, plus a construction activity tax that go to the General Fund. An estimated \$88.2 million in Travel and Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2010, a 0.9 % increase over FY 2009. The \$6.5 million from estimated Travel and Tourism construction activity taxes into the FY 2010 General Fund declined by 26.4 % versus FY 2009.

Employment Rankings

Travel and Tourism ranked 5th in total estimated private FY 2010 direct employment, behind, Wholesale/Retail Trade, Manufacturing, Health Care & Social Assistance, and Professional & Business Services. Most of the direct FY 2010 Travel and Tourism jobs— 76,245 of the 78,485 statewide direct Travel and Tourism jobs—or 97.1 %—were private sector ones (hotels/motels, restaurants, casinos, recreation, etc.). The other 2.9 % 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 78,485 statewide direct Travel and Tourism jobs in FY 2010 equaled 7.2 % of all establishment-based nonfarm jobs, per Appendix F. The 78,240 statewide direct Travel and Tourism jobs in FY 2009 were 7.0 % of all jobs, per Appendix E. Nonfarm employment rankings reflect sectors/super sectors, per their definition on page 21. Table 11 is Mississippi's FY 2010 nonfarm, establishment-based employment rankings by the top sectors/super sectors.

TABLE 11

MISSISSIPPI NONFARM ESTABLISHMENT-BASED
EMPLOYMENT RANKINGS, DIRECT JOBS,
TOP SECTORS/SUPER SECTORS, FY 2010

Sector	FY 2010 Establishment Based Employment	FY 2010 Employment Percentage	FY 2010 Rank
Government (1)	248,935	22.9%	1
Wholesale/Retail Trade (2)	159,500	14.7%	2
Manufacturing (3)	138,100	12.7%	3
Educational & Health Services (4)	132,025	12.1%	4
Professional & Business Services (5)	85,045	7.8%	5
Travel and Tourism (6)	78,485	7.2%	6
Assorted Leisure & Hospitality (7)	54,475	5.0%	7
Construction (8)	46,395	4.3%	8
Financial Activities	45,210	4.2%	9
Transportation&Warehouse/Utilities (9)	43,730	4.0%	10
Other Services (10)	34,760	3.2%	11
Information	12,525	1.2%	12
Mining & Logging	8,290	0.8%	13
Total Employment	1,087,475	100.0%	NA

1. Excludes an estimated 2,240 Travel and Tourism jobs funded by public monies--State Tourism Office, Regional/International Airports, Museums, Historical Sights, Performing Arts, etc. It includes all public sector employment--Health Care, Education, etc.
2. Retail Trade was the dominant component with 124,535 non-Travel and Tourism jobs. Does not include an estimated 8,200 Travel and Tourism jobs directly related to Retail Trade.
3. Durable goods comprised 88,240 jobs, or 63.9 % of Manufacturing jobs.
4. Health Care & Social Assistance was the dominant component with 118,425 jobs.
5. Excludes Travel and Tourism-related Advertising.
6. 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 Tourist/Visitor on page 21. Appendix A includes a breakdown of the FY 2010 direct statewide Travel and Tourism jobs.
7. Reflects the Leisure & Hospitality employment not directly related to Travel and Tourism.
8. Excludes Travel and Tourism-related Construction.
9. Excludes Travel and Tourism-related Transportation.
10. Excludes Travel and Tourism-related Laundry Services, Passenger Car Rental, and Travel Arrangement/Reservations.

NOTE: Some monthly averages were subject to a second and final revision at the time this Appendix was published. Thus, employment data are subject to change.

SOURCE: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2010.

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, 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 \$73 million or 65.5 % of the estimated \$111.5 million in City/County taxes/fees attributed to Travel and Tourism came from state-licensed casinos, with \$38.5 million, or 34.5 %, from Room/Restaurant special tax revenues, Seawall Taxes for coastal counties, ABC permit license fees, petroleum taxes, motor vehicle rentals and TCI permit fees. MDA/Tourism's Division 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 2010 tabulations were made for nearly 300 municipalities. It's estimated that \$40.1 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 level 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 %. Table 12 has tax percentages by jurisdiction, plus FY 2010 gross Travel and Tourism special tax revenue. About \$36.9 million, or 69 %, of gross FY 2010 special tax revenues were from restaurant sales, with \$16.5 million, or 31 %, from lodging sales. Special gross FY 2010 tax revenues totaled \$53.4 million.

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

FY 2009/2010 Travel and Tourism expenditures/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. Smith Travel Research (STR) data are cited in this section.

Mississippi had 660 total hotel/motel properties as of June 30, 2010, per a county wide lodging census conducted by MDA/Tourism Division, and using STR data. The number of statewide hotel/motel rooms increased from 56,212 as of June 30, 2009, to 57,243 as of June 30, 2010, or +1.8 %, per Appendix G. An estimated 570 new statewide hotel/motel rooms were under construction from July 2010 – January 2011, or 1.0 % above June 2010 inventory levels.

Mississippi's inventory included an estimated 201 Bed & Breakfasts (B & B's) as of June 30, 2010, with 892 total B & B rooms, 639 cabin rooms, 1,306 condo/timeshare rooms, 13,092 recreational vehicle (RV) spaces with electricity and water, 1,192 camp sites without hook-up, and 55 lodges with a maximum capacity of 1,070, or 19-20, on average, per lodge.

The FY 2010 statewide average daily rate (ADR), based on STR was \$74.36. Mississippi's FY 2010 statewide occupancy percent was 52.6 using STR data for corporate & franchise properties. State-licensed casino hotels had a 79.6 occupancy percent, much higher than STR data, per Table 9, but many were comped. Their ADR was \$63.05. State-licensed casino hotel rooms totaled 12,295, or 21.5 %, of FY 2010 statewide hotel/motel rooms.

Travel and Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY 2010

Twenty-eight Tourism Partners—CVB's, Tourism Commissions, Partnerships—received FY 2010 Advertising and Employment/Payroll mini-surveys for October 2009 – September 2010. Twenty-one, or $\frac{3}{4}$, responded to the Employment/Payroll survey; 20, or 71 %, to Advertising.

FY 2010 Travel and Tourism Employment/Payroll data reflected 157 full-time equivalent staff with \$6.8 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 2010 Tourism Budget of \$19.9 million.

About \$9.34 million were spent by the respondents, based on the FY 2010 Advertising survey, with \$3.92 million, or 41.9 %, on Ad Placement. Respondents spent: \$659,780 in Ad Agency retainer fees; \$556,176 in Ad Production costs; \$255,294 for Promotional items; \$290,037 for Trade Show Participation costs; \$64,324 for FAM Tours; \$234,693 for Billboard Advertising; \$561,538 for Brochure, Collateral and Other Printing; \$1,712,313 in Sponsorships and Local Events; \$570,985 for web site maintenance; and \$520,602 from all Grant Programs.

MDA/Tourism Division helped administer \$4 million in advertising funds from British Petroleum as part of Phase I, May-June 2010 (state FY 2010). These funds—not included in the prior paragraph breakdown—were used by Mississippi Gulf Coast entities to promote Travel and Tourism activity in their 3-county area. Another \$11 million was set aside for this in FY 2011.

STATEWIDE TRAVEL AND TOURISM LINKS

Film Productions, Documentaries and Commercials

The Mississippi Motion Picture Incentive Program was successful in supporting the development of local production and attracting nationally recognized documentary production. The low minimum spend of \$20,000, one of the lowest in the country, is suited to smaller projects and local producers. The program includes a 20 % 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 exemptions and 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 ground breaking 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. With the imminent launch of the Mississippi Work Force Training curriculum, Mississippi has now taken two giant steps forward as a Southern production center, seeking to attract out-of-state production and develop Mississippi filmmaking.

In FY 2010, the Mississippi Film Office coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films, and commercials. While each project created direct economic impact 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.

Greenwood was host to the biggest production of the year with the DreamWorks feature film *THE HELP* based on the novel by Mississippi native Kathryn Stockett. The Gulf Coast hosted the PBS series *ANTIQUES ROAD SHOW*; Canton served as the base for independent films *RITES OF SPRING* and *BIG BAD*; Berlin Festival nominee *THE DYNAMITE* shot in *RISING*; numerous documentaries, regional commercials, television episodes, and short films were located around the state.

The Mississippi Film Office again sponsored, through incentive grants and support, the Magnolia Independent Film Festival (Starkville), the Tupelo Film Festival, the Crossroads Film Festival (Jackson), the Natchez Literary and Cinema Celebration, the Mississippi International Film Festival, and the Oxford Film Festival. Additionally, it supported the Southern Circuit Film Series at Millsaps College and provided funding to film programs (Crossroads Film Society, Mississippi Film and Video Alliance, Barefoot Workshops) in support of Mississippi filmmakers and audiences.

Selected State Agencies with Travel and Tourism Links: FY 2010 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 TCI and tourist/visitor expenditures. FY 2010 (state) Government Expenditures were \$25.4 million.

The MAC reported \$536,238 in contractual services, and \$1,915,721 in subsidies, loans and grants. MGC budgeted \$1,911,646 for contractual services plus \$100,075 in subsidies, loans and grants. Our Pearl River Basin Development District had \$176,826 for contractual; \$437,063 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget reflected \$2,479,403 for contractual, plus \$814,929 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences had \$1,133,448 for contractual services and \$390,694 for subsidies, loans and grants. Mississippi's Department of Marine Resources spent \$3,557,108—contractual services; \$6,742,238 for Federal Subsidies, Loans and Grants; and \$390,294 between Seafood Marketing and Saltwater Fishing programs. During the 2009 Legislative Session the Mississippi Legislature appropriated \$6,462,000 for the purpose of providing funds for Tourism and Welcome Centers program costs, for the fiscal year beginning July 1, 2009 and ending June 30, 2010. The Mississippi Department of Transportation (MDOT) spent \$5,065,713 to maintain Welcome Centers and Rest Areas, including contract and routine expenses.

Visitor Profile Study, FY 2010

Some 19.5 million estimated total visitors in FY 2010—all domestic leisure plus all business plus other personal plus all group travel plus international visitors—overnighted in, or did a day trip to Mississippi. Sources were the TNS FY 2010 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, reported 84 % as leisure travelers, or tourists; 8 % business; and 7 % personal business/other in FY 2010. Seventy-eight (78) % of all visitors were from out-of-state. About 69 % of the visitors overnighted; with leisure trips broken down by 72 % - overnight and 28 % - day. Some 75 % (3/4) of all FY 2010 overnight leisure visitors came from seven states—Mississippi (22 %), Louisiana (14 %), Alabama (11 %), Florida (8 %), Texas (7 %), Georgia (7 %) and Tennessee (6 %). Top five origin Designated Market Areas (DMAs) were New Orleans, Memphis, Mobile/Pensacola, Atlanta and Jackson (Mississippi).

Average annual household income for all Mississippi visitors was \$63,100. Their average age was 48. Average travel party size was 2.8 persons, with 3.2 nights spent in Mississippi. About 46 % traveled in pairs. Another 23 % traveled with children. The average number of children—for those traveling with children—was 1.9. Only 8 % of all leisure visitors arrived by air. Vacation activity niche characteristics varied, with casino gamers the largest market.

Social Science Research Center (SSRC) Web-Based Survey, 2010 Snapshot

MDA/Tourism Division coordinated a web-based survey with Mississippi State's SSRC, with quarterly survey questions e-mailed from late January - early November 2010. The purpose of this initiative is to secure more in-depth information from a sample of MDA/Tourism Division e-mail newsletter subscribers. A total of 2,095 e-respondents completed quarterly surveys throughout 2010, for an 18.3 % response rate [2,095/11,427 valid addresses].

Oil Spill questions were added for April – June 2010. Of 510 total respondents [that quarter], 300, or 59 %, visited or vacationed in Mississippi. Of these 300 visitors, 135—or 45.0 %--visited the Mississippi Gulf Coast. Some 12.0 % (1/8) of these 135 visitors to the Mississippi Gulf Coast indicated their trip was affected by the Oil Spill. The statewide proportion of those affected by this Oil Spill—just based on 300 respondents, April – June 2010 survey, that visited Mississippi, was 9.0 % (1/11). When these 300 respondents were asked "In the future, will you consider visiting the Mississippi Gulf Coast?," 51.5 % said 'Definitely'; 27.2 % stated 'More than likely'; 17.3 %--'Not sure'; 4.0 %--indicated either 'Probably not' or 'Definitely not'.

TABLE 12

ROOM/RESTAURANT GROSS SPECIAL TAX REVENUES BY TOURISM OFFICE, FY 2010

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2010 Room Tax Revenue	Gross FY 2010 Restaurant Tax Revenue	Gross FY 2010 Total Tax Revenues
Aberdeen	1.0	1.0	\$5,964	\$68,395	\$74,359
Baldwyn	None	2.0	None	109,039	109,039
Batesville	3.0	3.0	180,934	797,079	978,013
Bay Springs	3.0	None	6,195	None	6,195
Canton	2.0	2.0	84,023	392,531	476,554
Cleveland	2.0	2.0	112,363	557,225	669,588
Clinton	2.0	None	114,350	None	114,350
Coahoma County	2.0	1.0	72,169	281,133	353,302
Columbus-Lowndes	2.0	2.0	219,362	1,309,497	1,528,859
Corinth	2.0	2.0	57,453	909,317	966,770
DeSoto County	2.0	2.0	800,000	4,782,658	5,582,658
Florence	None	2.0	None	153,594	153,594
Flowood	None	2.0	None	1,632,081	1,632,081
Greenwood	1.0	1.0	89,738	329,272	419,010
Grenada	2.0	1.0	88,931	299,021	387,952
Hancock County	2.0	None	97,170	None	97,170
Harrison County	5.0	None	5,807,698	None	5,807,698
Hattiesburg	2.0	2.0	482,257	4,118,005	4,600,262
Hernando	1.0	None	3,858	None	3,858
Holly Springs	2.0	2.0	23,202	217,363	240,565
Horn Lake	1.5	None	106,346	None	106,346
Indianola	2.0	2.0	31,765	296,331	328,096
Jackson (city)*	4.0	2.0	2,712,464	4,732,775	7,445,239
Kosciusko	2.0	None	27,436	None	27,436
Lauderdale County	2.5	None	580,093	None	580,093
Laurel	2.0	2.0	150,000	1,116,757	1,266,757
Magee	1.0	1.0	22,573	195,560	218,133
McComb^	3.0	None	88,786	None	88,786
Montgomery County	2.0	None	19,223	None	19,223
Moss Point	3.0	None	369,140	None	369,140
Natchez#	3.0 plus \$2	1.5	644,052	626,090	1,270,142
New Albany	2.0	2.0	46,742	501,536	548,278
Newton	\$1/room night	None	10,352	None	10,352
Ocean Springs	2.0	2.0	22,799	937,007	959,806
Oxford	2.0	2.0	183,228	1,741,913	1,925,141
Pascagoula	3.0	None	85,959	None	85,959
Pearl	None	2.0	None	547,201	547,201

Table 12 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2010 Room Tax Revenue	Gross FY 2010 Restaurant Tax Revenue	Gross FY 2010 Total Tax Revenues
Philadelphia	3.0	None	\$78,536	None	\$78,536
Picayune	2.0	1.0	38,157	349,548	387,705
Pontotoc	2.0	2.0	7,885	334,110	341,995
Rankin County	2.0	None	622,483	None	622,483
Richland	None	2.0	None	313,670	313,670
Ridgeland	1.0	1.0	249,326	1,021,788	1,271,114
Ripley	2.0	2.0	8,583	223,949	232,532
Sardis&	3.0	3.0	12,254	57,109	69,363
Southaven	1.0	None	190,055	None	190,055
Starkville	2.0	2.0	149,940	1,387,459	1,537,399
Stone County	2.0	2.0	19,540	309,350	328,890
Tishomingo County	2.0	None	16,213	None	16,213
Tunica County	3.0	3.0	663,881	1,583,099	2,246,980
Tupelo	2.0	2.0	320,765	2,937,574	3,258,339
Vicksburg	3.0	1.0	648,818	723,131	1,371,949
Washington County	1.0	1.0	131,661	477,349	609,010
West Point	1.0	1.0	29,112	193,271	222,383
Yazoo County	2.0	2.0	41,077	296,186	337,263
Total			\$16,574,911	\$36,858,973	\$53,433,884

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.

^ McComb discontinued collecting its 3.0 % lodging tax in FY 2010.

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

& Sardis began collecting these taxes in the Fall of 2009.

SOURCE: Department of Revenue, 2010.

Tourism Capital Investment (TCI) FY 2010 Surveys

MDA/Tourism Division Research Program updated the FY 2010 TCI data, with input from MDA/Regional Services [under the Existing Industries and Business Division]; 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 2009 and 2010 TCI expenditures. TCI valuation is based on commercial permits issued and the Tourism factor for new construction and expansion and/or renovation of Tourism-related businesses/projects. Dollar amounts don't reflect announcements or dollars spent over a multi-year period. They do 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. Some entities don't furnish TCI data. TCI is a net Tourism figure, or estimated cost portion.

Total estimated statewide TCI in FY 2009 was \$278.7 million, based on data secured, and \$205.6 million in FY 2010, or \$73 million less—a 26.2 % decrease. Some \$108.94 million, or 53.0 % of the FY 2010 TCI, was from private sources. The other \$96.65 million, or 47.0 %, were public monies, from federal, state, county and city sources. State-licensed casinos, plus their amenities, accounted for \$54.6 million in FY 2010 TCI, or 26.6 % of the total TCI.

The Mississippi Gulf Coast accounted for \$89.1 million in FY 2010 TCI, or 43.3 % of the state's total. Museums, retail establishments, infrastructure, casinos and many others comprised this TCI. Harrison County FY 2010 TCI of \$77.5 million was 37.7 % of the state's total TCI. Jackson County TCI included restaurants, museums, retail, convenience stores, etc. Hancock County had INFINITY, a pier, restaurants, some casino work and infrastructure projects. Tunica County's \$12.6 million in FY 2010 TCI comprised a new shopping center, casino-related and county airport improvements. Greenville/Washington County reflected \$3.6 million for FY 2010 projects such as restaurants, retail, casinos and infrastructure.

Our Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) FY 2010 TCI was \$26 million, or 12.7 % of \$205.6 million. Hotel/motel projects, museums, retail, arts & crafts entities, infrastructure projects (airport/others) and restaurants were in the mix.

The Hattiesburg area (Forrest/Lamar counties) reflected \$3.8 million in FY 2010 TCI, such as restaurant and retail projects, infrastructure, state park renovations, downtown projects and other initiatives. Tupelo's \$8.7 million for FY 2010 TCI covered retail, their regional airport, restaurants, monuments, convenience stores, a state park, sports facilities, restaurants, theatres and infrastructure. DeSoto County's \$2.4 million in FY 2010 TCI comprised retail, restaurants, a rest area, and infrastructure. Oxford plus Lafayette County non-city TCI was \$2.9 million—athletic facilities, retail, infrastructure. Corinth's \$1.25 million in TCI comprised restaurants, a hotel and Welcome Center renovation, and infrastructure. Tishomingo County's nearly \$800,000 in FY 2010 TCI included state park infrastructure, road construction and battlefield-related work.

Meridian/Lauderdale County's \$3.5 million in FY 2010 TCI covered motel renovations, historic sites, airport infrastructure, restaurants and retail. Neshoba County's \$1.1 million in FY 2010 TCI featured a Park, some retail, concessions, and major infrastructure work.

Natchez had \$6.2 million in FY 2010 TCI—infrastructure (Natchez Trace Parkway), restaurant and hotel renovations. Vicksburg's \$8.2 million in FY 2010 TCI comprised museums, a Sports Complex, Municipal Airport, etc. new parking garage, renovations to casinos/amenities, restaurant renovations, retail and infrastructure. Pearl River County's \$1.5 million in FY 2010 TCI included major renovations to its Welcome Center, a pavilion, plus infrastructure. Pike County's \$440,000 in FY 2010 TCI featured Welcome Center repairs and restaurant renovations.

FY 2011 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 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, so this reporting and distribution system precludes gathering unleaded, mid-grade and premium gasoline sales at the local level. The Department of Revenue 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. The IMPLAN 2009 Version 3 data intersect, but are not identical with, FY 2010 tourist/visitor 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 tourist/visitor sales, e.g., a county whose restaurant sales to tourists/visitors comprise 24 % of the total, or another one where this proportion is 10 %.

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.
- Concentration Rank:** Travel and Tourism as a percentage of total 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) 2010:** July 2009 - June 2010.
- 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.
- Gross State Product (GSP):** A measurement of a state's output—the sum of value added from all industries in the state. GSP, the state counterpart of gross domestic product (GDP) for the U.S., measures the value added to U.S. production by the labor/capital in each state.
- 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).
- Indirect Contribution:** Secondary contribution of purchase of production by the firm (business level), holding everything else constant.
- Induced Contribution:** Secondary contribution from the purchases made by the workers (consumer level), holding everything else constant.
- Labor Income/GSP:** One estimate, using IMPLAN, which can be used for Travel and Tourism.
- 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 Tourist/Visitor Sales and Tax Revenues:** The estimated portion of Travel and Tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales (Tourist/Visitor expenditures) and General Fund revenues.
- North American Industry Classification System (NAICS) Codes:** Two-to-six digit codes in the 1997 NAICS/Standard Industrial Classification (SIC) Code United States Manual. SIC refers to what was produced by the Industry; NAICS focuses on what the employee does.
- Qualified Households:** Qualified households will have traveled 50+ miles from home, or overnight for business or pleasure, but exclude commuters. All FY 2010 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/Super Sector:** The broad two-digit NAICS category, e.g., 31 - 33 Manufacturing (super sector); 44 - 45 Retail Trade (sector under Trade, Transportation & Utilities).
- 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 Tourism Commodity Demand within a state.
- Sub-Sectors/Industry Groups:** More specific three-to-six digit 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 its intermediate inputs. Simply, the contribution of an industry or sector to GDP or GSP.
- Total Value Added to Travel-related Expenditures:** A ratio which measures how much of each Tourist/Traveler Dollar spent, including Tourism Capital Investment, remains in the state.
- 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.
- Tourist/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.

Travel and Tourism: The science, art, and business of attracting and transporting 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 Direct Value Added: The direct Travel-related expenditures, after doing the IMPLAN analysis/GSP. This is “imperfect,” and not as precise as Labor Income/GSP.

Travel and Tourism Economy: The grouping, matching and use of NAICS and IMPLAN codes to estimate Travel and Tourism’s statewide contribution in terms of Total Value Added, total employment and labor income associated with Travel and Tourism, TCI, Travel and Tourism’s contribution to the General Fund, Tourist/Visitor expenditures, Government spending, Travel and Tourism Exports/Imports, etc. Overlapping elements exist between the Travel and Tourism Economy and Industry.

Travel and Tourism Exports: Expenditures by out-of-state Tourists/Visitors in Mississippi.

Travel and Tourism GSP: The Total Value Added of Travel and Tourism’s composite nature expressed as its overall contribution to GSP, or its Total Value Added/GSP. Travel and Tourism’s ranking, within the Mississippi’s economy, should be limited to GSP and Employment.

Travel and Tourism Imports: 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 in terms of direct employment, annual payroll for direct jobs, Tourist/Visitor expenditures, state and city/county tax revenues, contribution to the General Fund, etc.

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Coahoma County. Daniel Vassel, County Administrator; Donna McPherson, CPA.

Greenville, City of. Steve Osso, Chief Financial Officer; Amelia D. Wicks, City Clerk.

Hancock County. Sissy Gonzales, Comptroller; Reba McCaleb, Accounts Receivable Clerk.

International, Regional and Tunica County Airports:

Golden Triangle Regional Airport. Mike Hainsey, Assistant Director.

Gulfport-Biloxi International Airport. Stephen Oberlies, Director of Finance.

Hattiesburg-Laurel Regional Airport. Thomas E. Heanue, Executive Director.

Jackson-Evers International Airport. Jack Weldy, Properties and Leases Manager.

Meridian Airport Authority. Debbie Moulds, Executive Assistant.

Tunica County Airport. Cliff Nash, Executive Director.

Tupelo Municipal Airport. Margot Ganaway, Executive Assistant.

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Mississippi Arts Commission (MAC). Lee Ann Powell, Deputy Director.

Mississippi Department of Archives and History (MDAH). Lucy Allen, Director, Museum Division.

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Vicksburg, City of. Paul C. Rogers, Strategic Planner.

Washington County. Elizabeth Smith, County Administrator.

Tourism Capital Investments:

Amory, City of. Russell G. Butler, City Planner/Zoning Administrator.
Baldwyn, City of. James Harris, Codes.
Biloxi, City of. Carlyle Lena, Permit Clerk II.
Brandon, City of. Amanda Tolstad, Community Development.
Brookhaven-Lincoln County Chamber. Cliff Brumfield, Executive Director.
Cleveland-Bolivar County Tourism. Cheryl Line, Tourism Director.
Community Development Foundation (Tupelo). Jamie Kennedy, Hunter Aycock.
Corinth Area CVB. Kristy White, Executive Director.
D'Iberville, City of. Leslie Robertson, Community Development Project Coordinator.
Flowood, City of. Dianne Woodard, Building & Permit Department.
Gautier, City of. Anthony Matheny, Director; Babs Logan, Planning Department.
Greenwood, City of. Penny Hodge, Code Enforcement Office.
Grenada, City of. Linda Smith, Planning & Zoning Department.
Gulfport, City of. Gary Anderson, Deputy Building Official.
Harrison County Code Administration. Theresa Hydrick and Kelly Henderson.
Hattiesburg CVB/Visitors Center. Nicole R. Ruhnke, Visitor Services.
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Morton, City of. Honorable Greg Butler, Mayor.
Moss Point, City of. Cathy Wright and Dorothy Dubose.
Natchez Inc. Winnie Kaiser, Community Development Director.
Ocean Springs, City of. Theresa Dobbs.
Oxford CVB. Mary Allyn Roulhac, Tourism Coordinator.
Panola Partnership. Meredith C. Fleming, Economic Development Assistant.
Pass Christian, City of. Gene Peralta, Code Enforcement Office.
Pearl, City of. Lorraine Knight, Building Permit Specialist.
Pelahatchie, City of. Ruby Burns.
Philadelphia Community Development Partnership. Kaye Rowell, Tourism Director.
Pike County. Tammy Menard.
Poplarville, City of. Linda DuPont, Building Permits Official.
Rankin County. Judy Bolls, Building Department.
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Richland, City of. Ann Grantham, Public Works/Community Development.
Ridgeland, City of. Karen Knight, Community Development.
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Natchez National Historical Park. Melissa Tynes, Division Chief.

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Shiloh National Military Park/Corinth site. Stacy D. Allen, Chief Ranger.

Vicksburg National Military Park. Shirley Smith, Human Resources Assistant.

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APPENDICES

Appendix A

ESTIMATED TRAVEL AND TOURISM EMPLOYMENT
FY 2009 AND FY 2010

CATEGORY	FY 2009	FY 2010	CHANGE
Food Services & Drinking Places (1)	23,800	24,050	1.1%
Lodging, excluding state-licensed casino hotels (2)	10,700	10,900	1.9%
Gaming (3)	27,160	26,590	-2.1%
Retail Trade (4)	8,025	8,200	2.2%
Support Activities, Air Transportation (5)	1,715	1,943	13.3%
Air Passenger, Scheduled & Chartered (5)	297	306	3.0%
Scenic & Sightseeing Transportation	42	37	-11.9%
Charter Bus Industry	104	105	1.0%
Taxi Service	48	54	12.5%
Amtrak, Limo Service, Other Bus Transportation	NA	100	NA
Sub-Total, Transportation	2,206	2,545	15.4%
Travel Arrangement/Reservations	348	353	1.4%
Passenger Car Rental	163	194	19.0%
Parking Lots & Garages	14	14	None
Advertising & Related Services	185	182	-1.6%
Laundry Services	139	137	-1.4%
Sub-Total, Other Services	849	880	3.7%
Motion Picture Theaters	174	163	-6.3%
Motion Picture & Video Production	121	75	-38.0%
Museums, Historical Sights & Similar	213	205	-3.8%
Performing Arts, Spectator Sports & Related	258	345	33.7%
Amusement Parks, Bowling, Golf Courses, Marinas	1,279	1,259	-1.6%
Federal, State, Local Tourism Agencies/Offices (6)	835	872	4.4%
Selected Outdoor Recreation (7)	NA	481	NA
Construction (8)	2,620	1,920	-26.7%
Total	78,240	78,485	0.3%

This Appendix Includes:

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).
3. Based on LMI 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; Prerecorded Tape, Compact Disc and Record Stores.
5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.
6. 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. There was better participation in FY 2010, compared to FY 2009, in the participation rate of local Tourism Offices/Bureaus.
7. 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 2010, but not FY 2009 data.
8. Only reflects estimated Travel and Tourism-related construction activity.

Appendix A (continued)

*SOURCES: Amtrak Government Affairs, 2010.
Convention & Visitor Bureaus (CVB's) and other Tourism Offices, 2010.
Department of Revenue, 2010.
Mississippi Arts Commission, 2010.
Mississippi Department of Archives and History, 2010.
Mississippi Department of Employment Security, LMI Department, 2010.
Mississippi Department of Marine Resources, 2010.
Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2010.
Mississippi Development Authority/Tourism Division, 2010.
Mississippi Gaming Commission, 2010.
Mississippi Museum of Natural Science, 2010 (under DWF&P).
Outdoor Recreation Surveys, 2010.
Pearl River Basin Development District, 2010.
Pearl River Water Supply District, 2010.
U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2010.
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, 2010.*

Appendix B

ESTIMATED TRAVEL AND TOURISM PAYROLL
FY 2009 AND FY 2010

CATEGORY	FY 2009 PAYROLL	FY 2010 PAYROLL
Food Services & Drinking Places	\$279,972,156	\$295,357,685
Lodging (1)	131,202,769	156,300,700
Gaming (2)	791,435,257	754,165,296
Retail Trade (3)	141,374,385	150,282,015
Support Activities, Air Transportation	73,921,357	87,586,083
Air Passenger, Scheduled & Chartered	9,803,007	10,232,720
Scenic & Sightseeing Transportation	799,903	898,178
Charter Bus Industry	2,201,851	2,204,104
Taxi Service	765,325	920,424
Amtrak, Limo Service, Other Bus Transportation	NA	5,410,780
Sub-Total, Transportation	87,491,443	107,252,289
Travel Arrangement/Reservations	8,724,601	8,690,573
Passenger Car Rental	3,603,047	4,516,708
Parking Lots & Garages	227,230	218,199
Advertising & Related Services	7,411,593	7,183,102
Laundry Services	2,549,272	2,577,990
Sub-Total, Other Services	22,515,743	23,186,572
Motion Picture Theaters	1,538,374	1,561,351
Motion Picture & Video Production	1,794,863	2,189,221
Museums, Historical Sights & Similar	6,092,642	6,050,603
Performing Arts, Spectator Sports & Related	5,574,651	7,305,320
Amusement Parks, Bowling, Golf Courses, Marinas	21,417,760	21,200,452
Federal, State, Local Tourism Agencies/Offices (4)	34,689,414	50,481,437
Selected Outdoor Recreation (5)	NA	7,831,000
Construction (6)	100,004,989	73,623,792
Total	\$1,625,104,446	\$1,656,787,733

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; Antique & 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; Pre-recorded Tape, Compact Disc and Record 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. 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 2010, but not FY 2009 data.
6. Only reflects estimated Travel and Tourism-related construction activity.

SOURCES: Amtrak Government Affairs, 2010.

Convention & Visitor Bureaus (CVB's) and other Tourism Offices, 2010.
Department of Revenue, 2010.
Mississippi Arts Commission, 2010.
Mississippi Department of Archives and History, 2010.
Mississippi Department of Employment Security, LMI Department, 2010.
Mississippi Department of Marine Resources, 2010.
Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2010.
Mississippi Development Authority/Tourism Division, 2010.
Mississippi Gaming Commission, 2010.
Mississippi Museum of Natural Science, 2010 (under DWF&P).
Outdoor Recreation Surveys, 2010.
Pearl River Basin Development District, 2010.
Pearl River Water Supply District, 2010.
U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2010.
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, 2010.

Appendix C

ESTIMATED TRAVEL AND TOURISM EXPENDITURES
BY VISITORS, FY 2009 AND FY 2010

CATEGORY	FY2009	FY2010	CHANGE
Restaurants	\$835,083,147	\$878,782,115	5.2%
Quick-Stop, Specialty Food & Grocery Stores	505,571,635	535,217,253	5.9%
Concessions Quick Food	64,302,114	67,638,075	5.2%
Bar & Beer Parlors	48,307,652	49,459,289	2.4%
Lodging	585,207,947	603,902,063	3.2%
Gaming (1)	1,813,026,645	1,683,524,623	-7.1%
Department & General Merchandise (NEC)	681,115,674	628,725,647	-7.7%
Other Retail, including Gasoline/Service Stations (2)	884,806,133	848,191,619	-4.1%
Fixed Facilities, Air Transportation (3)	29,097,266	31,166,931	7.1%
Rental & Leasing, Transportation	18,985,223	13,431,907	-29.3%
Auto Repair Shops & Accessories	32,591,899	67,187,075	106.1%
Rail and Water Passenger Transportation (4)	6,558,509	8,133,614	24.0%
Entertainment/Outdoor Recreation (5)	65,714,241	78,328,250	19.2%
Advertising Specialties	1,698,880	1,391,850	-18.1%
Printing & Publishing	2,129,198	2,322,467	9.1%
Laundries, Dry Cleaning	6,304,379	5,926,647	-6.0%
Total	\$5,580,500,542	\$5,503,329,425	-1.4%

Appendix C (continued)

This Appendix Includes:

1. Net Tourist/Visitor Gross Gaming Revenues for 30 state-licensed casinos in FY 2009; and 30 in FY 2010.
2. 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. First Sales of Petroleum Products into Mississippi for Consumption and AAA self Service Unleaded Gas Price Averages.
3. Air Transportation, Air Terminal, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY 2009 and FY 2010, based on scheduled/charter passenger service and Passenger Facility Charges.
4. Amtrak ticket sales included for both FY 2009 and FY 2010.
5. 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.

SOURCES: American Automobile Association Web Site, 2010.

Amtrak Government Affairs, 2010.

Department of Revenue, 2010.

Mississippi Department of Marine Resources, 2010.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2010.

Mississippi Development Authority/Energy Division, 2010.

Mississippi Development Authority/Tourism Division, 2010.

Mississippi Gaming Commission, 2010.

U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2010.

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, 2010.

Appendix D

ESTIMATED TRAVEL AND TOURISM GENERAL FUND
REVENUES, FY 2009 AND FY 2010

CATEGORY	FY 2009	FY 2010	CHANGE
Restaurants	\$35,058,407	\$36,900,602	5.3%
Quick-Stop, Specialty Food & Grocery Stores	21,233,453	22,479,029	5.9%
Concessions Quick Food	2,701,144	2,840,742	5.2%
Bar & Beer Parlors	2,028,739	2,077,224	2.4%
Lodging	24,578,190	25,363,884	3.2%
Gaming (1)	120,926,550	108,800,000	-10.0%
Department & General Merchandise	28,600,816	26,406,469	-7.7%
Other Retail (2)	20,365,904	19,875,343	-2.4%
Rental & Leasing, Other Transportation (3)	569,137	564,131	-0.9%
Auto Repair Shops & Accessories	1,354,275	2,408,281	77.8%
Entertainment/Outdoor Recreation (4)	2,696,079	3,021,650	12.1%
Advertising Specialties	71,150	58,445	-17.9%
Printing & Publishing	88,353	97,537	10.4%
Laundries, Dry Cleaning	264,491	248,903	-5.9%
Construction Activity Tax (5)	8,857,000	6,517,045	-26.4%
Personal Income/Sales Tax (6)	87,367,055	88,173,618	0.9%
Use Tax (7)	NA	7,812,488	NA
Total	\$356,760,743	\$353,645,391	-0.9%

Appendix D (continued)

This Appendix Includes:

1. Approximately \$108.8 million, or 70.1 % of the \$155.2 million in General Fund Gaming Fees and Tax Transfers, were the "Net" Travel and Tourism Portion. The other \$46.4 million, or 29.9%, were not attributed to Travel & Tourism. This does not include \$36 million diverted to MDOT's Bond Sinking Fund.
2. 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. This Appendix does not include Gasoline/diesel sales @ the pump, since those monies are diverted.
3. Also includes: Transportation Services, Fixed Facilities-Air Transportation, Water Passenger Transportation.
4. 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.
5. The estimated Travel and Tourism-related portion of the General Fund based on TCI.
6. 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.
7. Estimated for the first time in FY 2010 from 88.9 % of the Travel and Tourism-related equipment purchases for Mississippi's counties/cities within these counties.

SOURCES: Center for Policy Research and Planning, Mississippi IHL, 2010.

Department of Revenue, 2010.

Mississippi Department of Employment Security, LMI Department, 2010.

Mississippi Development Authority/Energy Division, 2010.

Mississippi Development Authority/Tourism Division, 2010.

Appendix E

ESTIMATED COUNTY TRAVEL AND TOURISM EXPENDITURES, EMPLOYMENT, STATE/LOCAL TAXES, TCI, FY 2009

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	\$86,341,138	2,005	15.1	\$7,807,165	\$10,166,671
Alcorn	40,209,672	700	5.2	3,191,495	1,207,248
Amite	1,818,775	20	1.0	149,983	23,523
Attala	16,523,267	280	5.4	1,261,788	39,277
Benton	769,959	10	0.8	71,555	7,412
Bolivar	26,432,116	480	3.9	2,110,631	248,079
Calhoun	2,793,850	30	1.0	218,092	24,865
Carroll	877,937	13	1.2	83,784	12,775
Chickasaw	4,797,191	70	1.3	358,394	26,004
Choctaw	1,019,447	14	0.8	89,706	10,527
Claiborne	2,719,130	40	1.3	225,235	207,686
Clarke	3,404,866	50	1.6	283,016	91,624
Clay	13,664,583	195	3.4	1,058,885	4,723,818
Coahoma	50,611,304	870	10.3	5,070,573	89,343
Copiah	7,428,427	105	1.3	547,552	79,358
Covington	5,766,101	80	1.6	423,580	120,557
DeSoto	214,086,678	3,000	6.2	17,530,979	4,425,343
Forrest ^	240,871,636	3,900	6.8	19,067,448	10,423,067
Franklin	841,597	12	0.7	79,475	28,481
George	7,653,328	100	2.1	557,040	209,344
Greene	1,274,193	13	0.7	110,365	16,266
Grenada	37,115,083	685	6.6	2,877,404	392,892
Hancock	159,314,707	1,850	13.1	17,169,789	8,411,435
Harrison	1,344,839,062	20,000	22.2	141,127,582	115,677,967
Hinds	321,213,887	6,260	4.5	26,785,410	10,590,927
Holmes	3,706,506	50	1.2	285,513	558,996
Humphreys	2,351,590	23	0.8	182,761	6,766
Issaquena	70,954	1	0.5	6,602	2,500
Itawamba	8,548,793	125	2.1	651,010	857,457
Jackson	130,057,694	1,750	3.3	11,937,538	13,458,303
Jasper	3,017,755	40	1.0	238,487	12,511
Jefferson	878,801	12	1.1	81,417	14,663
Jefferson Davis	2,502,203	30	1.4	195,103	140,419
Jones	48,933,552	685	2.3	3,805,138	6,858,979
Kemper	1,470,527	20	1.2	127,134	50,530
Lafayette	83,722,132	1,375	7.1	6,769,083	1,582,899
Lamar ^					^
Lauderdale	123,764,118	1,800	4.6	9,193,731	10,864,709

Appendix E (continued)

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
Lawrence	\$2,651,240	30	1.1	\$205,177	\$8,888
Leake	8,297,547	90	1.6	618,714	146,342
Lee	217,272,129	3,510	6.5	17,050,148	13,582,412
Leflore	40,808,080	680	4.4	3,130,242	3,496,936
Lincoln	20,121,070	270	2.2	1,450,385	2,996,287
Lowndes	89,952,996	1,320	5.0	7,136,916	1,060,040
Madison	160,201,941	1,965	4.0	12,066,708	7,116,628
Marion	9,552,058	120	1.5	692,880	29,522
Marshall	11,460,324	180	2.8	917,861	237,382
Monroe	15,685,511	225	2.2	1,184,150	30,592
Montgomery	6,420,248	65	2.4	514,422	16,628
Neshoba #	27,805,390	385	NA	2,116,747	55,253
Newton	5,144,151	70	1.1	392,890	138,911
Noxubee	3,791,736	40	1.5	324,398	33,665
Oktibbeha	59,846,879	950	4.5	4,766,426	244,140
Panola	24,987,159	330	2.9	2,063,292	64,269
Pearl River	18,967,150	245	3.1	1,441,488	2,803,634
Perry	1,968,912	23	1.0	159,797	17,088
Pike	30,375,224	455	2.8	2,354,044	670,482
Pontotoc	7,059,343	80	0.8	531,771	244,887
Prentiss	6,424,086	78	1.0	468,282	24,881
Quitman	1,117,354	12	0.8	98,884	5,874
Rankin	142,660,365	2,000	3.3	11,366,149	11,015,774
Scott	16,508,895	190	1.5	1,215,475	105,908
Sharkey	1,133,543	12	1.1	97,613	3,078
Simpson	13,736,191	165	2.0	1,060,931	587,720
Smith	2,067,952	18	0.6	162,418	7,495
Stone	6,421,182	85	2.0	521,123	3,010,305
Sunflower	12,433,582	175	1.9	1,005,793	62,536
Tallahatchie	1,821,935	25	0.9	150,802	27,952
Tate	8,996,044	125	2.2	681,236	43,172
Tippah	6,418,980	75	1.1	518,728	127,558
Tishomingo	11,546,901	180	3.0	872,595	1,912,332
Tunica	915,709,363	11,240	78.6	105,547,702	12,120,921
Union	11,624,498	180	1.9	955,556	2,413,786
Walthall	2,222,817	32	1.1	175,297	2,107
Warren	209,700,963	4,010	16.2	21,068,277	7,062,981
Washington	79,608,045	1,415	6.7	7,364,177	3,876,752
Wayne	7,342,811	85	1.5	527,000	119,768
Webster	2,069,837	22	1.0	163,625	16,495
Wilkinson	2,256,903	28	1.3	179,639	7,402

Appendix E (continued))

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
Winston	\$13,026,026	200	3.5	\$983,072	\$556,940
Yalobusha	2,497,628	32	1.1	212,675	761,560
Yazoo	9,171,819	130	2.2	790,516	199,723
Other!	330,201,175			32,284,137	
Total	\$5,580,500,542	78,240	7.0	\$529,320,601	\$278,730,227

!Other includes estimated Gasoline Sales and Taxes for 79 Mississippi Counties, Diesel Fuel Sales, the Non-Resident License Sales reported by the Departments of Wildlife, Fisheries & Parks and Marine Resources (included under Fees). Appendix F includes estimated Travel and Tourism expenditures at state-licensed casinos for these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Estimated Neshoba County revenues do not include Pearl River Resort revenues.

^^Panola County TCI figures do not reflect estimated business valuation.

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.

*The Travel and Tourism Employment Percentage equals the estimated direct Tourism jobs/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 Tourist/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; User taxes; available TCI local permit fees. Data attributable to Travel and Tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices
 Mississippi Department of Employment Security, LMI Department
 Mississippi Department of Finance and Administration, Bureau of Buildings of Business and Real Property Management
 Mississippi Department of Revenue
 Mississippi Department of Transportation
 Mississippi Department of Wildlife, Fisheries and Parks
 Mississippi Gaming Commission
 McGraw-Hill Construction/Dodge, 2009.

Appendix F

ESTIMATED COUNTY TRAVEL AND TOURISM EXPENDITURES, EMPLOYMENT, STATE/LOCAL TAXES, TCI, FY 2010

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	\$83,043,949	2,000	16.0	\$7,551,528	\$6,159,706
Alcorn	41,064,718	700	5.5	3,348,097	1,254,257
Amite	1,892,398	25	1.2	155,723	39,105
Attala	16,037,980	270	5.6	1,227,025	964,065
Benton	747,824	10	0.9	72,177	0
Bolivar	30,896,032	525	4.4	2,534,619	257,384
Calhoun	3,011,877	40	1.4	233,108	91,588
Carroll	1,020,132	15	1.5	93,895	245,283
Chickasaw	4,947,016	70	1.3	368,386	283,104
Choctaw	1,057,378	14	0.8	101,870	14,119
Claiborne	2,263,376	40	1.2	211,405	106,686
Clarke	3,671,079	52	1.6	310,873	344,092
Clay	14,609,705	220	3.9	1,170,161	469,218
Coahoma	57,623,478	900	11.0	5,735,501	886,549
Copiah	7,450,485	105	1.4	540,468	795,229
Covington	6,163,569	85	1.7	453,192	268,265
DeSoto	216,520,628	3,050	6.5	17,806,895	2,397,820
Forrest ^	225,462,170	3,840	6.8	18,143,801	3,821,326
Franklin	1,071,515	17	1.1	98,097	72,886
George	7,593,881	110	2.2	553,633	226,204
Greene	1,306,532	16	0.8	114,394	541,536
Grenada	37,008,205	685	7.4	2,896,788	1,025,297
Hancock	139,787,880	1,785	12.6	15,118,260	7,077,845
Harrison	1,338,597,423	20,000	22.6	140,781,577	77,499,301
Hinds	311,045,492	6,240	4.5	26,761,820	14,012,361
Holmes	3,836,277	50	1.3	296,162	740,205
Humphreys	2,262,128	30	1.0	179,532	0
Issaquena	194,483	3	0.9	14,553	0
Itawamba	9,094,015	130	2.4	714,385	5,453,423
Jackson	138,579,820	1,780	3.4	12,604,226	4,498,742
Jasper	3,218,856	45	0.9	261,436	107,213
Jefferson	961,495	13	1.2	87,791	62,061
Jefferson Davis	2,401,465	30	1.7	189,126	223,920
Jones	48,685,653	695	2.4	3,963,091	1,612,379
Kemper	1,515,407	20	1.2	131,781	1,263,662
Lafayette	85,726,343	1,395	7.4	7,005,738	2,871,760
Lamar ^					^
Lauderdale	128,670,190	1,850	5.0	9,750,564	3,476,351

Appendix F(continued)

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
Lawrence	\$2,640,998	35	1.3	\$228,344	\$35,392
Leake	9,369,587	125	2.3	692,805	1,193,535
Lee	212,063,045	3,500	6.7	17,048,494	8,683,220
Leflore	46,873,079	720	4.8	3,644,186	1,143,418
Lincoln	20,068,732	265	2.3	1,474,901	270,317
Lowndes	87,637,001	1,300	5.1	7,367,526	6,571,941
Madison	166,698,143	2,195	5.1	12,816,951	6,947,443
Marion	10,003,731	135	1.6	724,395	131,149
Marshall	11,594,829	180	2.8	933,511	315,400
Monroe	15,238,246	215	2.2	1,247,762	411,538
Montgomery	6,628,171	90	3.3	539,896	39,189
Neshoba #	27,516,008	380	NA	2,115,895	1,143,159
Newton	5,258,105	73	1.3	403,201	396,598
Noxubee	4,708,616	65	2.8	387,030	738,501
Oktibbeha	65,229,868	1,000	4.8	5,305,071	534,108
Panola ^^	30,178,327	395	3.7	2,563,590	1,237,603
Pearl River	18,547,488	240	2.2	1,437,264	1,516,174
Perry	2,250,987	30	1.4	195,765	293,369
Pike	29,650,678	450	2.8	2,177,493	441,142
Pontotoc	7,693,338	100	1.0	595,787	511,709
Prentiss	6,737,048	85	1.1	506,326	221,625
Quitman	1,274,684	17	1.2	109,792	0
Rankin	163,653,958	2,150	3.6	14,000,821	4,115,246
Scott	16,875,600	225	1.7	1,462,573	1,159,533
Sharkey	1,229,768	16	1.6	105,474	2,124
Simpson	13,951,660	175	2.2	1,079,585	208,825
Smith	1,937,319	22	0.8	167,597	20,992
Stone	6,595,673	90	2.2	538,757	211,324
Sunflower	12,575,235	175	2.0	1,029,339	200,226
Tallahatchie	3,489,583	47	1.7	263,977	0
Tate	8,924,000	122	2.2	708,850	146,298
Tippah	6,309,445	80	1.3	507,642	91,688
Tishomingo	10,531,629	175	3.0	829,583	793,355
Tunica	824,750,443	10,540	82.4	96,403,454	12,562,357
Union	11,927,753	185	2.1	990,658	472,212
Walthall	2,229,201	32	1.0	177,427	238,273
Warren	196,661,491	3,970	17.0	20,218,484	8,238,870
Washington	84,217,845	1,445	7.2	7,988,516	3,583,442
Wayne	7,377,680	90	1.7	548,298	428,838
Webster	2,227,318	35	1.6	177,319	0
Wilkinson	2,503,826	38	1.7	197,698	158,022

Appendix F (continued)

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
Winston	\$14,100,623	220	4.4	\$1,062,261	\$583,719
Yalobusha	3,509,302	48	1.7	293,788	227,527
Yazoo	10,190,805	155	2.7	852,089	214,824
Other!	330,657,705			33,177,391	
Total	\$5,503,329,425	78,485	7.2	\$526,879,244	\$205,597,167

!Other includes estimated Gasoline Sales and Taxes for 79 Mississippi Counties, Diesel Fuel Sales, the Non-Resident License Sales reported by the Departments of Wildlife, Fisheries & Parks and Marine Resources (included under Fees). Appendix F includes the estimated Travel and Tourism expenditures at state-licensed casinos for these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Estimated Neshoba County revenues do not include Pearl River Resort revenues.

^^Panola County TCI figures do not reflect estimated business valuation.

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.

*The Travel and Tourism Employment Percentage equals the estimated direct Tourism jobs/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 Tourist/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; User taxes; available TCI local permit fees. Data attributable to Travel and Tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices
 Mississippi Department of Employment Security, LMI Department
 Mississippi Department of Finance and Administration, Bureau of Buildings of Business and Real Property Management
 Mississippi Department of Revenue
 Mississippi Department of Transportation
 Mississippi Department of Wildlife, Fisheries and Parks
 Mississippi Gaming Commission
 McGraw-Hill Construction/Dodge, 2010.

Appendix G

ESTIMATED HOTEL/MOTEL ROOM COUNT, FY 2009/FY 2010

County	Hotel/Motel Rooms (6-30-09)	Hotel/Motel Rooms (6-30-10)	Percentage Change
Adams	1,093	1,254	14.7%
Alcorn	354	381	7.6%
Amite	14	14	None
Attala	130	130	None
Benton	0	0	NA
Bolivar	460	341	-25.9%
Calhoun	26	26	None
Carroll	12	12	None
Chickasaw	62	62	None
Choctaw	14	14	None
Claiborne	44	44	None
Clarke	20	20	None
Clay	157	238	51.6%
Coahoma	879	879	None
Copiah	137	137	None
Covington	93	93	None
DeSoto	2,499	2,683	7.4%
Forrest*	2,762	2,551	-7.6%
Franklin	0	0	NA
George	151	151	None
Greene	0	0	NA
Grenada	753	678	-10.0%
Hancock	831	831	None
Harrison	9,297	9,461	1.8%
Hinds	5,629	5,735	1.9%
Holmes	54	54	None
Humphreys	61	40	-34.4%
Issaquena	0	0	NA
Itawamba	61	61	None
Jackson	2,718	2,448	-9.9%
Jasper	26	26	None
Jefferson	0	0	NA
Jefferson Davis	68	40	-41.2%
Jones	656	736	12.2%
Kemper	32	32	None
Lafayette	699	714	2.1%
Lamar*			*
Lauderdale	1,911	2,028	6.1%
Lawrence	30	30	None

Appendix G (continued)

County	Hotel/Motel Rooms (6-30-09)	Hotel/Motel Rooms (6-30-10)	Percentage Change
Leake	56	56	None
Lee	1,779	1,734	-2.5%
Leflore	754	819	8.6%
Lincoln	399	407	2.0%
Lowndes	856	899	5.0%
Madison	2,052	2,016	-1.8%
Marion	190	120	-36.8%
Marshall	225	225	None
Monroe	143	229	60.1%
Montgomery	139	179	28.8%
Neshoba	1,565	1,562	-0.2%
Newton	103	103	None
Noxubee	59	59	None
Oktibbeha	707	806	14.0%
Panola	502	568	13.1%
Pearl River	299	364	21.7%
Perry	19	19	None
Pike	777	777	None
Pontotoc	56	56	None
Prentiss	70	80	14.3%
Quitman	0	0	NA
Rankin	1,938	2,297	18.5%
Scott	233	233	None
Sharkey	19	19	None
Simpson	194	194	None
Smith	33	33	None
Stone	93	175	88.2%
Sunflower	240	235	-2.1%
Tallahatchie	0	0	NA
Tate	131	131	None
Tippah	49	70	42.9%
Tishomingo	130	130	None
Tunica	6,300	6,074	-3.6%
Union	225	317	40.9%
Walthall	30	30	None
Warren	2,309	2,366	2.5%
Washington	1,221	1,256	2.9%
Wayne	150	150	None
Webster	50	48	-4.0%
Wilkinson	12	18	50.0%
Winston	213	213	None

Appendix G (continued)

County	Hotel/Motel Rooms (6-30-09)	Hotel/Motel Rooms (6-30-10)	Percentage Change
Yalobusha	20	20	None
Yazoo	139	212	52.5%
Total	56,212	57,243	1.8%

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2010 and January 2011, Cabin Rooms, or Condo/Timeshare rooms. The county-by-county room counts are based on figures provided by a variety of sources. In some instances, a different official furnished the data between one year and the next. Smith Travel Research inventory data were used for some FY 2009 and FY 2010 updates, reflecting all hotel/motel properties in Smith Travel Research's Mississippi database. Some counties reflected a slight decline in their hotel/motel room inventory due to eliminating a few rooms to "make room" for other amenities such as business and fitness centers.

** 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, Hendersonville, Tennessee, 2010.

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, 2010.

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