

**Fiscal Year 2008 Economic Contribution
Report of
Tourism In Mississippi
February 2009**

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INTRODUCTION

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

Tourism's visibility throughout Mississippi is at an all-time high. Fifty-three local entities with a Room and/or Restaurant Tax were in place as of February 2009. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism is a \$739 billion national industry in terms of direct domestic and international expenditures with 7.7 million direct jobs, \$186 billion in payroll income, and \$116 billion in combined federal, state and local tax revenues, per the U.S. Travel Association, CY 2007 data. It's a key part of Mississippi's economic development engine.

This report's purpose is to estimate Tourism's economic contribution at the state and county level for FY 2008. Tourism is vital to Mississippi's economy, based on these estimates:

- Tourism accounted for 85,000 direct jobs in FY 2008, based on quarterly employment figures, a 0.4% decrease versus FY 2007. Approximately 83,000 of these FY 2008 jobs, or 97.6%, were private sector ones. The 85,000 direct jobs were 7.4%, of the total statewide establishment-based employment in FY 2008.
- Tourism accounted for 30,790 indirect/induced jobs in FY 2008. The total FY 2008 Tourism employment (direct plus indirect plus induced) was 115,790, a 5.6% decrease versus FY 2007.
- FY 2008 Tourism annual payroll for the 85,000 direct jobs was \$1.74 billion, a 0.9% increase from the \$1.72 billion annual payroll in FY 2007. The indirect/induced labor income was about \$822 million. Thus, the total labor income (direct payroll plus indirect/induced labor income) was about \$2.56 billion, or +4.9% versus FY 2007 levels of \$2.44 billion.
- The Tourism Industry ranked 6th in total FY 2008 direct employment, based on all sectors of Mississippi's economy.
- Tourism is one of Mississippi's largest export industries, and a major contributor to the state.
- FY 2008 Tourism expenditures by visitors of \$6.0 billion, a 4.6% increase versus FY 2007. Much of this increase—through June 30, 2008—was due to travel-generated inflation.
- Tourism's proportion of Mississippi's FY 2008 General Fund—\$390.1 million of the \$4.8 billion General Fund—was 8.1%, or \$1 of every \$12. The \$390.1 million was a 2.5% increase over the \$380.4 million in FY 2007 Tourism General Fund revenues.
- FY 2008 Tourism Capital Investment (TCI)—new/renovated contract construction costs—were \$687.6 million, a 23.2% decrease over FY 2007. About \$282.6 million, or 41.1% of this TCI total, were attributed to state-licensed casinos + amenities.
- FY 2008 Tourism state taxes collected were \$436.4 million, a 4.6% increase versus FY 2007.
- FY 2008 state-licensed casino taxes attributed to Tourism were \$165 million, or 37.8% of the Tourism state taxes collected; a portion are diverted to MDOT. Gasoline taxes are part of Tourism state taxes collected, but not in the Tourism General Fund revenues—they are diverted.
- FY 2008 City/County Tourism tax revenues (Room/Restaurant, state-licensed casinos, motor vehicle rental, Alcohol Beverage Control, petroleum TCI permit fees) were \$150 million, a 4.9% increase from FY 2007.
- Estimated Return on Investment (ROI) for the state's Domestic Consumer Ad Placement and Production Costs equaled about \$12 in FY 2008 and \$8 in FY 2007.
- The number of statewide hotel/motel rooms increased from 51,087 on June 30, 2007, to 53,719 on June 30, 2008, or 5.2%. Statewide hotels/motels increased from 609 as of June 30, 2007, to 652 as of June 30, 2008, or 7.1%.

- Mississippi's estimated 20.2 million total visitors in FY 2008, a 9.1% decrease from FY 2007, included 20 million domestic visitors (person-trips)—sum of overnight leisure + leisure day-trip + overnight/day business travelers + combined business/leisure travelers + pass-throughs + group tour visitors—plus an estimated 200,000 international visitors.
- An estimated 10.1 million domestic overnight leisure visitors in FY 2008 were down 4.7% versus the 10.6 million domestic overnight leisure visitors in FY 2007. These exclude business travelers, and international visitors who overnight.
- About 71% of the FY 2008 domestic overnight leisure visitors to Mississippi, were from out-of-state, or "Tourism Exports". This excludes day leisure, group tour, business travelers and international visitors.
- An estimated 80% of all FY 2008 household travel party expenditures were from out-of-state.
- Mississippi's net balance of Tourism trade—Tourism Exports (expenditures from out-of-state visitors in Mississippi) minus Tourism Imports (expenditures out of Mississippi)—and then minus the "leakage"—money eventually leaving the state from out-of-state visitor spending in Mississippi, or Tourism Exports—was about \$528 million.
- Tourism's estimated portion of the Gross State Product (GSP) was \$4.2 billion, or 4.7% in FY 2008, and \$4.2 billion, or 4.9% in FY 2007.
- Welcome Center registrants for FY 2008 totaled 2,337,880, a 6.0% increase versus the 2,206,418 recorded in FY 2007.

Estimated FY 2008 Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Tourism tax revenues and ROI figures cited on pages 4-6 include leisure dollars from in-state and out-of-state Mississippi tourists/visitors. They reflect some expenditures by pass-through travelers.

METHODS

The purpose of this report was to estimate Tourism's FY 2008 statewide economic contribution in terms of Total Value Added, Tourism 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 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 Tourism.

Other trends, e.g., Visitor Profile data, Highway Welcome Center highlights, and Airport passenger data, are covered. The Profile and Airport data are secured via surveys. Ditto for certain federal entities with an October to September FY: Vicksburg Military Park, Natchez National Historical Park, 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 as well, but the State Tax Commission compiles tax revenue information for these entities on a monthly and state FY basis. The State Tax Commission 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 through computer printouts.

Mississippi Gaming Commission (MGC) quarterly surveys are used to determine their operational budget, state-licensed casino hotel lodging variables, advertising expenditures, capital investment, among others. Other state agencies—with a Tourism connection—surveyed include the Mississippi Arts Commission (MAC), Department of Marine Resources, Department of Wildlife, Fisheries & Parks (DWF&P), Mississippi Museum of Natural Science (under DWF&P), Pearl River Basin Development District, and Pearl River Water Supply District.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the Mississippi Department of

Employment Security (MDES), Labor Market Information (LMI) Department, via monthly NAICS code averages, July 2007-June 2008. FY 2008 Gaming jobs/payroll data were secured from MGC quarterly surveys. An FY 2008 Outdoor Recreation Survey resulted in jobs/payroll data for a cross-section of outfitters, hunting/fishing guides, etc.

The proportion of estimated statewide Tourism expenditures is 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 Mississippi State Tax Commission and the Mississippi Department of Transportation (MDOT). The Petroleum Tax Division of the Mississippi State Tax Commission provided sales and collections data for gasoline and undyed diesel fuel at 18 cents.

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

Tourism's Broader View and Economic Development are on pages 17-19. These state level indicators focus on Gross State Product, Total Value Added, Total Value Added to Expenditures, State-level Tourism Accounts, Employment and Labor Income Multipliers, Tourism Exports and Imports, Estimated Effective Tax Rates, and Employment Rankings.

FINDINGS

Gaming (state-licensed), Restaurant and Lodging jobs were the top three in terms of direct Tourism Employment, in Mississippi, based on Appendix A. The 26,800 state-licensed casino gaming jobs, excluding casino hotels, represented 31.5% of direct Tourism Employment. When state-licensed casino hotel employment totals (3,450) are added to the casinos, their combined direct employment total is 30,250, or 35.6% of direct Tourism jobs. All other direct Tourism jobs totaled 54,750, or 64.4% of direct FY 2008 Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY 2007/2008. The narrative section on page 17 summarizes data on indirect/induced jobs. Appendix B shows FY 2007/2008 payroll-related information by employment component. The indirect/induced labor income multipliers are presented on pages 18.

Estimated Tourism expenditures by visitors were \$5.7 billion in FY 2007 and \$6 billion in FY 2008, per Appendix C. FY 2007/2008 estimated General Fund revenues are in Appendix D. These estimates totaled \$380.4 million in FY 2007 and \$390.1 million in FY 2008. Tourism's \$390.1 million portion of the FY 2008 General Fund was 8.1%. It includes the estimated Tourism-related construction activity amount, Personal Income, Sales Tax and all other taxes.

Appendices E and F, respectively, have estimated FY 2007/2008 county level Tourism Expenditures, direct Tourism Employment, the Tourism employment percentage, State and Local Sales Taxes attributed to Tourism, and Tourism Capital Investment data.

Appendix G presents the FY 2007/2008 statewide and countywide hotel/motel room data. Appendix H has 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 Ad Effectiveness/Visitor Profile studies are highlighted, primarily as FY 2008 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 2008, with 2,337,880 registrants out of 2,906,700 persons serviced. Most Welcome Center registrants are U.S. residents. International travelers, in FY 2008, comprised 48,790, or 2.1% of the 2,337,880 registrants. This proportion was 1.9% in FY 2007 based on 42,599 international registrants. U.S. registrants increased by 5.8% between FY 2007 and FY 2008; the international component increased by 14.5%; and total registrants increased by 6.0%, per Table 1. Louisiana, Mississippi, Alabama, Texas, Florida and Georgia held the top six spots in FY 2007/2008, per Tables 2/3. Canada had the most international registrants—38.3% market share in FY 2007 and 34.9% market share in FY 2008, per Tables 4/5.

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 15th year of operation in June 2008 with \$385,269 in revenue, 4,372 reservations and 5,670 room nights booked.

Regional Airport/Air Passenger Data

Mississippi's Regional/International Airports reported 1,296,508 enplanements in FY 2008, a 6.6% increase over FY 2007. The two International/five Regional Airports, plus Tunica County's Airport/others with non-scheduled service had capital expenditures and improvements.

The Jackson-Evers International Airport enplaned 712,218 passengers, or 54.9%, of all FY 2008 passengers enplaned in Mississippi. Its 40 daily nonstop flights to 12 cities/14 airports, included Atlanta, Baltimore, Charlotte, Chicago, Cincinnati, Dallas, Detroit, Houston, Memphis, Newark, Orlando, and Washington, D.C. Jackson-Evers reported \$2.7 million in capital improvement projects during FY 2008. This airport is a vital cog for the state's air traffic activity.

Gulfport-Biloxi's International Airport reported 489,972 enplanements in FY 2008 (July 2007-June 2008), an 18.9% increase versus 411,971 in FY 2007. Seven carriers—Air Tran, ASA/Delta, Allegiant, American, Continental, Northwest and USAir—served. Cities served in FY 2008: Atlanta, Charlotte, Chicago, Dallas-Ft. Worth, Ft. Lauderdale, Houston, Memphis, Orlando, and Tampa. Air Tran and Allegiant discontinued airline service. Atlanta, Charlotte, Dallas-Ft. Worth, Houston and Memphis were cities served as of 1/1/2009. They cited \$51.6 million in estimated FY 2008 capital expenditures and improvements.

FY 2008 charter flights: Gulfport-Biloxi—216 flights/10,708 passengers, with many cities of origin, e.g., Myrtle Beach, Nashville, Richmond, Washington, D.C.; Hattiesburg-Laurel—20 flights/875 passengers; Golden Triangle—60 flights, 2,150 passengers; Tupelo—20 flights/1,170 passengers; and Mid-Delta—5 flights/417 passengers.

The Tunica County Airport had 45,263 total charter enplanements in FY 2008 and 435 departures. The 73 cities throughout the U.S. included Atlanta, Gulfport, New Orleans, Shreveport, West Palm Beach, among others. Some \$6.2 million in estimated net capital expenditures and improvements were made to the Tunica County Airport in FY 2008.

Motor Coach Snapshot

The FY 2008 snapshot featured feedback from 18 Tourism Partners, including two with significant motor coach activity: Harrison and Tunica County. Some 677,623 passengers were on 19,464 tours, or 34.8—on average—per tour. The 2,989 overnight tours comprised 15.4% of total tours. Average number of nights equaled 2. Tour expenditures were \$59.3 million. And the 677,623 reported passengers accounted for about 3.4% of the 20.2 million statewide visitors.

Ad Effectiveness Studies, FY 2007/FY 2008 (Sources: TNS, July 2007; DPA, July 2008)

The on-line studies surveyed in-state and out-of-state households within a 500-mile radius of Mississippi. Some goals are to identify the proportion of households that are aware of the state's advertising, measure the incremental travel that could be attributed to the MDA/Tourism Division's advertising campaign via Return on Investment (ROI) and evaluate trip satisfaction. The estimated FY 2008 ROI was \$12, based on the Tourism General Fund revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's domestic consumer ad placement costs. It was \$8 in FY 2007. Our FY 2008 domestic consumer advertising contributed about \$24.6 million, or 6.3%, to Tourism's \$390.1 million portion of Mississippi's General Fund.

Other tools measured include intent to visit a destination, image ratings, commitment and ad recognition. FY 2008 print ads captured the attention of one-third (33%) of all respondents; one in eight (12%) prospective visitors recognized the MDA/Tourism Division's TV spots. For print ads, the Golf placement was the most widely recognized (23%), followed by Cooking (14%) and Music (12%). The Golf TV spot was also the most frequently recognized by respondents. Findings reflected strong visitation with ½ the target market having taken a trip to the state, with 17% doing so in the past year; high trip levels of trip satisfaction and word-of-mouth recommendation to friends/associates; our 12 Welcome Centers are succeeding in extending visitors' stays in Mississippi and convincing them to visit more attractions.

Visitor Profile Studies, FY 2007/FY 2008 (Sources: MGC, STR, TNS, others October 2008)

Some 20.2 million estimated total visitors (person-trips) in FY 2008—all domestic leisure plus all business plus all group travel plus international visitors—overnighted in, or did a day trip to Mississippi: 20 million domestic plus an estimated 200,000 international visitors. The 20.2 million included a reported 677,623 group travelers. Sources were the TNS FY 2008 study, Mississippi Gaming Commission (MGC) quarterly surveys—patrons by state of origin and occupancy rates for state-licensed casino hotels; monthly Smith Travel Research (STR) surveys; Mississippi Highway Welcome Center registration data, Outdoor Recreation surveys, etc.

TNS reported 79% (4/5) as leisure travelers, or tourists; 11% business or combined business/leisure; and 10% personal business/other in FY 2008. Domestic overnight leisure person-trips totaled about 10.1 million, a 4.7% decrease from the 10.6 million in FY 2007, based on various sources. About 71% of the overnight leisure person-trips were from out-of-state, similar to the 73% in FY 2007. Some 85% of all FY 2008 overnight leisure visitors came from 10 states—Mississippi, Louisiana, Florida, Alabama, Texas, Tennessee, Georgia, Arkansas, Illinois and Missouri. The top five origin Designated Market Areas (DMAs) were Jackson (Mississippi), Memphis, Columbus-Tupelo-West Point, New Orleans, and Mobile-Pensacola.

Median annual household income for all Mississippi visitors was \$59,700 (½ were above and ½ were below this level), versus \$59,800 in FY 2007, per TNS. Their average age was 47, identical to FY 2007. Average travel party size was 2.9 persons. About 39% (2/5) traveled in pairs. Another 26% traveled with children. The average number of children—for those traveling with children—was 1.7. Only 7% of all visitors arrived by air. Some 58% of all visitors stayed in paid accommodations. On average, they spent 2.9 nights in Mississippi, versus 2.6 nights in FY 2007. Vacation activity niche characteristics varied by interest, with casino gamers the largest market, and golfers the most lucrative segment [\$1,471/travel party].

**TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY U.S.
AND INTERNATIONAL TRAVELERS, FY 2007 AND FY 2008**

Origin	FY 2007 Registrants	FY 2008 Registrants	Percentage Change
States	2,163,819	2,289,090	5.8%
Countries	42,599	48,790	14.5%
Total	2,206,418	2,337,880	6.0%

NOTE: Tables 1-5 only reflect those visitors who completed the registration forms.
SOURCE: MDA/Tourism Division, 2008.

**TABLE 2
HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN STATES, FY 2007**

State	Registrants	Percentage of States	Percentage of Top Ten
Louisiana	422,263	19.5%	23.6%
Mississippi	374,664	17.3%	21.0%
Alabama	235,740	10.9%	13.2%
Texas	188,624	8.7%	10.5%
Florida	157,637	7.3%	8.8%
Georgia	137,845	6.4%	7.7%
Tennessee	106,364	4.9%	5.9%
Arkansas	75,636	3.5%	4.2%
Missouri	45,983	2.1%	2.6%
Illinois	43,497	2.0%	2.4%
Other	375,566	17.4%	NA
Total	2,163,819	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2007.

**TABLE 3
HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN STATES, FY 2008**

State	Registrants	Percentage of States	Percentage of Top Ten
Louisiana	438,282	19.1%	23.2%
Mississippi	404,708	17.7%	21.5%
Alabama	240,056	10.5%	12.7%
Texas	210,482	9.2%	11.2%
Florida	167,293	7.3%	8.9%
Georgia	135,164	5.9%	7.2%
Tennessee	114,670	5.0%	6.1%
Arkansas	76,589	3.3%	4.1%
Missouri	52,257	2.3%	2.8%
Illinois	47,115	2.1%	2.5%
Other	402,474	17.6%	NA
Total	2,289,090	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2008.

**TABLE 4
HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN COUNTRIES, FY 2007**

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	16,334	38.3%	45.8%
Germany	5,319	12.5%	14.9%
England	3,796	8.9%	10.6%
Mexico	3,571	8.4%	10.0%
France	2,538	6.0%	7.1%
Holland	1,384	3.2%	3.9%
Australia	1,229	2.9%	3.4%
Switzerland	675	1.6%	1.9%
Japan	451	1.1%	1.3%
Sweden	369	0.9%	1.0%
Other	6,933	16.3%	NA
Total	42,599	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2007.

**TABLE 5
HIGHWAY WELCOME CENTER REGISTRANTS, TOP TEN COUNTRIES, BY 2008**

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	17,024	34.9%	44.6%
Germany	5,031	10.3%	13.2%
England	4,846	9.9%	12.7%
Mexico	4,451	9.1%	11.7%
France	2,325	4.8%	6.1%
Australia	1,482	3.0%	3.9%
Holland	1,240	2.5%	3.3%
Japan	642	1.3%	1.7%
Sweden	559	1.1%	1.5%
South Africa	538	1.1%	1.4%
Other	10,652	21.8%	NA
Total	48,790	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2008

GAMING

Mississippi had 29 state-licensed casinos as of June 30, 2008 versus 28 state-licensed casinos at the start of FY 2007, or +3.6%. There were 30 state-licensed casinos as of 2/1/2009.

Gaming Revenues

Total state-licensed casino gross gaming revenues were \$2.84 billion in FY 2008. About \$2.04 billion of this total, or 71.8%, were the estimated “net” tourist/visitor revenues. This tourist/visitor portion comprised 33.9% of the \$6 billion in statewide Tourism expenditures.

Mississippi’s total gaming-related tax revenues were \$344.6 million in FY 2008—\$230 million in state receipts; \$114.6 million for cities/counties. Tourism accounted for an estimated \$165 million of the \$230 million and \$82.8 million of the \$114.6 million, respectively. Some \$194 million, or 84.3% of the \$230 million in gross gaming state tax receipts, went into the General Fund; and \$36 million, or 15.7%, was diverted to MDOT. Tourism’s estimated slice of the \$194 million in General Fund gaming dollars was \$139.2 million, or 71.8%. The \$139.2 million equaled 35.7% of Tourism’s \$390.1 million contribution to the General Fund.

FY 2007/2008 state-licensed casino gross gaming revenue market share by Gaming Region—North and South River and Coastal—comprises Table 6. Table 7 includes the percentage change in gross gaming revenue by Regions between FY 2007/2008.

Mississippi Gaming Commission (MGC) Quarterly Survey Trends

About 73% of all FY 2008 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 83% of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Missouri, Oklahoma, Alabama, and Georgia patrons.

About 38% of the South River Region—Greenville, Natchez and Vicksburg—casino patrons were from out-of-state; e.g., Arkansas and Louisiana, while 75% of Coastal Region casino patrons were from out-of-state. Louisiana, Florida, Alabama, Georgia and Texas were the top five states for out-of-state Coastal Region casino patrons.

Twenty-nine state-licensed casinos contributed to the local/state economy through an FY 2008 payroll of \$848.4 million, up 7.5% over FY 2007. FY 2008 advertising and promotional expenditures attributed to state-licensed casinos were \$116.3 million, a 22.6% increase versus FY 2007. Casino patrons stayed in casino hotels in three gaming regions, per Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY 2007/2008 quarterly averages. State-licensed casino hotel rooms increased from 11,660 (FY 2007) to 12,361 (FY 2008), or by 6.0%.

An estimated \$282.6 million in Tourism Capital Investment (TCI) for casinos/amenities were attributed to the state-licensed casinos and/or new development in FY 2008, or 41.1% 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, site prep.

Gaming Employment

FY 2008 quarterly casino employment figures came from the MGC via their quarterly surveys. FY 2008 figures reflect 26,800 state-licensed casino employees and 3,450 persons employed at state-licensed casino hotels. These combined 30,250 jobs (casinos + casino hotels) were 35.6% of all estimated statewide direct Tourism jobs.

NonGaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$282.4 million in FY 2008; food and beverage revenue accounted for \$476 million, based on MGC data. This is significant. FY 2008 retail sales at state-licensed casinos was \$131.2 million. All dollar amounts are gross sales. A portion of lodging, food & beverage, and other amenities/services are comped.

**TABLE 6
GROSS GAMING REVENUE MARKETSHARE BY REGION, FY 2007 AND FY 2008**

Region	FY 2007 Gross Gaming Revenue	Percentage of FY 2007 Total	FY 2008 Gross Gaming Revenue	Percentage of FY 2008 Total
Coastal	\$1,190,556,479	42.4%	\$1,306,711,001	46.0%
North River	1,284,077,435	45.7%	1,178,731,336	41.6%
South River	335,750,253	11.9%	351,201,002	12.4%
Total	\$2,810,384,167	100.0%	\$2,836,643,339	100.0%

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2008.

**TABLE 7
GROSS GAMING REVENUE PERCENTAGE CHANGE BY REGION, FY 2007 AND FY 2008**

Region	FY 2007 Gross Gaming Revenue	FY 2008 Gross Gaming Revenue	Percentage Change
Coastal	\$1,190,556,479	\$1,306,711,001	9.8%
North River	1,284,077,435	1,178,731,336	-8.2%
South River	335,750,253	351,201,002	4.6%
Total	\$2,810,384,167	\$2,836,643,339	0.9%

NOTE: Table 6 and 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 Mississippi State Tax Commission, Miscellaneous Tax Division, 2008.

**TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2007**

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate	REV PAR*
Coastal	8	5,002	83.0	\$77.32	\$64.18
North River	12	5,886	85.5	60.51	51.74
South River	6	772	64.8	69.68	45.15
Total/Average	26	11,660	83.0	\$68.12	\$56.54

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2006-2007.

**TABLE 9
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2008**

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate	REV PAR*
Coastal	9	5,554	83.6	\$79.80	\$66.71
North River	12	6,069	83.2	60.28	50.15
South River	7	739	65.6	67.07	44.00
Total/Average	28	12,362	82.3	\$69.51	\$57.21

* REV PAR =Revenue per Available Room, or Occupancy Percent times Average Daily Rate.

NOTE: Table 8 and Table 9 figures reflect fiscal year quarterly averages. A portion of the casino hotel rooms are traditionally comped.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2007-2008.

INTERNATIONAL TRAVEL

This section highlights some international travel items for FY 2007/2008. MDA/Tourism Division began tracking international travel to Mississippi in CY 2001 via specific surveys at certain attractions. The following information is separate from the number of international Welcome Center Registrants.

FY 2007 and FY 2008 Visitor Sample

FY 2008 target markets were determined for 17 countries where the MDA/Tourism Division has marketing activities, e.g., England, Scotland, Ireland, Canada, Holland, France, Denmark, Belgium, Switzerland, Sweden, Norway, Austria, Germany, Japan, Australia, Mexico, and Wales. Representation is from Best Choice (Germany), Lofthouse Enterprises (Europe), Advance International (Japan) and Lakeview Productions (Canada).

Survey forms are sent to participating attractions on a quarterly basis to secure international visitor data, e.g., number of visitors by country of origin for selected attractions. These attractions are in the state's five Tourism Regions with cities/areas. Table 10 data comprise complete information for FY 2007/2008 in terms of target market countries.

The number of international visitors to surveyed attractions increased by 11.6% from FY 2007 to FY 2008, based on survey respondents. This does not reflect actual rates of change for all international visitors, nor includes a significant number of Canadians, the state's largest market share with perhaps 35%–40% of all international visitors.

Per MDA/Tourism Division's International and Domestic Trade Manager: In FY 2008, the MDA/Tourism Division's International Marketing Program coordinated successful media familiarization tours throughout the state. Hosting travel writers and members of the press from our international target markets has proven important in our efforts to attract foreign visitors to the state. Over 32 journalists from seven countries visited Mississippi and produced radio shows, magazine features and newspaper articles on various points of interest for Mississippi. These forms of mass media reached over 13 million consumers in the international market. This is strictly based on publication circulation and radio listeners.

Also, FY 2008 marked the seventh year for a benchmark series with the international markets. Five state attractions have reported their international visitation for each quarter. According to these statistics, our foreign visitors have increased by 150%. Considering the impact the weak US dollar has made and that September 11th and Hurricane Katrina fell during this time period, these are impressive statistics.

TABLE 10
TOP TARGET MARKETS FOR INTERNATIONAL VISITOR ATTRACTIONS, FY 2007 AND FY 2008

Country	FY 2007 Market Total	Target Percent FY 2007 Total	Country	FY 2008 Market Total	Target Percent FY 2008 Total
England	5,677	49.5%	England	8,990	43.4%
Canada	2,121	18.5%	Canada	3,075	14.9%
Germany	642	5.6%	Ireland	1,157	5.6%
Scotland	507	4.4%	Scotland	1,110	5.4%
Ireland	494	4.3%	Germany	1,050	5.1%
Australia	462	4.0%	Australia	998	4.8%
Sweden	395	3.4%	Holland	914	4.4%
Holland	373	3.2%	Norway	614	3.0%
Japan	190	1.7%	France	538	2.6%
Norway	157	1.4%	Denmark	536	2.6%
France	130	1.1%	Sweden	488	2.4%
Belgium	73	0.6%	Belgium	487	2.4%
Denmark	71	0.6%	Japan	268	1.3%
Mexico	68	0.6%	Switzerland	241	1.2%
Switzerland	68	0.6%	Austria	145	0.7%
Austria	46	0.4%	Mexico	83	0.4%
Wales	4	0.0%	Wales	13	0.1%
Sub-Total	11,478	100.0%	Sub-Total	20,707	100.0%
Other	756	NA	Other	1,355	NA
Total	12,234	100.0%	Total	22,062	100.0

NOTE: The Target percent is the country divided by the sub-total. It does not include countries that are not part of the target market.

SOURCE: MDA/Tourism Division, 2008.

OUTDOOR RECREATION

Employment, payroll and revenue figures for the MDWFP, 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 11 lists FY 2008 park visitation. Per the MDA/Tourism Division's Outdoor Recreation Program Manager: The economic contribution of outdoor recreation is felt far and wide all across the state and its participant pockets are deep. This is indeed 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 the "State Overview." These reports came as a result of the last national census and conducted interviews of citizens' activity rates in outdoor recreation including hunting, fishing, and wildlife watching.

In 2006 Mississippi had 534,000 citizens that participated in fishing. A total of 309,000 went hunting. And 613,000 were active in wildlife watching around their homes and 242,000 spent time and money to travel away from home to watch wildlife. Fishing expenditures totaled \$239,223,000 while hunters spent \$557,565,000. Wildlife watchers forked out \$181,759,000 for their activities. This is about some real money spent right here in Mississippi by our population.

These expenditures include trip expenses for fishing and hunting totaling \$101,687,000 and \$136,193,000,

respectively. Fishermen spent \$118,876,000 on equipment, while hunters spent another \$178,902,000. This is a considerable amount of money spent on these forms of outdoor recreation for a state population as small as ours. It's difficult to compile exactly how or on what this money was spent, though the report's breakdown includes food and lodging, transportation, other trip costs, fishing and hunting equipment, auxiliary and special equipment. It is not defined any further than that, but the dollars spent on outdoor recreation speaks loudly.

If one looked at the whole state, it's easy to see many of the obvious businesses that benefit from sales and services related to hunting, fishing, and wildlife watching. The list would contain tens of thousands of businesses from around the state. Let's not forget motels, restaurants, grocery stores, hardware stores, lumber suppliers, oil/gas distributors, insurance agents, clothing stores, meat processors, taxidermy shops, etc. All these businesses and more take in revenue from outdoor sportspeople. The final statement comes to \$978,547,000 just in Mississippi. Now run 7% on that figure and see the huge contribution made by the outdoor recreation sports of hunting, fishing, and wildlife watching to this state's overall economy.

**TABLE 11
STATE PARK VISITATION, FY 2007/FY 2008**

Park	FY 2007 Visits	FY 2008 Visits	Change
Clark Creek	6,024	7,347	22.0%
Clarkco	63,883	75,101	17.6%
George P. Cossar	47,006	55,370	17.8%
Golden Memorial	1,707	456	-73.3%
Great River Road	27,158	11,071	-59.2%
Holmes County	41,869	44,420	6.1%
Hugh White	54,456	50,307	-7.6%
J.P. Coleman	74,470	81,772	9.8%
John W. Kyle	66,152	66,202	0.1%
Lake Lincoln	47,588	49,513	4.0%
Lake Lowndes	79,344	80,706	1.7%
LeFleur's Bluff	130,923	126,585	-3.3%
Legion	16,075	17,940	11.6%
Leroy Percy	14,042	17,485	24.5%
Natchez	20,370	23,872	17.2%
Paul B. Johnson	148,719	133,630	-10.1%
Percy Quin	70,866	74,346	4.9%
Roosevelt	88,798	91,865	3.5%
Shepard	7,842	7,737	-1.3%
Tishomingo	50,344	57,067	13.4%
Tombigbee	30,532	30,941	1.3%
Trace	52,054	54,374	4.5%
Wall Doxey	50,677	54,284	7.1%
Total	1,190,899	1,212,391	1.8%

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks (MDWFP), 2008.

TOURISM'S BROADER VIEW AND ECONOMIC DEVELOPMENT

MDA/Tourism Division's Research Unit has worked on the "Broader View" project—an effort to estimate Tourism's contributions within the broader state economy in terms of employment, General Fund revenues, construction activity, among other components—since the late 1990s. These efforts culminated with the FY 2004 "Broader View" indicators in the spring of 2005. This "Broader View" enables Tourism—which is a "Composite Industry" comprising different sectors of the economy—to be more clearly and precisely defined within the overall economy.

Gross State Product/Total Value Added/State-level 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. Tourism's share of GSP can be estimated via State-level 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 Unit estimated Tourism's Total Value Added—the contribution of an industry to GDP or GSP. This includes Tourism's proportion of the GSP, the indirect/induced contribution for Tourism Employment and Labor Income, the effective tax rates for personal income tax, sales tax and other taxes, plus other economic indicators.

The direct, indirect and induced effects of Total Value Added from Mississippi's statewide Tourism data were matched to their IMPLAN description, for gasoline stations, food services and drinking places, Tourism Capital Investment (TCI), etc. And the result was Tourism's Total Value Added as a percentage of the state total.

Mississippi's GSP was \$86.3 billion in FY 2007 and \$88 billion in FY 2008. About ¼ of Mississippi's GSP was in Goods-Producing Sectors; ¾ in Services-Producing Sectors. Tourism's Total Value Added of Mississippi's GSP, was \$4.2 billion, or 4.9%, in FY 2007; and \$4.2 billion, or 4.7% in FY 2008. Tourism's 4.7% total contribution to the GSP is lower than Tourism's Employment concentration of 7.4% and Tourism's 8.1% slice of General Fund Revenues. The direct portion only of FY 2008 TV Added to expenditures shows that 44 cents out of each Tourist Dollar spent, including TCI, stays in Mississippi. Tourism's direct value added in terms of direct visitor expenditures was \$2.6 billion in FY 2008, or 3.0% of GSP. TCI's direct value added was \$266.6 million, or 0.3% of GSP.

Food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation, TCI and transportation were part of the Tourism Industry GSP. Casino gaming, food services and drinking places, and lodging comprised a major portion of Mississippi's Tourism Industry GSP in FY 2008. This industry's composite nature needs to be emphasized.

Mississippi's economy reflected a FY 2008 unemployment rate of 6.3%, based on a 12-month average. The state had a civilian labor force of 1,325,700, with an average of 84,000 unemployed persons in FY 2008. Metropolitan Statistical Areas (MSAs) for counties with a significant Tourism industry had these FY 2008 unemployment rates: 5.2% for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 5.7% for Pascagoula (Jackson and George counties); 5.1% for Hattiesburg (Forrest, Lamar and Perry counties); and 5.2% for Jackson (Copiah, Hinds, Madison, Rankin and Simpson counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, taken together, form a consolidated MSA. This consolidated MSA had a 5.4% unemployment rate in FY 2008. Memphis's MSA includes DeSoto and Tunica Counties. DeSoto County's FY 2008 unemployment rate was 4.5%; Tunica County's was 8.9%.

Employment Multipliers (Indirect/Induced)

IMPLAN includes the indirect (business or firm level) and the induced (personal or individual level) multipliers. Taken together—direct plus indirect plus induced divided by the direct contribution—provides an estimate of the employment

multiplier filtered through a Social Accounting Matrix (SAM). The FY 2007/2008 Employment Multipliers for Mississippi were 1.44 and 1.36, respectively. The 85,300 estimated statewide direct FY 2007 Tourism jobs resulted in an additional 37,295 indirect plus induced jobs, while the 85,000 statewide direct Tourism jobs in FY 2008 resulted in an additional 30,790 indirect plus induced jobs. Total FY 2008 jobs associated with Tourism were 115,790. FY 2008 Employment multipliers varied by description—1.43 for lodging, 1.24 for food services and drinking places, among many others.

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). Mississippi's FY 2007 Labor Income Multiplier was 1.41 based on total labor income of \$2.44 billion—\$1.724 billion (direct) and \$716 million (indirect/induced). The FY 2008 Labor Income Multiplier for Mississippi was 1.47 with Total labor income of \$2.56 billion—\$1.74 billion (direct) and \$822 million (indirect/induced). IMPLAN codes were used to compute the FY 2007/2008 Labor Income Multipliers.

Tourism Exports and Imports

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 Tourism Trade, defined as Tourism Exports (expenditures from out-of-state visitors in Mississippi) minus 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, or Tourism Exports—was about \$528 million, or monthly average of \$44 million.

Out-of-state visitors spent an estimated \$4.8 billion in Mississippi, or 80% of the \$6.0 billion spent by tourists/visitors in FY 2008. Mississippians spent \$3.6 billion traveling out-of-state. Mississippians traveling within the state—50 miles or more, one-way—spent an estimated \$1.2 billion on FY 2008 in-state trips.

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 Unit estimates Tourism-related dollars from personal income taxes, sales taxes and all other taxes, plus construction activity tax that go to the General Fund. An estimated \$92.6 million in Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2008, a 1.7% increase versus FY 2007. The \$14.6 million from the Tourism-related construction activity tax in the General Fund reflected a 22.0% decrease versus FY 2007.

Employment Rankings

The Tourism Industry ranked 6th in total estimated FY 2008 direct employment, behind Government, Wholesale/Retail Trade, Manufacturing, Health Care & Social Assistance, and Professional & Business Services. Most of the direct FY 2008 Tourism jobs—83,000 of the 85,000 statewide direct Tourism jobs—or 97.6%—were private sector ones (hotels/motels, restaurants, casinos). The other 2.4% were held by employees in state parks, federal parks, private outdoor recreation, regional and international airports, museums, historic sites, state/local Tourism offices, museums, performing arts centers and spectator sports sites.

Mississippi's 85,000 statewide direct Tourism jobs in FY 2008 equaled 7.4 of the state's establishment-based nonfarm jobs, per Appendix F. In FY 2007, the 85,300 statewide direct Tourism jobs were 7.4% of all jobs, per Appendix E. The state's nonfarm employment rankings reflect sectors and super sectors, per their definition on page 27. Table 12 presents Mississippi's FY 2008 nonfarm, establishment-based employment rankings for direct jobs by the top sectors/super sectors.

TABLE 12
MISSISSIPPI NONFARM ESTABLISHMENT-BASED EMPLOYMENT RANKINGS, DIRECT JOBS,
TOP SECTORS/SUPER SECTORS, FY 2008

Sector	FY 2008 Establishment Based Employment	FY 2008 Employment Percentage	FY 2008 Rank
Government (1)	243,360	21.1%	1
Wholesale/Retail Trade (2)	174,165	15.1%	2
Manufacturing (3)	167,050	14.5%	3
Educational & Health Services (4)	127,160	11.0%	4
Professional & Business Services (5)	95,225	8.2%	5
Tourism (6)	85,000	7.4%	6
Leisure & Hospitality (7)	55,315	4.8%	7
Construction (8)	53,470	4.6%	8
Transportation&Warehouse/Utilities (9)	47,635	4.1%	9
Financial Activities	46,790	4.1%	10
Other Services (10)	36,770	3.2%	11
Information	13,285	1.2%	12
Natural Resources & Mining	9,700	0.8%	13
Total Employment	1,154,925	100.0%	NA

1. Excludes an estimated 2,000 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 136,965 non-Tourism jobs. Does not include an estimated 8,235 Tourism jobs directly related to Retail Trade.
3. Durable goods comprised 111,460 jobs, or 2/3, of Manufacturing jobs.
4. Health Care & Social Assistance was the dominant component with 111,610 jobs.
5. Excludes 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 Tourism, based on the definition based on the definition of a Tourist/Visitor on page 27. Those jobs not directly related to Tourism are included in the Leisure & Hospitality Super Sector. Appendix A includes a breakdown of the FY 2008 direct statewide Tourism jobs.
7. Reflects the Leisure & Hospitality employment not related to Tourism.
8. Excludes Tourism-related Construction.
9. Excludes Tourism-related Transportation.
10. Excludes 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, 2008.

LOCAL LEVEL INDICATORS

Local 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, available Tourism Capital Investment (TCI) permit fees.

Taxes/Fees Returned to Cities/Counties Attributed to Tourism

Tourism's contribution to the local economy includes City/County tax revenues and permit fees. About \$82.8 million, or 55.2% of the estimated \$150 million in taxes/fees returned to Cities/Counties attributed to Tourism came from state-licensed casinos. The remaining—roughly 44.8% portion—were from Room/Restaurant special tax revenues, Seawall Taxes for three Mississippi Gulf Coast counties, ABC permit license fees, petroleum taxes, motor vehicle rentals and local TCI permit fees.

MDA/Tourism's Division Research Unit also tracks the estimated portion of the state sales tax returned to cities attributed to Tourism. FY 2007 and FY 2008 computations were made for nearly 300 municipalities. An estimated \$37.7 million allocated to municipalities from 18.5% of the 7.0% state sales taxes were attributed to Tourism in FY 2007. It was \$39.7 million in FY 2008, or +5.3% versus FY 2007. These monies originate at the state tax level.

Room/Restaurant tax percentages range from 1% to 5%. Table 13 presents these tax percentages by jurisdiction, plus FY 2008 gross Tourism special tax revenue. About \$35 million, or 2/3, of the gross FY 2008 special tax revenues were from restaurant sales with \$17.4 million, or 1/3, from lodging sales. Special tax revenues totaled \$52.4 million. Ocean Springs received special Restaurant tax revenues for the first time in FY 2008.

County Tourism Expenditures/Employment and Hotel/Motel Room Data

Estimated FY 2007/2008 Tourism expenditures and employment data for the state's 82 counties, estimated Tourism employment percentage, state and local taxes attributed to Tourism, and TCI comprise Appendices E and F. The sum of the county level Tourism Expenditures is less than the total estimated statewide Tourism expenditures, per the first set of footnotes.

Mississippi's 652 total hotel/motel properties as of June 30, 2008, reflected a 7.1% increase compared to the 609 total hotel/motel properties as of June 30, 2007, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms increased from 51,087 as of June 30, 2007, to 53,719 as of June 30, 2008, or 5.2%, per Appendix G. It's estimated that 3,470 new statewide hotel/motel rooms were under construction between July 2008 -January 2009, or 6.5% above June 2007 inventory levels.

Mississippi had an estimated 158 Bed & Breakfasts (B & B's) as of June 30, 2008, with 737 total B & B rooms, 618 cabin rooms, 1,203 condo/timeshare rooms and 11,887 recreational vehicle (RV) spaces with electricity and water, per the FY 2008 MDA/Tourism Division survey.

The 12-month statewide average daily rate (ADR), based on STR and Mississippi State Tax Commission data through June 2008, was \$73.35. Mississippi's estimated 12-month statewide occupancy percent was 61.1 using STR. These STR indicators include corporate and franchise properties, but not the state-licensed casino hotels, whose occupancy percent (82.3) were much higher than the STR statewide figures, per Table 9. State-licensed casino hotel rooms accounted for 12,926, or 24.1%, of all statewide hotel/motel rooms, as of June 30, 2008.

Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY 2008

Our 57 Tourism Partners—CVB's, Tourism Commissions, Chambers, etc.—received FY 2008 Advertising and Employment/Payroll mini-surveys for the October 2007-September 2008 time frame. Twenty-five responded to the Advertising survey and 23 to the Employment one, including some zeros. Most of the CVB's responded; a lesser portion of the non-CVB's did so.

FY 2008 Tourism Employment/Payroll data reflected 124 full-time equivalent staff with a \$5.3 million payroll, based on participating Tourism Partners. The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category. These respondents—as a group—reflected a total estimated FY 2008 Tourism Budget of \$17.8 million.

About \$12.6 million were spent by the respondents, based on the FY 2008 Advertising survey, with \$4.33 million of this amount, or 34.4%, on Ad Placement. Ad survey responses indicated that respondents spent: \$734,372 in Ad Agency fees; \$4,329,233 in Ad Placement costs; some \$507,356 in Ad Production costs; \$296,027 for Promotional items; \$317,180 for Trade Show Participation costs; \$57,904 for FAM Tours; \$695,283 for Billboard Advertising; \$768,140 for Brochure, Collateral and Other Printing; \$1,958,783 in Sponsorships/Local Events; \$704,014 for web site maintenance; \$409,989 in State Matching Grant funds; and \$1,809,464 from other Grant Programs—mainly CVB's in South Mississippi, plus one in the north west.

STATEWIDE TOURISM LINKS

Film Productions, Documentaries and Commercials

During the 2008 Legislative session, the Mississippi Motion Picture Incentive Program was improved and simplified. The tiered rebate system was streamlined to 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. A minimum spend of \$20,000 per project was established, as well as a \$20 million annual rebate cap. The amount of rebate per project was increased from \$5 million to \$8 million. Along with the established tax exemptions and reductions, the Mississippi program becomes one of the country's best.

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 2008, 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.

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 Natchez Food Festival, and the Oxford Film Festival. Additionally, the Film Office supported the Southern Circuit Film Series at Millsaps College and provided funding to film programs (Crossroads Film Society, Mississippi Film and Video Alliance) in support of Mississippi filmmakers and audiences.

Selected State Agencies with Tourism Links: FY 2008 Operations/Budget 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 2008 (state) Government Expenditures were \$34 million.

The MAC reported \$631,165 in contractual services, and \$1,160,574 in subsidies, loans and grants, separate from the (public funds component) Building Fund for the Arts Program. MGC budgeted \$2,474,024 for contractual and subsidies, loans and grants, with \$100,300 in contractual. Our Pearl River Basin Development District had \$154,069 for contractual and \$486,952 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget reflected \$2,699,734 for contractual, plus \$536,147 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences indicated \$900,000 for contractual services and \$200,000 for subsidies, loans and grants. Mississippi's Department of Marine Resources cited \$8,750,118 in Contractual Services; \$2,235,473 in Federal subsidies, loans and grants; and \$2,565,579 in State subsidies, loans and grants. Their Seafood Marketing Program and Saltwater Fishing Program budgets were \$50,000 each. During the 2007 Legislative Session the Mississippi Legislature appropriated \$8,375,124 for the purpose of providing funds for Tourism and Welcome Centers program costs, for the fiscal year beginning July 1, 2007 and ending June 30, 2008. MDOT spent \$4,874,795 to maintain Welcome Centers and Rest Areas, including contract and routine expenses. Their National Scenic Compact Scenic Byways Marketing Grants totaled \$247,173.

**TABLE 13
ROOM/RESTAURANT GROSS SPECIAL
TAX REVENUES BY TOURISM OFFICE, FY 2008**

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2008 Room Tax Revenue	Gross FY 2008 Restaurant Tax Revenue	Gross FY 2008 Total Tax Revenues
Aberdeen	1.0	1.0	\$8,149	\$63,904	\$72,053
Baldwyn	None	2.0	None	117,874	117,874
Batesville	3.0	3.0	143,196	776,643	919,839
Bay Springs	3.0	None	6,904	None	6,904
Canton	2.0	2.0	87,186	420,857	508,043
Cleveland	2.0	2.0	63,071	543,899	606,970
Clinton	2.0	None	105,749	None	105,749
Coahoma County	2.0	1.0	70,705	240,291	310,996
Columbus-Lowndes	2.0	2.0	265,099	1,280,607	1,545,706
Corinth	2.0	2.0	16,002	929,963	945,965
DeSoto County	2.0	2.0	861,254	4,478,416	5,339,670
Florence	None	2.0	None	142,486	142,486
Flowood	None	2.0	None	1,404,916	1,404,916
Greenwood	1.0	1.0	85,917	329,898	415,815
Grenada	2.0	1.0	81,398	303,617	385,015
Hancock County	2.0	None	154,052	None	154,052
Harrison County	5.0	None	6,378,701	None	6,378,701
Hattiesburg	2.0	2.0	555,176	4,023,399	4,578,575
Hernando	1.0	None	24,447	None	24,447
Holly Springs	2.0	2.0	31,141	196,505	227,646
Horn Lake	1.5	None	113,565	None	113,565
Indianola	2.0	2.0	31,993	272,480	304,473

Jackson (city)	4.0	2.0	2,714,503	5,059,540	7,774,043
Kosciusko	2.0	None	28,356	None	28,356
Lauderdale County	2.5	None	566,882	None	566,882
Laurel	2.0	2.0	134,274	1,030,822	1,165,096
Magee	1.0	1.0	18,211	170,369	188,580
McComb	3.0	None	157,534	None	157,534
Montgomery County	2.0	None	16,723	None	16,723
Moss Point	3.0	None	488,296	None	488,296
Natchez#	3.0 plus \$2	1.5	379,568	640,415	1,019,98
New Albany	2.0	2.0	39,679	420,214	459,893
Newton	\$1/room night	None	12,122	None	12,122
Ocean Springs*	2.0	2.0	49,881	353,784	403,665
Oxford	2.0	2.0	191,751	1,606,372	1,798,123
Pascagoula	3.0	None	157,100	None	157,100
Pearl	None	2.0	None	560,245	560,24
Philadelphia	3.0	None	104,504	None	104,504
Picayune	2.0	1.0	64,219	368,608	432,827
Pontotoc	2.0	2.0	7,269	253,138	260,407
Rankin County	2.0	None	636,805	None	636,805
Richland	None	2.0	None	305,107	305,107
Ridgeland	1.0	1.0	219,109	945,060	1,164,169
Southaven	1.0	None	197,972	None	197,972
Starkville	2.0	2.0	157,638	1,189,691	1,347,329
Stone County	2.0	2.0	25,413	298,474	323,887
Tishomingo County	2.0	None	17,737	None	17,737
Tunica County	3.0	3.0	770,891	1,777,824	2,548,715
Tupelo	2.0	2.0	309,728	2,786,825	3,096,553
Vicksburg	3.0	1.0	721,710	763,246	1,484,956
Washington County	1.0	1.0	88,692	501,080	589,772
West Point	1.0	1.0	21,501	197,151	218,652
Yazoo County	2.0	2.0	35,948	283,742	319,690
Total			\$17,417,721	\$35,037,462	\$52,455,183

NOTE: Tourism Office 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.

* Ocean Springs began collecting their local Restaurant Taxes in February 2008.

SOURCE: Mississippi State Tax Commission, 2008.

Tourism Capital Investment (TCI) FY 2008 Surveys

MDA/Tourism Division's Research Unit, with input from MDA/Regional Services and Asset Development Division, City and County Building/Permit Departments, Tourism Offices, Chambers of Commerce, McGraw-Hill Construction/Dodge, state agencies, updated the FY 2008 TCI data. Appendices E/F include the county level FY 2007/2008 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 nor dollars spent over a multi-year period. They do reflect estimated contract construction costs and permit fees, but not land acquisition costs, site prep, casino or business equipment purchasing costs, condo "flipping," furniture & fixtures, etc. Some entities don't provide, nor make TCI data available. TCI is a "net" Tourism figure, or estimated cost portion.

Total estimated statewide TCI in FY 2007 was \$895.6 million, based on data secured, and \$687.6 million in FY 2008, or \$208 million less—a 23.2% decrease. Some \$528.5 million, or 76.9% of the FY 2008 TCI, was from private sources. The other \$159 million, or 23.1%, were public monies, from federal, state, county and city sources. State-licensed casinos, plus their amenities, accounted for \$282.6 million in FY 2008 TCI, or 41.1% of the total TCI.

The Mississippi Gulf Coast accounted for \$372.3 million in FY 2008 TCI, or 54.2% of the state's total. Condos, museums, casinos, retail establishments, infrastructure and many others comprised this TCI. Harrison County FY 2008 TCI of \$359.1 million was 52.2% of the state's total TCI, the same proportion as in FY 2007. Jackson County TCI included work at a Welcome Center, restaurants, retail. Hancock County had State Park and infrastructure projects.

Tunica County's \$45 million in FY 2008 TCI comprised casino development, road and highway work and airport infrastructure. Greenville/Washington County reflected \$6.4 million for FY 2008 projects such as a casino, infrastructure and retail. Sunflower County/Indianola's \$3.1 million in TCI was the B.B. Museum and Delta Interpretive Center project/infrastructure. Cleveland/Bolivar County had some \$893,200 in TCI, for restaurants and other projects.

The Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) FY 2008 TCI was \$95.7 million, or 14% of the \$687.6 million. Hotel/motel projects, retail establishments, infrastructure projects (airport/others) and a Convention Center were in the mix.

The Hattiesburg area (Forrest/Lamar counties) reflected \$12.6 million in FY 2008 TCI. FY 2008 examples included numerous restaurant and retail projects, hotel/motel construction and expansion efforts, state park renovations, downtown projects and other initiatives.

Tupelo's \$15.9 million for FY 2008 TCI covered retail, their regional airport, museums, sports facilities, restaurants and hotels. DeSoto County's \$14 million in FY 2008 TCI comprised new hotels/motels, retail, new restaurants and expansion/renovation of others, plus infrastructure. Oxford plus some Lafayette County non-city TCI was about \$12.5 million for retail buildout, expansion of the university's baseball stadium, infrastructure and other projects. Tishomingo County's \$2.4 million in FY 2008 TCI had municipal/state park projects, expansion of an RV business, marina development and other recreation projects. Corinth's \$1 million in TCI comprised retail, restaurants, special trails, infrastructure, among others.

Meridian/Lauderdale County's \$16 million in FY 2008 TCI covered airport infrastructure, a new hotel, new restaurants, other infrastructure, historic site improvements, among other efforts. Philadelphia/Neshoba County had nearly \$3 million in TCI, from parks to infrastructure.

Vicksburg's \$49.8 million in FY 2008 TCI pertained to a new casino project, renovations to casinos and amenities, a number of new hotels/motels, restaurants, retail and infrastructure. Natchez reported \$8.6 million in FY 2008—a new hotel, casino-related renovations, plus some restaurant improvements, road maintenance/infrastructure. Pike County's \$4 million in TCI featured a new hotel, golf course/state park improvements and infrastructure.

Starkville/Oktober County's \$3.5 million in TCI covered infrastructure and a new hotel. Pearl River County's \$1.3 million in TCI-related projects included convenience stores, infrastructure, stadium renovations, etc.

FY 2009 TCI—expected to decline—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 Tourism businesses in Mississippi's 82 counties. Private, public, nonprofit and quasi-public firms directly and indirectly affected by Tourism are represented in this study in terms of categories, number of employees and other characteristics.

Limitations

This study should be interpreted only for Mississippi. The study may be limited by the challenges of providing a comprehensive and local view of Tourism spending. 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 State Tax Commission's Petroleum Tax Division provides disbursements for the Hancock, Harrison and Jackson County Seawall Tax. This facilitates revenue figures for these three counties based on the net taxable gallons sold.

This study makes use of statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. The IMPLAN 2007 data intersect, but are not identical with, the FY 2008 tourist/visitor data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties, cities and municipalities. Limitations at the city/county level include the difficulty in assigning percent figures in terms of tourists/visitor sales, e.g., a city/county whose restaurant sales to tourists/visitors comprise 24% of these sales, or another city/county where the corresponding figure is 16% of this total.

Glossary

- Balance of Tourism Trade:** Tourism Exports minus Tourism Imports, taking leakage into account.
- Comped rooms:** Lodging arrangement where the occupied room is not paid for by the guest.
- Concentration Rank:** 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) 2008:** July 2007 - June 2008.
- General Fund:** Tourism's contribution to Mississippi's General Fund includes a portion of these revenues related to 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 Tourism-related projects, or projects with some 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 contributions 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.
- 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 Tourism Economic Contribution Model:** This model estimates Tourism employment, payroll, expenditures, General Fund revenues, TCI and Total Value Added. In Mississippi, it reflects 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 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 Ad Effectiveness/Visitor Profile Study respondents were required to have traveled for leisure in the past 12 months.

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 Tourism Accounts: A system that encompasses Tourism's Broader View. It focuses on the circular flow of goods and services in the economy between Tourism Industry Supply and the impact of Tourism Commodity Demand within a state.

Sub-Sectors/Industry Groups: Three-to-six digit categories—311 Food Manufacturing under 31 Manufacturing and 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 put, the contribution of an industry or sector to GDP or GSP.

Total Value Added to Expenditures: A ratio which measures how much of each Tourist Dollar spent, including Tourism Capital Investment, remains in the state.

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

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.

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

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

Tourism GSP: The Total Value Added of Tourism's composite nature expressed as its overall contribution to GSP. In other words, Tourism's Total Value Added/GSP. Tourism's ranking, within the state's economy, should be limited to GSP and Employment.

Tourism Imports: Expenditures by Mississippi residents outside the state.

Tourism Industry: Assembling/use of NAICS codes to estimate Tourism's statewide contribution in terms of direct employment, annual payroll for direct jobs, Tourist/Visitor expenditures, state and city/county tax revenues, Tourism's contribution to the General Fund, among other indicators, e.g., county level direct Tourism Employment and Tourist/Visitor expenditures.

Tourist/Visitor: Person/Travel Party making a 100-mile or more round trip (less for overnights) from in-state or out-of-state households, to enjoy the history, scenery and attractions of another community. Includes in-state/out-of-state overnight leisure, day leisure, day or overnight business, group travelers, International visitors, and combined business/leisure travel segments.

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Chambers of Commerce, Convention and Visitor Bureaus, Development Partnerships, Tourism Commissions and other city/county officials throughout the state.

Coahoma County. Daniel Vassel, County Administrator.

Greenville, City of. Steve Osso, Chief Financial Officer.

Hancock County. Sissy Gonzales, Comptroller; Reba McCaleb.

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.

Mid-Delta Regional Airport. Lane Rodgers, Director.

Tunica County Airport. Cliff Nash, Executive Director.

Tupelo Municipal Airport. Margot Ganaway, Executive Assistant.

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

Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department. Mary Willoughby, Bureau Director II.

Mississippi Department of Marine Resources. Tom Doster, Office Director, Administrative Services.

Mississippi Department of Wildlife, Fisheries and Parks (MDWFP). Jason Thompson, License Division; Ramie Ford, Director, and Sue Powers, Park Operations. Robbie Neely, Planning Division. Libby Hartfield, Director, and Dee Gardner, Mississippi Museum of Natural Science.

MDA/Energy Division. Janis Hill, Associate Manager, Grants Program. MDA/Asset Development/Regional Services Division. Joy Foy, Director, and Regional Offices.

Mississippi Gaming Commission (MGC). Larry Gregory, Executive Director; Monica M. Barnes, Operations Analyst; Patsy Knowles, Staff Officer.

Mississippi Gulf Coast CVB. Janice Jones, Media Relations Manager; Nicole Learson, Director of Marketing.

Mississippi State Tax Commission (MSTC). Jennifer Wentworth, Director of Accounting; Keian Grayer, Auditor/Accountant; Jerrod Pitts, Accountant; George Higdon, Director, Petroleum Tax.

Natchez Trace Parkway. Janet Battle, Human Resources Specialist.

Tunica County. Linda Humber.

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

Washington County. Elizabeth Smith, County Administrator.

Tourism Capital Investments:

Biloxi, City of. Edward Shambra, Executive Planner, Community Development.

Bolivar County. Nancy J. Havens, County Assessor–Collector; Tasha Lewis.

Brandon, City of. Amanda Tolstad, Director, Community Development.

Canton, City of. Donald Lawrence, Director, Building & Development.

Carthage, City of. William L. Russell, City Inspector.

Cleveland, City of. Brett Moorman, Director of Public Works.

Clinton, City of. Tammie Roberson, Community Development.

Copiah County Economic Development District.

Corinth Area CVB. Kristy White, Executive Director.

Flowood, City of. Dianne Woodard, Building & Permit Department.

Gautier, City of. Anthony Matheny, Director; Babs Hackett, Administrative Assistant, Planning Department.

Greenville, City of. Carlon Williams, Planning Department.

Grenada, City of. Fred Johnston, Planning & Zoning Department.
Harrison County Code Administration. Theresa Hydrick, Kelly Henderson.
Hattiesburg CVB/Visitors Center. Kristen Brock.
Holly Springs CVB. Stephanie Movre, Executive Director.
Horn Lake, City of. Brenda Cook, Planning Department.
Jackson, City of. Department of Economic Development and Planning/Code Services. Nina Holbrook,
Director; Kim Lewis; Gloria A. May.
Kosciusko, City of. DeWitt Adcock,
Long Beach, City of. Billy Skellie, Jr., Mayor; Veronica Howard, Permit Clerk.
Louisville, City of. Kenneth R. Morris, City Engineer.
Louisville-Winston County Chamber, Linda Skelton, Executive Director.
McGraw-Hill Construction/Dodge. Shawn LaRoche, Economic Analyst.
Magee, City of. Jimmy Clyde, Mayor.
Marshall County Zoning Office. Conway Moore.
Meridian, City of. Don Jemison, Planning Manager, Community Development.
MAC. Larry Morrissey, Director of Grants and Special Initiatives.
Mississippi DFA. Bama S. Strong, Systems Analyst.
Mississippi Department of Transportation (MDOT). John Vance, P.E., State Maintenance Engineer; Allyson A.
Johnson, Staff Officer I.
Mississippi IHL, Center for Policy Research and Planning. Dr. Bob Neal, Sr. Economist, Forecast and Analysis.
Montgomery County. Velma Young, Tax Assessor and Collector.
Ocean Springs, City of. Theresa Dobbs; Marie Starr, Deputy Tax Collector.
Oxford, City of. Mary Allyn Roulhac.
Panola Partnership. Meredith C. Fleming, Economic Development Assistant.
Pass Christian, City of. Gene Peralta, Building Official.
Pearl, City of. Lorraine Knight, Building Permit Specialist.
Pearl River Basin Development District. Paul Collins, Park Administrator, Sr.
Pearl River Valley Water Supply District. Amber Samuels.
Poplarville, City of. Linda DuPont, Building Permits Official.
Rankin County. Roy Edwards, Director; Judy Bolls, Building Department.
Richland, City of. Ann Grantham, Public Works/Community Development.
Ridgeland, City of. Alan Hart, Director, Community Development; Karen Knight.
Southaven, City of. Jean Vowell, Building/Permit Department.
Stone County. Charlotte A. Koestler, Executive Director, Stone County EDP.
Tishomingo County Development Foundation. Gary Matthews, ED Director.
Tupelo, City of. Marilyn Vail, Permit/Planning Department.
Tupelo CVB. Pat Rasberry, Assistant Director.
Vicksburg, City of. Marcia Weaver, Special Projects Director.
West Point, City of. Mike St. Louis.
Yazoo City, City of. Obie McClure.

U.S. Army Corps of Engineers. Lawran Richter, Outdoor Recreation Planner, Vicksburg Headquarters. Ralph Antonelli,
Park Manager, Columbus Office.

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

Brice's Crossroads National Battlefield Site. Edwina Carpenter, Curator.

Natchez National Historical Park. Melissa Tynes, Division Chief.

Natchez Trace Parkway. Janet Battle, Manager, Human Resources Office.

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

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

MDA/Tourism Division, Research Unit. Thomas E. Van Hyning, Research Program Manager, Linda C. Elliott,
Associate Manager.

Appendix A
ESTIMATED TOURISM EMPLOYMENT
FY 2007 AND FY 2008

CATEGORY	FY 2007	FY 2008	CHANGE
Food Services & Drinking Places (1)	24,533	25,262	3.0%
Lodging (2)	10,800	10,700	-0.9%
Gaming (3)	30,100	30,250	0.5%
Retail Trade (4)	8,245	8,235	-0.1%
Support Activities, Air Transportation (5)	1,494	1,567	4.9%
Air Passenger, Scheduled & Chartered (5)	273	292	7.0%
Scenic & Sightseeing Transportation	47	52	10.6%
Charter Bus Industry	111	109	-1.8%
Taxi Service	30	32	6.7%
Sub-Total, Transportation	1,955	2,052	5.0%
Travel Arrangement/Reservations	361	357	-1.1%
Passenger Car Rental	198	183	-7.6%
Parking Lots & Garages	18	16	-11.1%
Advertising & Related Services	179	193	7.8%
Laundry Services	147	151	2.7%
Sub-Total, Other Services	903	900	-0.3%
Motion Picture Theaters	176	168	-4.5%
Motion Picture & Video Production	70	100	42.9%
Museums, Historical Sights & Similar	193	219	13.5%
Recreational Activities (6)	1,432	1,736	21.2%
Performing Arts, Spectator Sports & Related	220	246	11.8%
Sub-Total, Private/Public Entertainment/Recreation	2,091	2,469	18.1%
State, City, County Tourism Offices and Agencies (7)	373	432	15.8%
Construction	6,300	4,700	-25.4%
TOTAL	85,300	85,000	-0.4%

Appendix A (continued)

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 Mississippi Gaming Commission quarterly survey and 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. The Mississippi Department of Wildlife, Fisheries & Parks--Parks Unit--are included--as well as Museums/ Historical Sites; Golf Courses; Outdoor Recreation--Marinas, private entities, some state/federal; and Amusement Parks & Arcades. Includes Outfitters, Guides, among other employment for FY 2008. This category is reflected in Appendices B and C. FY 2008 featured an MDA/Tourism Division Outdoor Recreation Survey. The U.S. Army Corps of Engineers Columbus and Vicksburg Districts are included; ditto for the Natchez Trace Parkway, Vicksburg Military Park, Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site.
7. Includes the staff at Mississippi's 12 Welcome Centers, MDA/Tourism Division, local Tourism Offices, in addition to some other State Agencies--the Mississippi Arts Commission, the Mississippi Gaming Commission, Pearl River Basin Development District, the Pearl River Water Supply District, the Mississippi Department of Marine Resources. The latter entity participated for the first time in FY 2008.

SOURCES: Mississippi Arts Commission, 2008.
Mississippi Department of Marine Resources, 2008.
Mississippi Department of Wildlife, Fisheries & Parks (MDWFP), 2008.
MDA/Tourism Division, 2008.
Mississippi Gaming Commission, 2008.
Mississippi Museum of Natural Science, 2008 (under MDWFP).
Mississippi State Tax Commission, 2008.
Pearl River Basin Development District, 2008.
Pearl River Water Supply District, 2008.

Appendix B
ESTIMATED TOURISM PAYROLL, FY 2007 AND FY 2008

CATEGORY	FY 2007 PAYROLL	FY 2008 PAYROLL
Food Services & Drinking Places	\$267,541,414	\$287,512,565
Lodging (1)	\$119,223,461	\$127,235,056
Gaming (2)	\$789,034,615	\$848,434,980
Retail Trade (3)	\$141,961,258	\$140,070,371
Support Activities, Air Transportation	60,283,689	66,021,706
Air Passenger, Scheduled & Chartered	9,313,234	8,974,379
Scenic & Sightseeing Transportation	763,278	905,921
Charter Bus Industry	2,139,238	2,268,068
Taxi Service	944,126	581,534
Sub-Total, Transportation	\$73,443,565	\$78,751,608
Travel Arrangement/Reservations	8,797,409	9,186,056
Passenger Car Rental	4,810,426	4,162,540
Parking Lots & Garages	259,252	231,208
Advertising & Related Services	6,112,327	7,464,722
Laundry Services	2,638,788	2,722,858
Sub-Total, Other Services	22,618,202	23,767,384
Motion Picture Theaters	1,503,378	1,413,764
Motion Picture & Video Production	1,751,678	2,259,756
Museums, Historical Sights & Similar	5,303,939	6,251,784
Recreational Activities (4)	35,209,179	38,460,790
Performing Arts, Spectator Sports & Related	4,799,378	5,695,089
Sub-Total, Public/Private Recreation Related	\$48,567,552	\$54,081,183
State, City, County Tourism Offices/Agencies (5)	14,009,138	16,141,293
Construction	\$247,600,795	\$164,237,076
Total	\$1,724,000,000	\$1,740,231,516

Appendix B (continued)

THIS APPENDIX INCLUDES:

1. Does not include the payroll of employees at state-licensed casino hotels or the Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos plus the employees at state-licensed casino hotels. Data do not reflect the estimated payroll of casino and hotel employees at the Pearl River Resort.
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; Prerecorded Tape, Compact Disc and Record Stores.
4. Includes some government jobs; Museums/Historical Sites; Golf Courses; Outdoor Recreation including Marinas, private entities, some state/federal; and Amusement Parks & Arcades. Includes Outfitters, Guides, among other employment for FY 2008. This category is included in Appendices B and C. FY 2008 featured an MDA/Tourism Division Outdoor Recreation Survey. The U.S. Army Corps of Engineers Columbus and Vicksburg Districts are included; ditto for the Natchez Trace Parkway, Vicksburg Military Park, Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site.
5. Includes the staff at Mississippi's 12 Welcome Centers, MDA/Tourism Division, local Tourism Offices, in addition to some other State Agencies—the Mississippi Arts Commission, the Mississippi Gaming Commission, Pearl River Basin Development District, the Pearl River Water Supply District, the Mississippi Department of Marine Resources. The latter entity participated for the first time in FY 2008.

SOURCES: Mississippi Arts Commission, 2008.
Mississippi Department of Employment Security, LMI Department, 2008.
Mississippi Department of Marine Resources, 2008.
Mississippi Department of Wildlife, Fisheries & Parks (MDWFP), 2008.
MDA/Tourism Division, 2008.
Mississippi Gaming Commission, 2008.
Mississippi Museum of Natural Science, 2008 (under MDWFP).
Mississippi State Tax Commission, 2008.
Pearl River Basin Development District, 2008.
Pearl River Water Supply District, 2008.

Appendix C
ESTIMATED TOURISM EXPENDITURES BY VISITORS, FY 2007 AND FY 2008

CATEGORY	FY2007	FY2008	CHANGE
Restaurants	\$869,465,827	\$918,982,665	5.7%
Quick-Stop, Specialty Food & Grocery Stores	486,706,413	523,650,322	7.6%
Concessions Quick Food	70,624,582	71,323,900	1.0%
Bar & Beer Parlors	46,814,281	56,211,150	20.1%
Lodging	520,606,662	591,457,678	13.6%
Gaming (1)	2,007,094,014	2,035,315,603	1.4%
Department & General Merchandise (NEC)	785,865,092	726,017,169	-7.6%
Apparel & Accessories	47,384,147	46,296,791	-2.3%
Miscellaneous Retail (NEC)	75,932,543	74,571,655	-1.8%
Gift, Novelty & Souvenir	74,674,192	73,825,977	-1.1%
Sporting Goods, Bicycle & Music/Book Stores	41,615,423	41,038,288	-1.4%
Camera & Photographic Stores	11,241,975	11,378,798	1.2%
Antique & Secondhand Stores	11,514,581	12,168,461	5.7%
Cigar Stores & Stands & Drug Stores	28,077,884	30,686,275	9.3%
Gaming Related Gift/Novelty (2)	74,429,856	95,139,884	27.8%
Gasoline at 18 cents (3)	335,445,929	415,183,122	23.8%
Gasoline Service Stations	29,335,698	29,461,263	0.4%
Diesel Fuel at 18 cents (3)	42,809,281	57,177,218	33.6%
Fixed Facilities, Air Transportation (4)	36,026,004	42,816,071	18.8%
Rental & Leasing, Transportation	21,325,403	20,483,318	-3.9%
Auto Repair Shops & Accessories	32,794,826	32,733,526	-0.2%
Water Passenger Transportation	57,031	125,052	119.3%
Entertainment/Recreation (5)	67,835,139	76,846,077	13.3%
Licensing Fees—Nonresident only (6)	8,357,566	9,108,240	9.0%
Advertising Specialties (7)	1,773,100	1,617,483	-8.8%
Printing & Publishing (7)	2,299,969	2,299,476	none
Laundries, Dry Cleaning	6,855,106	6,842,521	-0.2%
Total	\$5,736,962,524	\$6,002,757,983	4.6%

Appendix C (continued)

THIS APPENDIX INCLUDES:

1. Net Tourist/Visitor Gross Gaming Revenues for 28 state-licensed casinos in FY 2007; and 29 in FY 2008.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA self Service Unleaded Gas Price Averages.
4. Air Transportation, Air Terminal, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY 2007 and FY 2008, based on scheduled/charter passenger service and Passenger Facility Charges.
5. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; 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.
6. Only the nonresident licensing portions were computed from the Mississippi Departments of Marine Resources; and MDWFP Licensing Section.
7. A significant portion is not tourists/visitors.

SOURCES: American Automobile Association Web Site, 2008.
Brice's Crossroads National Battlefield Site, Natchez National Historical Park, Shiloh National Military Park/Corinth.
Mississippi Department of Marine Resources, 2008.
Mississippi Department of Wildlife, Fisheries & Parks (MDWFP), 2008.
MDA/Energy Division, 2008.
MDA/Tourism Division, 2008.
Mississippi Gaming Commission, 2008.
Mississippi State Tax Commission, 2008.
U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2008.
U.S. Department of the Interior, National Park Service:
Vicksburg National Military Park, 2008.

Appendix D
ESTIMATED TOURISM GENERAL FUND, REVENUES, FY 2007 AND FY 2008

CATEGORY	FY 2007	FY 2008	CHANGE
Restaurants	\$36,488,851	\$38,580,833	5.7%
Quick-Stop, Specialty Food & Grocery Stores	20,427,699	21,992,737	7.7%
Concessions Quick Food	2,965,014	2,995,706	1.0%
Bar & Beer Parlors	1,964,639	2,360,870	20.2%
Lodging	21,851,929	24,826,579	13.6%
Gaming (1)	132,694,698	139,200,000	4.9%
Department & General Merchandise (NEC)	33,032,460	30,466,886	-7.8%
Apparel & Accessories	1,988,282	1,943,951	-2.2%
Miscellaneous Retail (NEC)	2,958,632	2,945,745	-0.4%
Gift, Novelty & Souvenir	3,133,535	3,097,958	-1.1%
Sporting Goods, Bicycle & Music/Book Stores	1,748,342	1,721,632	-1.5%
Camera & Photographic Stores	469,261	474,394	1.1%
Antique & Secondhand Stores	479,575	501,736	4.6%
Cigar Stores & Stands & Drug Stores	1,179,405	1,288,825	9.3%
Gaming Related Gift/Novelty (2)	2,962,946	3,815,876	28.8%
Gasoline Service Stations	1,229,515	1,229,812	none
Rental & Leasing, Transportation	607,161	561,702	-7.5%
Auto Repair Shops & Accessories	1,363,922	1,359,329	-0.3%
Water Passenger Transportation	2,382	5,252	120.5%
Entertainment/Recreation (3)	2,611,501	3,024,826	15.8%
Advertising Specialties	73,483	67,921	-7.6%
Printing & Publishing	95,170	95,022	-0.2%
Laundries, Dry Cleaning	289,248	287,089	-0.7%
Construction Activity Tax (4)	18,780,559	14,645,054	-22.0%
Personal Income/Sales Tax (5)	91,018,278	92,591,830	1.7%
Total	\$380,416,487	\$390,081,565	2.5%

Appendix D (continued)

THIS APPENDIX INCLUDES:

1. Approximately \$139.2 million, or 71.8% of the \$194 million in General Fund Gaming Fees and Tax Transfers, were the "Net" Tourism Portion. The other \$54.8 million, or 28.2%, were not attributed to Tourism.
2. Estimated Tourism-related sales at the various retail shops.
3. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; 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.
4. The estimated Tourism-related portion of the General Fund based on TCI.
5. The estimated Tourism-related portion of the General Fund amount, based on estimated effective tax rates for Personal Income, Sales Tax and all other Taxes.

SOURCES: Mississippi Department of Employment Security, LMI Department, 2008.
MDA/Energy Division, 2008.
MDA/Tourism Division, 2008.
Mississippi IHL, Center for Policy Research and Planning.
Mississippi State Tax Commission, 2008.

Appendix E
ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2007

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Adams	90,419,577	2,200	17.3	\$8,086,779	\$16,089,602
Alcorn	41,526,124	705	5.0	3,916,212	167,501
Amite	1,719,371	20	0.9	145,854	3,699
Attala	15,740,743	290	5.4	1,212,019	244,838
Benton	826,277	10	0.8	78,988	3,699
Bolivar	26,866,888	500	4.2	2,524,348	372,303
Calhoun	2,776,797	30	0.9	217,824	342,750
Carroll	882,001	14	1.2	85,738	476,123
Chickasaw	5,034,572	80	1.2	376,300	3,699
Choctaw	1,020,424	13	0.7	91,915	5,199
Claiborne	2,047,848	32	0.9	190,113	468,120
Clarke	3,186,502	57	2.0	273,698	69,353
Clay	13,127,372	210	3.2	1,202,476	1,019,865
Coahoma	57,378,872	1,035	11.7	5,987,449	48,427
Copiah	6,844,847	120	1.5	507,997	1,061,272
Covington	5,212,777	73	1.4	387,884	NA
DeSoto	209,502,418	3,400	7.4	20,013,767	30,235,131
Forrest ^	227,542,650	4,000	6.9	20,553,058	61,334,422
Franklin	1,105,871	16	0.9	99,024	94,299
George	7,758,945	105	2.3	566,563	193,482
Greene	1,370,152	14	0.7	118,103	108,434
Grenada	34,173,929	655	5.9	2,833,210	86,286
Hancock	115,241,091	1,890	15.1	12,444,122	44,093,530
Harrison	1,342,950,816	22,000	24.7	144,672,800	467,266,933
Hinds	323,444,959	6,370	4.5	30,347,597	60,287,678
Holmes	3,829,181	52	1.1	292,446	263,667
Humphreys	2,326,450	22	0.8	182,226	37,500
Issaquena	106,787	2	1	9,377	NA
Itawamba	8,615,892	136	2.1	664,243	21,637
Jackson	126,215,877	1,840	3.7	11,614,793	46,353,143
Jasper	3,135,028	45	1.1	248,499	3,699
Jefferson	844,273	10	0.9	81,695	5,248
Jefferson Davis	2,484,797	30	1.5	195,724	NA
Jones	47,804,966	700	2.1	4,624,146	640,116
Kemper	1,409,082	20	1.0	125,258	81,451

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Lafayette	77,289,936	1,425	7.1	7,289,384	13,767,442
Lamar ^					^
Lauderdale	117,353,732	1,915	5.0	8,887,237	15,968,000
Lawrence	2,602,433	32	1.2	204,472	47,981
Leake	8,517,541	93	1.7	620,524	995
Lee	226,830,481	3,655	6.8	18,912,368	15,059,906
Leflore	43,426,401	725	4.6	3,517,004	871,800
Lincoln	19,592,434	265	2.1	1,427,720	60,526
Lowndes	103,635,298	1,525	5.6	8,807,057	1,332,617
Madison	148,789,546	2,020	4.4	12,085,974	16,069,213
Marion	10,093,113	125	1.6	783,242	24,497
Marshall	10,883,228	175	2.6	1,034,243	237,461
Monroe	15,900,629	240	2.2	1,257,591	528,072
Montgomery	6,388,916	65	2.4	519,865	349,978
Neshoba #	28,414,144	405	NA	2,179,170	2,628,347
Newton	5,734,623	75	1.2	442,148	3,699
Noxubee	3,871,866	42	1.3	333,515	NA
Oktibbeha	55,498,561	960	4.6	5,296,940	1,764,065
Panola	20,185,032	290	2.5	2,293,797	77,625
Pearl River	20,069,190	245	2.4	1,871,558	1,583,357
Perry	1,995,056	24	0.9	162,976	45,136
Pike	30,595,815	480	2.9	2,320,441	1,113,719
Pontotoc	7,064,943	78	0.6	657,931	307,246
Prentiss	6,559,768	82	1.0	482,577	3,735
Quitman	1,262,308	13	0.8	109,960	NA
Rankin	137,609,255	2,555	4.3	12,553,641	20,002,288
Scott	16,791,114	200	1.7	1,219,935	440,772
Sharkey	1,179,595	12	1.1	103,742	NA
Simpson	11,351,312	150	1.9	1,031,250	1,628,750
Smith	1,802,869	17	0.5	150,569	3,699
Stone	7,066,255	87	2.0	817,811	22,304
Sunflower	10,889,949	166	1.5	1,107,610	3,277,875
Tallahatchie	1,773,294	25	0.9	154,601	NA
Tate	9,895,149	175	3.0	749,878	7,777
Tippah	6,606,101	85	1.1	514,915	90,568
Tishomingo	10,096,800	166	2.7	786,100	1,339,885
Tunica	1,143,963,396	13,800	91.7	132,288,586	29,048,453

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Union	11,915,070	190	2.1	1,347,104	NA
Walthall	2,350,681	34	1.1	186,466	15,307
Warren	213,451,203	4,200	17.0	21,519,045	15,923,019
Washington	59,917,726	1,260	6.4	5,524,133	18,772,735
Wayne	7,654,510	85	1.5	555,855	1,302,030
Webster	2,038,167	22	1.0	164,364	38,500
Wilkinson	2,070,870	25	1.3	168,421	73,884
Winston	13,350,581	225	4.1	1,009,284	238,665
Yalobusha	2,413,607	31	1.0	207,013	5,366
Yazoo	9,320,515	140	2.4	1,026,319	17,759
Total	5,390,537,169	85,300	7.4	\$539,656,581	\$895,578,159

Appendix E does not include estimated Gasoline Sales for 79 Mississippi Counties, Diesel Fuel Sales, or Non-Resident Licensing Fees. It includes estimated Net Tourist/Visitor State-Licensed Casino Gaming Revenues for these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Ditto for Tourism Expenditures by visitors.

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 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 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 taxes; city-county state-licensed casino gaming tax revenues; Room/Restaurant special Taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control (ABC) county level share of permit license fees; and available TCI local level permit fees.

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management, Mississippi Department of Employment Security, LMI, MDOT, MDWFP; Mississippi State Tax and Mississippi Gaming Commissions; McGraw Hill Construction/ Dodge; and many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2007.

Appendix F
ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2008

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Adams	85,762,711	2,000	15.1	\$7,843,136	\$8,552,745
Alcorn	40,104,323	700	4.9	3,850,136	1,004,651
Amite	1,868,144	20	1.0	156,245	47,234
Attala	16,280,793	300	5.4	1,247,734	199,471
Benton	801,833	10	0.8	77,283	6,550
Bolivar	27,011,340	500	3.9	2,595,314	893,221
Calhoun	2,915,499	32	1.0	228,015	8,129
Carroll	1,004,946	15	1.0	94,467	15,210
Chickasaw	4,970,929	80	1.3	371,710	53,450
Choctaw	1,052,996	14	0.7	95,316	9,260
Claiborne	2,657,295	40	1.1	217,973	586,106
Clarke	3,603,859	60	2.0	310,456	35,942
Clay	13,881,478	215	3.3	1,289,960	1,223,385
Coahoma	53,203,900	910	10.5	5,560,527	596,040
Copiah	7,685,991	125	1.5	566,849	480,482
Covington	6,198,235	80	1.5	456,880	1,698,038
DeSoto	223,495,412	3,250	6.4	21,491,323	14,000,658
Forrest ^	234,102,231	4,000	6.8	21,178,139	12,559,339
Franklin	931,026	14	0.7	88,020	39,873
George	8,785,622	110	2.3	638,637	127,240
Greene	1,286,295	13	0.6	114,875	24,262
Grenada	35,500,933	675	6.1	2,970,761	1,091,419
Hancock	167,036,611	1,930	14.3	18,145,379	4,010,057
Harrison	1,452,426,414	22,300	24.1	154,308,916	359,133,425
Hinds	338,165,580	6,550	4.6	31,743,568	47,984,599
Holmes	4,087,861	50	1.1	306,352	64,318
Humphreys	2,348,398	23	0.8	185,057	6,650
Issaquena	81,308	2	0.9	7,761	6,791
Itawamba	8,765,810	136	2.1	670,951	209,063
Jackson	139,690,292	1,860	3.5	13,046,207	9,134,028
Jasper	3,282,050	45	1.0	259,358	28,353
Jefferson	857,930	10	0.9	82,706	26,239
Jefferson Davis	2,800,975	32	1.5	216,924	4,000
Jones	48,078,771	710	2.1	4,606,020	1,191,890
Kemper	1,431,349	20	1.1	125,694	89,012

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Lafayette	82,822,582	1,435	6.9	7,775,158	12,486,218
Lamar ^					^
Lauderdale	124,732,216	1,900	4.8	9,339,808	16,001,815
Lawrence	2,826,427	33	1.2	219,632	79,921
Leake	8,477,094	91	1.8	618,352	114,470
Lee	227,213,857	3,655	6.9	19,183,187	15,896,442
Leflore	44,571,245	730	4.5	3,629,791	3,449,112
Lincoln	19,799,365	265	2.1	1,450,214	82,065
Lowndes	98,259,594	1,500	5.4	8,497,632	4,625,851
Madison	161,292,027	2,100	4.5	13,380,845	29,397,633
Marion	9,596,148	120	1.5	748,068	39,214
Marshall	10,925,814	180	2.6	1,064,829	240,433
Monroe	15,958,031	240	2.2	1,264,358	79,996
Montgomery	6,472,759	65	2.4	525,213	244,803
Neshoba #	28,639,427	405	NA	2,199,121	2,997,688
Newton	5,611,719	75	1.1	455,387	27,403
Noxubee	4,498,489	45	1.4	376,916	43,781
Oktibbeha	59,373,176	1,000	4.8	5,620,693	3,549,755
Panola	22,999,939	315	2.6	2,599,597	2,018,308
Pearl River	20,980,119	250	2.2	1,889,072	1,325,455
Perry	2,074,819	25	1.0	169,803	12,257
Pike	30,431,267	478	2.9	2,357,505	4,036,386
Pontotoc	7,239,951	80	0.7	793,682	267,003
Prentiss	5,752,219	76	0.9	424,054	254,561
Quitman	1,216,695	13	0.8	106,763	4,950
Rankin	139,969,964	2,550	4.3	13,335,354	14,356,545
Scott	17,209,142	202	1.7	1,268,753	40,822
Sharkey	1,195,262	12	1.0	104,841	5,352
Simpson	12,457,871	160	2.0	1,129,465	3,502,689
Smith	1,982,581	18	0.5	161,684	57,278
Stone	6,938,585	90	2.0	829,814	353,921
Sunflower	11,051,937	170	1.6	1,140,960	3,076,780
Tallahatchie	1,820,386	25	0.9	152,570	5,744
Tate	9,576,363	165	2.8	729,229	76,284
Tippah	7,746,852	91	1.3	594,734	121,857
Tishomingo	10,986,630	180	3.0	848,256	2,417,756
Tunica	1,069,488,182	13,000	87.8	125,574,397	43,322,178

County	Tourism Expenditures by Visitors	Direct Tourism Employment	Tourism Employment Percentage*	State and Local Taxes Attributed to Tourism**	Tourism Capital Investment
Union	12,110,028	190	2.1	1,362,265	334,523
Walthall	2,515,767	35	1.1	197,923	23,189
Warren	208,821,811	4,160	17.2	21,450,006	49,779,430
Washington	77,961,914	1,500	7.5	7,639,864	6,439,498
Wayne	7,686,238	87	1.5	560,108	313,610
Webster	2,158,169	22	1.0	172,729	5,630
Wilkinson	2,167,460	26	1.4	175,547	34,166
Winston	14,398,243	240	4.4	1,084,832	741,381
Yalobusha	2,354,469	30	1.0	205,648	54,195
Yazoo	9,412,961	140	2.3	1,054,186	76,832
Total	5,573,934,934	85,000	7.4	\$559,611,494	\$687,556,310

Appendix F does not include estimated Gasoline Sales for 79 Mississippi Counties, Diesel Fuel Sales, or Non-Resident Licensing Fees, or the Tourism portion of Petroleum Tax dollars diverted to the Departments of Wildlife Conservation and Marine Resources. It includes estimated Net Tourist/Visitor State-Licensed Casino Gaming Revenues for these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Ditto for Tourism Expenditures by visitors.

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 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 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 taxes; city-county state-licensed casino gaming tax revenues; Room/Restaurant special Taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control (ABC) county level share of permit license fees; and available TCI local level permit fees.

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management, Mississippi Department of Employment Security, LMI, MDOT, MDWFP; Mississippi State Tax and Mississippi Gaming Commissions; McGraw Hill Construction/Dodge; and many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2008.

Appendix G
ESTIMATED HOTEL/MOTEL ROOM COUNT, FY 2007/FY 2008

County	Hotel/Motel Rooms (6-30-07)	Hotel/Motel Rooms (6-30-08)	Percentage Change
Adams	1,065	989	-7.1%
Alcorn	291	415	42.6%
Amite	14	14	none
Attala	123	131	6.5%
Benton	0	0	NA
Bolivar	460	460	none
Calhoun	24	24	none
Carroll	0	12	NA
Chickasaw	62	62	none
Choctaw	20	14	-30.0%
Claiborne	44	44	none
Clarke	20	20	none
Clay	157	157	none
Coahoma	885	885	none
Copiah	144	145	0.7%
Covington	93	93	none
DeSoto	2,054	2,500	21.7%
Forrest*	2,421	2,550	5.3%
Franklin	7	7	none
George	151	151	none
Greene	9	0	NA
Grenada	796	757	-4.9%
Hancock	661	831	25.7%
Harrison	7,650	9,000	17.6%
Hinds	5,461	5,467	0.1%
Holmes	66	54	-18.2%
Humphreys	52	52	none
Issaquena	0	0	NA
Itawamba	62	62	none
Jackson	2,502	2,592	3.6%
Jasper	26	26	none
Jefferson	0	0	NA
Jefferson Davis	40	67	67.5%
Jones	563	656	16.5%
Kemper	35	26	-25.7%

County	Hotel/Motel Rooms (6-30-07)	Hotel/Motel Rooms (6-30-08)	Percentage Change
Lafayette	664	661	-0.5%
Lamar*			
Lauderdale	1,742	1,642	-5.7%
Lawrence	30	30	none
Leake	56	56	none
Lee	1,812	1,867	3.0%
Leflore	731	760	4.0%
Lincoln	451	402	-10.9%
Lowndes	832	856	2.9%
Madison	1,656	1,785	7.8%
Marion	120	120	none
Marshall	210	225	7.1%
Monroe	153	153	none
Montgomery	165	139	-15.8%
Neshoba	1,420	1,542	8.6%
Newton	95	103	8.4%
Noxubee	64	64	none
Oktibbeha	707	707	none
Panola	428	416	-2.8%
Pearl River	170	134	-21.2%
Perry	0	19	NA
Pike	451	685	51.9%
Pontotoc	56	56	none
Prentiss	100	100	none
Quitman	0	0	NA
Rankin	1,650	1,782	8.0%
Scott	233	233	none
Sharkey	0	19	NA
Simpson	110	129	17.3%
Smith	0	33	NA
Stone	93	93	none
Sunflower	235	235	none
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	82	82	none
Tishomingo	151	130	-13.9%
Tunica	6,348	6,300	-0.8%

County	Hotel/Motel Rooms (6-30-07)	Hotel/Motel Rooms (6-30-08)	Percentage Change
Union	248	200	-19.4
Walthall	30	30	none
Warren	1,896	1,765	-6.9%
Washington	1,291	1,230	-4.7%
Wayne	136	150	10.3%
Webster	10	10	none
Wilkinson	0	0	NA
Winston	213	213	none
Yalobusha	20	30	50.0%
Yazoo	139	139	none
Total	51,087	53,719	5.2%

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2008 and January 2009, 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 2007 and FY 2008 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, 2008.

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: MDA/Tourism Division, 2008.

NOTES