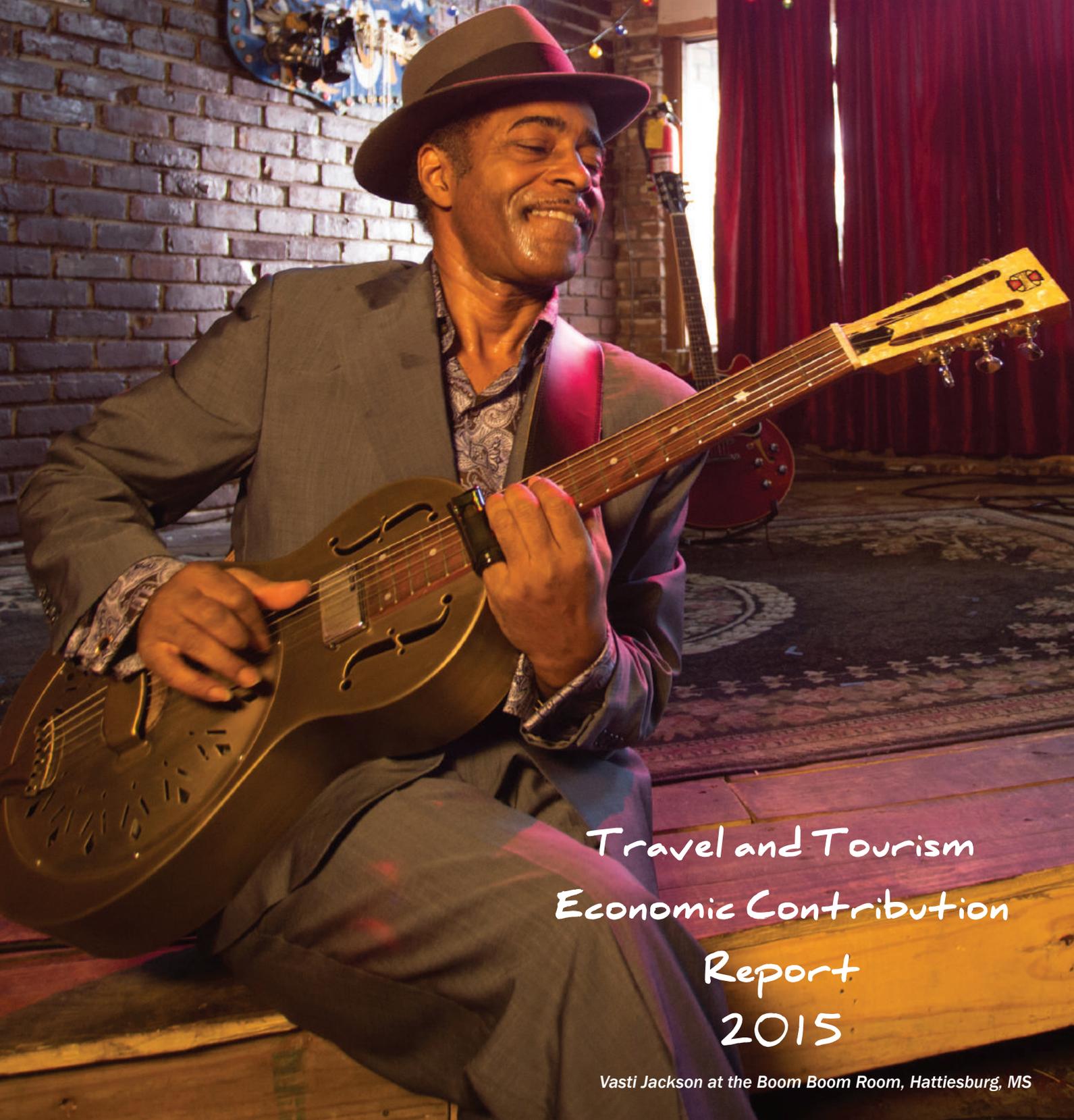


# VISIT MISSISSIPPI



Travel and Tourism  
Economic Contribution  
Report  
2015

Vasti Jackson at the Boom Boom Room, Hattiesburg, MS

2015 Economic Contribution  
of  
Travel and Tourism  
in Mississippi  
March 2016

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# Table of Contents

	Page
INTRODUCTION .....	5
METHODS .....	6
FINDINGS .....	6
TRANSPORTATION .....	7
Welcome Center registration data .....	7
Welcome Center reservation service .....	7
Regional airport/air passenger data .....	7
Motor coach snapshot .....	8
Amtrak .....	8
GAMING .....	10
Gaming revenues .....	10
Mississippi Gaming Commission Quarterly Survey trends .....	10
Gaming employment .....	11
Nongaming summary of revenue for state-licensed casinos .....	11
OUTDOOR RECREATION/GOLF .....	12
THE BROADER VIEW AND ECONOMIC DEVELOPMENT .....	14
State Gross Domestic Product, total value added and state-level travel and tourism accounts .....	14
Travel and tourism employment multipliers (indirect and induced) .....	14
Travel and tourism labor income multipliers (indirect and induced) .....	14
Travel and tourism exports and imports .....	14
Estimated effective tax rates .....	15
Employment rankings and trends .....	15
A consistent producer .....	15
CITY/COUNTY AND OTHER STATE LEVEL INDICATORS .....	18
County travel and tourism expenditures/employment and hotel/motel room data .....	18
City/county tax revenues and fees attributed to travel and tourism .....	18
Travel and Tourism Office advertising and employment/payroll mini-surveys, FY2015 .....	18
STATEWIDE TRAVEL AND TOURISM LINKS .....	18
Film productions, documentaries and commercials (CY2015) .....	18
Selected state agencies with travel and tourism links: FY2015 operations mini-surveys .....	19
Visit Mississippi Visitor Profile Study, FY2015 .....	20
Visit Mississippi Ad Effectiveness Study, FY2015 .....	20
American Express Traveler Study, FY2015 .....	21
Canadian overnight travel to Mississippi statistics, CY2014 .....	21
Tourism capital investment (TCI) FY2015 Surveys (October 2014 – September 2015) .....	26
Delimitations .....	26

Limitations .....	26
Glossary .....	27-28
Acknowledgments .....	29-31

## APPENDICES

A Estimated travel and tourism direct employment, FY2014 and FY2015 .....	33-34
B Estimated travel and tourism direct payroll, FY2014 and FY2015 .....	35-36
C Estimated travel and tourism expenditures by visitors, FY2014 and FY2015 .....	37
D Estimated travel and tourism General Fund revenues, FY2014 and FY2015 .....	38
E Estimated county travel and tourism expenditures, employment, taxes, TCI, FY2014 .....	39-41
F Estimated county travel and tourism expenditures, employment, taxes, TCI, 2015 .....	42-44
G Estimated hotel/motel room count, CY2014/CY2015 .....	45-47
H Mississippi's five tourism regions .....	48

## TABLES

1 Origin of highway Welcome Center registrants by U.S. and International travelers, FY2014 and FY2015 .....	8
2 Highway Welcome Center registrants, Top 10 states, FY2014 .....	8
3 Highway Welcome Center registrants, Top 10 states, FY2015 .....	9
4 Highway Welcome Center registrants, Top 10 countries, FY2014 .....	9
5 Highway Welcome Center registrants, Top 10 countries, FY2015 .....	10
6 Gross gaming revenue market share by region, FY2014 and FY2015 .....	11
7 Gross gaming revenue percentage change by region, FY2014 and FY2015 .....	11
8 Selected casino hotel lodging indicators by region, FY2014 .....	12
9 Selected casino hotel lodging indicators by region, FY2015 .....	12
10 State park visitation, FY2014/FY2015 .....	13
11 Mississippi nonfarm establishment-based employment rankings, direct jobs, top sectors, FY2015 .....	16
12 Travel industry employment ranking: 50 states and D.C. ....	17
13 Room/restaurant gross special tax revenues by Tourism Office, FY2014 .....	22
14 Room/restaurant gross special tax revenues by Tourism Office, FY2015 .....	24

# INTRODUCTION

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

Travel and tourism's visibility in Mississippi is at an all-time high. Fifty-eight local entities with a travel and tourism component were in place as of March 2016. They comprise chambers of commerce, convention and visitor bureaus (CVBs), tourism councils, economic development offices, commissions, cities, counties and city/county partnerships.

U.S. travel and tourism had \$928 billion in direct domestic plus international expenditures, with 8 million direct jobs, 7 million indirect and induced jobs, \$221.7 billion in payroll income from direct jobs, and \$141.5 billion in combined federal, state and local tax revenues, according to the U.S. Travel Association Calendar Year 2014 data. Tourism's value added as a share of U.S. Gross Domestic Product (GDP) was 2.71 percent, according to a 2013 Bureau of Economic Analysis report. The U.S. travel industry generated a \$42.2 billion trade surplus in 2014, with \$137 billion spent abroad by U.S. travelers combined with \$179.2 billion spent in the U.S. by international visitors.

This report estimates travel and tourism's Fiscal Year 2015 economic contribution at the state and county level for Mississippi. Travel and tourism is vital to Mississippi's economy and economic development engine, based on these estimates. Travel and tourism accounted for 85,135 direct jobs in FY2015, versus 84,225 in FY2014, an increase of 1.1 percent. Travel and tourism comprised 7.6 percent of FY2015 total statewide establishment-based nonfarm employment. Some 83,115 of these FY2015 jobs, or 97.6 percent, were in the private sector.

Other key findings in this report include:

- Travel and tourism had 32,550 indirect and induced jobs in FY2015. Travel and tourism total employment – direct, indirect and induced – was 117,685, or 10.5 percent of statewide employment.
- Travel and tourism ranked fourth in FY2015 direct private-sector employment, for all sectors.
- FY2015 travel and tourism annual payroll for direct jobs was \$1.84 billion – \$8.8 million or 0.5 percent less than in FY2014. FY2015 indirect and induced labor income was \$950 million. Total FY2015 labor income – direct payroll, indirect and induced – was \$2.79 billion.
- Travel and tourism is one of Mississippi's largest export industries and a major contributor to the state's financial affairs and quality of life. If 85,135 direct statewide travel and tourism jobs were eliminated in December 2015, and all else remained equal, the state's unemployment rate would have more than doubled from 6.5 percent to 13.2 percent.
- Without travel and tourism, there would have been \$388.7 million less in General Fund revenues, 117,685 fewer total jobs (direct, indirect and induced), \$2.79 billion less in total annual payroll associated with this industry and a decrease in the state's overall quality of life, assuming other industries remained constant.
- Travel and tourism expenditures by visitors totaled \$6.17 billion in FY2015, a 1.3-percent increase versus \$6.09 billion in FY2014.
- Travel and tourism's proportion of Mississippi's FY2015 General Fund – \$388.7 million of \$5.4 billion – was 7.2 percent, or \$1 of every \$14. The \$388.7 million was a 0.2-percent increase versus \$388 million in FY2014 travel and tourism General Fund revenues.
- FY2015 Tourism Capital Investment (TCI) – new/renovated contract construction costs – was \$299.3 million, a 1.9-percent decrease versus FY2014.
- FY2015 state and local (city-county) travel and tourism state taxes and fees collected added up to \$626.1 million, a 1-percent increase versus the \$619.9 million estimate in FY2014.
- FY2015 combined state and local taxes/fees collected of \$626.1 million translated to \$561 per household in state (\$403) and local (\$158) tax relief.
- Of the \$250.2 million in combined state and local gaming tax revenues in FY2015, travel and tourism accounted for \$171 million, or 68.3 percent.
- Statewide hotel/motel rooms increased from 57,006 on December 31, 2014, to 58,305 on December 31, 2015, or +2.3 percent. Hotels/motels totaled 683 on December 31, 2015. It is projected the state will have between a 1.2- and 2.4-percent increase in hotel/motel room inventory in CY2016 compared to CY2015, a range of 695-to-1,385 additional hotel/motel rooms.
- Mississippi's estimated 22.33 million total visitors in FY2015, a 1.5-percent increase from a year earlier, included mostly domestic visitors, the sum of overnight leisure, leisure day-trip, overnight/day business travelers, combined business/leisure travelers and other personal business, pass-through and group tour visitors.
- About 67 percent of all domestic visitors overnights in the state; 33 percent did day-trips.
- Sixty-seven percent of the FY2015 visitors to Mississippi were from out-of-state, or "travel and tourism exports." They spent "new" dollars in Mississippi for goods and services.

- Eighty-five percent of FY2015 domestic overnight leisure visitors came from eight states: Mississippi (33 percent), Louisiana (14 percent), Alabama (9 percent), Tennessee (8 percent), Florida (7 percent), Texas (7 percent), Georgia (4 percent) and Arkansas (3 percent).
- About 77.8 percent of all FY2015 household travel party expenditures were from out-of-state.
- Travel and tourism's estimated direct, or "value added," portion of the state Gross Domestic Product (GDP) was 2.6 percent in FY2015.
- The number of people served at Welcome Centers in FY2015 totaled 2,492,290, or flat versus 2,507,172 in FY2014.
- In FY2015, 13 Mississippi counties had more than \$120 million in travel and tourism expenditures by visitors. In addition, 19 Mississippi counties had more than 1,000 direct FY2015 travel and tourism jobs.

Estimated FY2015 travel and tourism direct sales, General Fund tourism revenues, state tax revenues, city/county travel and tourism tax revenues cited on Pages 4-5 include dollars from in-state/out-of-state Mississippi tourists/visitors and some pass-through travelers.

## **METHODS**

The purpose of this report was to estimate travel and tourism's FY2015 statewide economic contribution in terms of state Gross Domestic Product (GDP) and total value added, jobs (direct, indirect and induced), payroll (labor income), sales (expenditures), capital investment and state tax revenue – including the General Fund portion – plus local level (city/county) indicators. County indicators include estimated travel and tourism jobs (direct only), expenditures and capital investment. Room/restaurant tax revenues are presented, as part of state/local taxes for each county attributed to travel and tourism.

Other trends – for example, visitor profile/special survey data, Welcome Center highlights and airport passenger data – are covered. The profile and airport data are secured via surveys. Surveys are also secured for federal entities with an October-to-September fiscal year: Vicksburg Military Park, Natchez National Historical Park, Bay Springs Site, Columbus Office, Vicksburg headquarters-U.S. Army Corps of Engineers, Shiloh National Military Park/Corinth Site and Mississippi Final Stands Interpretive Center. Most of Mississippi's convention and visitor bureaus are on an October-September fiscal year, but the Department of Revenue compiles tax revenue information on a monthly and state fiscal year basis. The Department of Revenue provided most of the statewide and county revenue figures. They facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation and attractions/entertainment/recreation information electronically.

Mississippi Gaming Commission quarterly surveys supply lodging variables in the state-licensed casino hotels, advertising expenditures, and capital investment. Other state agencies surveyed with a travel and tourism connection include the Mississippi Arts Commission; the Mississippi Department of Archives and History; the Department of Wildlife, Fisheries & Parks, the Mississippi Museum of Natural Science and the Pearl River Water Supply District.

FY2015 employment and payroll data were primarily calculated from quarterly figures compiled by the Mississippi Department of Employment Security, Labor Market Information Department. Prior outdoor recreation surveys resulted in jobs/payroll data for a cross-section of outfitters and hunting/fishing guides. Other state and federal agencies, as well as local tourism offices and museums, furnished employment/payroll data via specific surveys.

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

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

Travel and tourism's broader view and economic development are on pages 14-17. The focus is on GDP, total value added, state-level travel and tourism accounts, employment and labor income multipliers, travel and tourism exports and imports, estimated effective tax rates, and employment rankings within the state.

## **FINDINGS**

Food services and drinking places, gaming (state-licensed) and lodging jobs were the top three in direct travel and tourism employment, in Mississippi, based on Appendix A. The 22,237 state-licensed casino gaming jobs, including casino hotels, equaled 26.1

percent of 85,135 direct travel and tourism employment. All other 62,898 direct travel and tourism jobs were 73.9 percent of these 85,135 direct jobs. Food services and drinking places reflected a net gain of 500 full-time equivalent jobs, or 55 percent of the total net gain of 910 full-time equivalent jobs, versus FY2014. Direct lodging jobs increased by 135, or 14.8 percent of this net job gain.

Appendix A comprises travel and tourism direct employment breakdown by category for FY2014 and FY2015. The narrative section on Page 14 summarizes data on indirect and induced jobs. Appendix B shows FY2014 and FY2015 payroll-related information by employment component. The indirect and induced labor income multipliers are presented on Page 14.

Estimated travel and tourism expenditures by visitors totaled \$6.09 billion in FY2014, compared to \$6.17 billion in FY2015, per Appendix C. FY2014/FY2015 estimated General Fund revenues are Appendix D – \$388 million in FY2014; \$388.7 million in FY2015. Travel and tourism's \$388.7 million slice of the FY2015 General Fund was 7.2 percent, via visitor expenditures, tourism capital investment, travel and tourism personal income, sales taxes and other taxes.

Appendices E and F, respectively, show estimated FY2014/FY2015 county level travel and tourism expenditures by visitors, direct travel and tourism employment, travel and tourism employment percentage, state and local sales taxes attributed to travel and tourism, and TCI data. Appendix G presents FY2014 and FY2015 statewide and countywide hotel/motel room data. Appendix H is a county breakdown for the state's five tourism regions: the Capital/River Region, the Coastal Region, the Delta Region, the Hills Region and the Pines Region.

## TRANSPORTATION

Highway Welcome Center statistics for FY2015, regional airport data gathered October 2014 through September 2015, a motor coach snapshot and Amtrak data are highlighted.

### Welcome Center Registration Data

Travel party registrants provide Welcome Centers with trip-related data. Registrants are asked to provide their zip code, age range of party, number of visitors in their party and the reason for their visit. Of the 2,492,290 people serviced at Welcome Centers in FY2015, 2,021,113 – or 81.1 percent – registered. Most Welcome Center registrants were U.S. residents. FY2015 international travelers comprised 68,857, or 3.4 percent of registrants. This proportion was 3.2 percent in FY2014 based on 65,084 international registrants.

U.S. registrants showed no change with 1,952,726 in FY2014 and 1,952,256 in FY2015. The international segment increased by 5.8 percent; and total registrants increased 0.2 percent, per Table 1. Mississippi, Louisiana, Alabama, Texas, Florida and Georgia held the top six spots in FY2015, per Table 3. Canada had the most international registrants – 30.7 percent in FY2014; 30.2 percent in FY2015, per Tables 4 and 5.

### Welcome Center Reservation Service

The Welcome Center reservation service enables travel counselors to make reservations for travelers/visitors in any hotel/motel, bed and breakfast, or campground accepting those reservations. This reservation service completed its 21st year of operation in June 2015 with \$87,667 in revenue, 880 reservations and 1,064 room nights booked.

### Regional Airport/Air Passenger Data

Mississippi's regional/international airports reported 818,897 scheduled revenue passengers from October 2014 to September 2015, a 10-percent decrease versus 909,740 FY2014 revenue passengers. Data for several airports were based on calendar year 2014 data. Regional airports, plus Tunica County's airport, had 78,181 total revenue charter flight enplanements in FY2015, a 10.2-percent decrease compared to FY2014 charter flight enplanements. Most (95.7 percent) charter flight enplanements pertained to Gulfport-Biloxi and the Tunica County Airport.

The Jackson-Medgar Wiley Evers International Airport enplaned 497,587 revenue passengers, or 60.8 percent, of all FY2015 passengers enplaned in Mississippi. Its 28 daily nonstop flights to cities and airports included Atlanta, Charlotte, Chicago, Dallas-Ft. Worth, Houston, and Washington, D.C. Jackson-Evers reported \$6.3 million in capital improvement projects in FY2015. This airport is a vital cog for the state's air traffic activity.

Gulfport-Biloxi International Airport had 262,748 paid scheduled service enplanements in FY2015. Their four carriers are American Airlines, Delta, Sun Country and United. Cities served by the end of FY2015 include Atlanta, Charlotte, Dallas-Ft. Worth and Houston. Gulfport-Biloxi's International Airport cited \$15.3 million in FY2015 capital expenditures and improvements. In FY2015, Gulfport-Biloxi had 665 charter flights and 64,933 revenue passenger enplanements with many cities. Hattiesburg-Laurel had 38 flights, 2,113 passengers.

Tunica County's airport had 148 charter flight departures and 12,469 enplanements in FY2015, with 65 U.S. cities, including Atlanta, Austin, Detroit, Jacksonville and Tulsa. An estimated \$2 million in FY2015 net capital expenditures and improvements were made to the airport.

### Motor Coach Snapshot

The American Bus Association Foundation released a 2014 study of motor coach group tourism in the U.S., including Mississippi data. John Dunham and Associates, New York, estimated Mississippi had 1.08 million motor coach group tourists on day-trips plus 526,900 on overnight stays, for an estimated total of 1.6 million. These travelers may have spent \$419.4 million in Mississippi, per this research. This spending could support 5,391 direct jobs.

### Amtrak

Amtrak serves Mississippi with two long-distance trains: the City of New Orleans, with daily Chicago-New Orleans service via Jackson and the Crescent, with daily New Orleans-Atlanta-New York service via Meridian. Ten Mississippi stations with Amtrak include Brookhaven, Greenwood, Hattiesburg, Hazlehurst, Jackson, Laurel, McComb, Meridian, Picayune and Yazoo City. Total FY2015 ridership in Mississippi was 107,109, down 2.2 percent from 109,487 in FY2014. The FY2015 total U.S. Amtrak ridership was 30.8 million, or 0.1 percent below the 30.9 million in FY2014. Ridership is the sum of total of passengers boarding and disembarking.

## Table 1

Origin of Highway Welcome Center Registrants by U.S. and International  
FY2014 and FY2015

Origin	FY2014 Registrants	FY2015 Registrants	Percentage Change
States	1,952,726	1,952,256	None
Countries	65,084	68,857	5.8%
Total	2,017,810	2,021,113	0.2%

NOTE: Tables 1-5 only reflect those visitors who completed the registration forms.

SOURCE: Visit Mississippi, 2015.

## Table 2

Highway Welcome Center Registrants, Top 10 States  
FY2014

State	Registrants	Percentage of States	Percentage of Top Ten
Mississippi	326,789	16.7%	20.8%
Louisiana	304,685	15.6%	19.4%
Alabama	198,073	10.1%	12.6%
Texas	194,196	9.9%	12.3%
Florida	138,426	7.1%	8.8%
Georgia	115,017	5.9%	7.3%
Tennessee	108,539	5.6%	6.9%
Arkansas	78,193	4.0%	5.0%
Missouri	63,302	3.2%	4.0%
Illinois	46,775	2.4%	3.0%
Other	378,731	19.4%	NA
Total	1,952,726	100.0%	100.0%

SOURCE: Visit Mississippi, 2014.

**Table 3**  
 Highway Welcome Center Registrants, Top 10 States  
 FY2015

State	Registrants	Percentage of States	Percentage of Top Ten
Mississippi	338,459	17.3%	21.6%
Louisiana	288,785	14.8%	18.4%
Alabama	195,635	10.0%	12.5%
Texas	186,913	9.6%	11.9%
Florida	136,334	7.0%	8.7%
Georgia	116,736	6.0%	7.4%
Tennessee	112,606	5.8%	7.2%
Arkansas	77,047	3.9%	4.9%
Missouri	64,737	3.3%	4.1%
Illinois	49,799	2.6%	3.2%
Other	385,205	19.7%	NA
Total	1,952,256	100.0%	100.0%

SOURCE: Visit Mississippi, 2015.

**Table 4**  
 Highway Welcome Center Registrants, Top 10 Countries  
 FY2014

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	20,006	30.7%	37.7%
Germany	8,216	12.6%	15.5%
England	7,959	12.2%	15.0%
Australia	4,912	7.5%	9.3%
France	3,659	5.6%	6.9%
Mexico	3,265	5.0%	6.2%
Holland	2,136	3.3%	4.0%
Switzerland	1,100	1.7%	2.1%
Norway	935	1.4%	1.8%
Sweden	832	1.3%	1.6%
Other	12,064	18.5%	NA
Total	65,084	100.0%	100.0%

SOURCE: Visit Mississippi, 2014.

**Table 5**  
Highway Welcome Center Registrants, Top 10 Countries  
FY2015

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	20,797	30.2%	36.5%
England	9,090	13.2%	16.0%
Germany	8,815	12.8%	15.5%
Australia	5,602	8.1%	9.8%
France	4,803	7.0%	8.4%
Holland	2,393	3.5%	4.2%
Mexico	2,226	3.2%	3.9%
Switzerland	1,232	1.8%	2.2%
Belgium	1,022	1.5%	1.8%
Sweden	977	1.4%	1.7%
Other	11,900	17.3%	NA
Total	68,857	100.0%	100.0%

SOURCE: Visit Mississippi, 2015.

## **GAMING**

Mississippi had 28 state-licensed casinos on February 1, 2016, including 12 on the Mississippi Gulf Coast; nine in the Northern Region (Tunica and Coahoma County); seven in the Central Region (Greenville, Washington County, Natchez and Vicksburg).

### **Gaming Revenues**

Total FY2015 state-licensed casino gross gaming revenues were \$2.09 billion, with \$1.43 billion, or 68.5 percent, as the estimated net traveler/visitor share. This \$1.43 billion was 23.2 percent of the \$6.17 billion in statewide travel and tourism expenditures.

Mississippi's gaming tax revenues totaled \$250.2 million in FY2015, including \$167.3 million in state receipts and \$82.9 million for cities/counties. Travel and tourism accounted for an estimated \$114 million of \$167.3 million of the state receipts and \$57 million of \$82.9 million of the city/county receipts. Of the \$250.2 million in combined state and local gaming tax revenues, travel and tourism accounted for \$171 million, or 68.3 percent. Of \$167.3 million in state tax receipts, \$131.3 million, or 78.5 percent, went into the General Fund; \$36 million, 21.5 percent, was appropriated to the Mississippi Department of Transportation. Travel and tourism's portion of \$131.3 million in General Fund gaming dollars was \$89.9 million, or 68.5 percent. The \$89.9 million accounts for 23.1 percent of travel and tourism's \$388.7 million contribution to the General Fund.

FY2014/2015 state-licensed casino gross gaming revenue market share by gaming region –Northern, Central and Coastal – comprise Table 6. Table 7 includes the percentage change in gross gaming revenue by regions between FY2014/2015.

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

Some 64.1 percent of all FY2015 statewide patrons were from out-of-state, primarily Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per MGC data. Coahoma and Tunica County casinos in the Northern Region had 77.4 percent of out-of-state patrons, due to Arkansas, Tennessee, Illinois, Missouri, Oklahoma and Alabama visitors. About 25.6 percent of the Central Region – Greenville, Natchez and Vicksburg – casino patrons came from out-of-state, e.g., Arkansas and Louisiana. Of the Coastal Region casino patrons, 68.2 percent lived out-of-state, e.g., Louisiana, Florida, Alabama, Georgia and Texas.

State-licensed casinos plus their hotels contributed an FY2015 payroll of \$658.2 million, down 5.6 percent from FY2014. FY2015 advertising and promotional expenditures attributed to state-licensed casinos were \$104.3 million, plus 1.2 percent versus FY2014. Casino hotel indicators, by three gaming regions, are in Tables 8/9. Casino hotel rooms in Tables 8/9 are based on FY2014/FY2015 quarterly averages. State-licensed casino hotel rooms increased from 10,948 as of December 31, 2014, to 11,608 as of December 31, 2015, or 6.0 percent. Hotel and Convention facilities hosted 1,429 conferences in FY2015 with 190,635 total delegates. Total FY2015 ticketed show/concert attendees was 278,567.

An estimated \$120.9 million in tourism capital investment (TCI) for casinos/amenities, or 40.4 percent of statewide TCI, were attributed to the state-licensed/other casino development in FY2015. These are investment dollars in addition to state-licensed casino employment, and they do not include land acquisition/gaming equipment, furniture & fixtures, or site prep.

**Gaming Employment**

FY2015 quarterly casino employment data came from Mississippi Department of Employment Security, Labor Market Information Department quarterly surveys. They reflected 22,237 total state-licensed casino employees and casino hotel employees, or 26.1 percent of statewide 85,135 direct travel and tourism jobs.

**Nongaming Summary of Revenue for State-Licensed Casinos**

Room revenue at state-licensed casino hotels was \$227.7 million in FY2015, or -3 percent versus FY2014, while food and beverage revenue totaled \$396.7 million, \$15.9 million less, -3.8 percent versus FY2014. FY2015 other nongaming revenue was \$106.5 million, or \$4.1 million below the \$110.6 million in FY2014, a 3.7-percent decrease. Dollar amounts are significant. Many lodging, food & beverage, other amenities/services are complimentary.

**Table 6**

Gross Gaming Revenue Market Share by Region  
FY2014 and FY2015

Region	FY2014 Gross Gaming Revenue	Percentage of FY2014 Total	FY2015 Gross Gaming Revenue	Percentage of FY2015 Total
Coastal	\$1,071,886,637	51.5%	\$1,079,318,036	51.8%
Northern	682,245,217	32.8%	675,420,899	32.4%
Central	326,879,485	15.7%	330,537,970	15.9%
Total	\$2,081,011,339	100.0%	\$2,085,276,905	100.0%

NOTE: Table 6 and Table 7 reflect Gaming Revenue Region shares. Coastal revenues are for cities in Hancock and Harrison counties. Northern revenue reflect Coahoma and Tunica County. Central revenues comprise cities in Adams, Warren and Washington counties. This is the case for Tables 6-9. The FY2014 and FY2015 data reflect July to June gross gaming revenue.

SOURCES: Mississippi Gaming Commission and the Department of Revenue, 2015.

**Table 7**

Gross Gaming Revenue Percentage Change by Region  
FY2014 and FY2015

Region	FY2014 Gross Gaming Revenue	FY2015 Gross Gaming Revenue	Percentage Change
Coastal	\$1,071,886,637	\$1,079,318,036	0.7%
Northern	682,245,217	675,420,899	-1.0%
Central	326,879,485	330,537,970	1.1%
Total	\$2,081,011,339	\$2,085,276,905	0.2%

SOURCES: Mississippi Gaming Commission and the Department of Revenue, 2015.

**Table 8**

Selected Casino Hotel Lodging Indicators by Region, FY2014

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	10	5,630	89.0%	\$73.14
Northern	12	5,897	66.5%	54.18
Central	7	712	68.9%	67.69
Quarterly Average	29	12,239	77.0%	\$64.97

NOTE: Table 8 figures reflect fiscal year quarterly averages. Three casino hotels closed in June 2014 in the Northern Region. A large portion of the casino hotel rooms are comped. Revenue per available room is complex to estimate.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, FY2014.

**Table 9**

Selected Casino Hotel Lodging Indicators by Region, FY2015

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	10	5,892	89.2%	\$73.77
Northern	9	4,432	67.5%	52.95
Central	7	712	64.9%	67.34
Quarterly Average	26	11,036	79.0%	\$65.07

NOTE: Table 9 figures reflect fiscal year quarterly averages. Figures do not include a casino hotel that opened on the coast, December 2015. A large portion of the casino hotel rooms are comped. Revenue per available room is complex to estimate.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, FY2015.

## **OUTDOOR RECREATION/GOLF**

Employment, payroll and revenue figures for the Department of Wildlife, Fisheries & Parks, U.S. Army Corps of Engineers, Vicksburg’s National Military Park, Natchez’s National Historical Park, Natchez Trace Parkway, Shiloh National Military Park/Corinth Site and Mississippi Final Stands Interpretive Center are in Appendices A-C. Per the Visit Mississippi’s Outdoor Recreation Marketing Program Manager, “The economic contribution of outdoor recreation is felt far and wide all across the state, and its participant pockets are deep.” Hunting, fishing and other wildlife-related activities entice visitors to many parts of Mississippi. These travel parties spend significant dollar amounts on food and lodging, transportation, other trip costs such as fuel, fishing and hunting equipment, auxiliary and special equipment.

Camping and RV travel are important to Mississippi’s travel and tourism economy. Mississippi had 13,653 RV spaces with electricity and water, and 1,781 camp sites without hook-up, per the 2015 County Room Inventory Survey. The Pearl River Valley Water Supply District (parts of Hinds, Leake, Madison and Rankin counties) reported 2.5 million visitors in FY2015. Mississippi’s State Parks have 1,673 camp sites (mostly hook-ups). Table 10 includes FY2014 and FY2015 state park visitation figures indicating an 8.5-percent increase in FY2015 visitation versus FY2014. The Department of Wildlife, Fisheries & Parks reported \$9.3 million in FY2015 non-resident licensing sales, or increase of 2.8 percent versus FY2014 from the 135,163 non-resident licenses issued in FY2015.

Visit Mississippi continues to be at the forefront of U.S. golf destinations specifically and the golf world at large thanks to many factors. These include:

- Aggressive, savvy marketing. The Memphis, New Orleans, Visit Mississippi campaign targeting Asia and the Visit Mississippi Buffalo Brand Invigoration Group’s golf tourism public relations, marketing and communications program generated a \$10 return for every \$1 invested by the state.
- PGA Tour and PGA Tour Champions events. The tournament weeks shine a national spotlight on the state and drive tens of millions in economic development dollars. Mississippi Golf attracts the best players in the world and readily appeals to golf travelers who stay longer and spend more than average travelers.
- Mossy Oak Golf Club’s scheduled opening in September 2016. Located in West Point and the sister course of Old Waverly, Mossy Oak was designed by Gil Hanse, golf course architect for the 2016 Rio de Janeiro Summer Olympics venue in Brazil. Mossy Oak-Old Waverly will present one of America’s best public-access combos and will drive substantial golf tourism, both as a course and a destination.

**Table 10**  
State Park Visitation, FY2014/FY2015

Park	FY2014 Visits	FY2015 Visits	Change
Buccaneer State Park	108,700	214,129	97.0%
Clark Creek	20,287	9,226	-54.5%
Clarkco	40,192	58,792	46.3%
George P. Cossar	25,144	28,076	11.7%
Golden Memorial	2,066	1,429	-30.8%
Holmes County	12,535	6,300	-49.7%
Hugh White	39,896	35,034	-12.2%
J.P. Coleman	52,733	47,930	-9.1%
John W. Kyle	53,633	49,587	-7.5%
Lake Lincoln	51,273	41,886	-18.3%
Lake Lowndes	41,704	41,691	None
LeFleur's Bluff	55,050	35,977	-34.6%
Legion	10,637	8,769	-17.6%
Leroy Percy	8,385	9,341	11.4%
Natchez	27,329	27,960	2.3%
Paul B. Johnson	93,632	111,439	19.0%
Percy Quin	82,474	97,779	18.6%
Roosevelt	86,661	90,991	5.0%
Shepard	0	0	NA
Tishomingo	55,717	55,697	None
Tombigbee	24,317	17,526	-27.9%
Trace	64,803	55,144	-14.9%
Wall Doxey	30,044	26,343	-12.3%
Total	987,212	1,071,046	8.5%

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2015.

## **THE BROADER VIEW AND ECONOMIC DEVELOPMENT**

Visit Mississippi's Research Program Manager has worked on the "broader view" project – estimate travel and tourism's portion of the broader state economy in gross domestic product, employment, General Fund revenues, construction activity, and other areas – since 2000. Mississippi's economy without travel and tourism, if other sectors stayed constant would yield \$388.7 million less in General Fund revenues, 117,685 fewer total jobs (direct, indirect and induced), \$2.79 billion less in total annual payroll associated with this industry and other quality-of-life issues. Most of the 85,135 direct and 32,550 secondary travel and tourism jobs cannot be outsourced. The state's CY2015 unemployment rate would more than double from 6.5 to 13.2 percent if all 85,135 direct travel and tourism jobs were eliminated, and all other sectors stayed constant.

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

The state gross domestic product – part of the national GDP – is a comprehensive measure of economic output used by all 50 states, D.C. and U.S. territories. Travel and tourism's share of GDP can be estimated via state-level travel and tourism accounts, a broader view system focusing on the circular flow of goods and services in the economy between tourism industry supply and the impact of tourism commodity demand. The University Research Center projected real GDP in Mississippi increased by 1 percent in 2015 versus 2014.

Visit Mississippi's research program estimates travel and tourism's statewide contribution – industry as a direct and total percentage of state GDP. Other indicators are the indirect and induced share of travel and tourism employment and labor income, leakage, effective tax rates for personal income tax, sales tax, other taxes, among other indicators.

The direct effects of total value added from Mississippi's statewide travel and tourism data were matched to their description in IMPLAN – a nationally recognized economic contribution model to estimate the economic activity associated with the sale of a good or service – for gasoline stations, lodging, food services and drinking places, and other codes to estimate its direct value added as a percentage of state total. Mississippi's GDP in current dollars was \$105 billion in FY2015, per the Bureau of Economic Analysis. Travel and tourism's 2.6 percent direct value added to GDP is lower than its 7.6 percent direct employment concentration and 7.2 percent share of General Fund revenues. Travel and tourism is a composite industry.

The direct portion only of food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation and transportation were part of the travel and tourism industry GDP. Casino gaming, food services and drinking places and lodging were a major portion of this industry GDP in FY2015. Its composite nature needs to be emphasized.

Mississippi's economy had a 6.5 percent unemployment rate based on a 12-month moving average, January-December 2015, versus 7.6 percent for January-December 2014. The civilian labor force was 1.27 million, with an average of 82,200 unemployed persons, CY2015. Metropolitan Statistical Areas for counties with major travel and tourism activity had these unemployment rates: 6.5 percent for Gulfport-Biloxi-Pascagoula (Hancock, Harrison and Jackson counties); 5.7 percent for Hattiesburg (Forrest, Lamar and Perry counties); 5.3 percent for Jackson (Copiah, Hinds, Madison, Rankin, Simpson and Yazoo). DeSoto County's CY2015 unemployment rate was 4.6 percent; Tunica County's unemployment rate was 10.4 percent.

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

IMPLAN includes indirect (business or firm level) and induced (personal or individual level) multipliers. Together – direct plus indirect plus induced, then divided by the direct contribution – they estimate employment multipliers filtered through a social accounting matrix. FY2014 and FY2015 employment multipliers for Mississippi were 1.36 and 1.38, respectively. The 84,225 estimated statewide direct FY2014 travel and tourism jobs resulted in an additional 29,942 indirect plus induced jobs. The 85,135 statewide FY2015 direct travel and tourism jobs resulted in an additional 32,550 indirect plus induced, or secondary, jobs. FY2015 jobs associated with travel and tourism totaled 117,685, or 10.5 percent of nonfarm employment. FY2015 employment multipliers varied – 1.43 for lodging, 1.23 for food services and drinking places.

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

Payroll or labor income earned by an employee results in additional money spent by the firm (indirect) and individual (induced). FY2014 travel and tourism labor income multiplier for Mississippi was 1.5. The total labor income for FY2014 was \$2.77 billion, made up of \$1.85 billion direct and \$928 million in indirect/induced income. Mississippi's FY2015 travel and tourism labor income multiplier was 1.52, with \$1.84 billion in direct and \$950 million in indirect/induced or secondary income, for a total labor income of \$2.79 billion. IMPLAN codes were used to compute these multipliers.

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

Travel and tourism is one of Mississippi's largest export industries, generating economic benefits across all parts of the state that directly affect the entire state. Mississippi's net balance of travel and tourism trade was positive, or a surplus, in FY2015. Net balance is defined as expenditures from out-of-state visitors in Mississippi minus travel and tourism expenditures out of Mississippi by in-state residents, minus money eventually leaving the state from out-of-state visitor spending surplus in Mississippi.

Out-of-state visitors spent an estimated \$4.8 billion in Mississippi, 77.8 percent of \$6.17 billion spent by visitors in FY2015.

Mississippians traveling within the state – 50 miles or more, one-way – spent an estimated \$1.37 billion on their in-state trips, or 22.2 percent of \$6.17 billion. Mississippians spent an estimated \$4 billion traveling out-of-state on business and leisure travel.

### Estimated Effective Tax Rates

The University Research Center, Mississippi public universities, estimates total additions to the General Fund, by tax bracket. Visit Mississippi estimates travel and tourism-related dollars from personal income taxes, sales taxes and all other taxes, which go to the General Fund. An estimated \$101.4 million in travel and tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY2015, minus 2.6 percent versus FY2014.

### Employment Rankings and Trends

Travel and tourism ranked 4th in total estimated private FY2015 direct nonfarm, establishment-based employment, behind manufacturing, retail trade, private health care and social assistance. Most of the direct FY2015 statewide travel and tourism jobs – 83,115 of 85,135, or 97.6 percent – were private sector ones, including hotels/motels, restaurants, casinos and retail. The other 2,020, or 2.4 percent, were held by employees in state parks, federal parks, outdoor recreation, airports, historic sites, state/local tourism offices, museums, performing arts centers and spectator sports sites.

Mississippi's 85,135 statewide direct travel and tourism jobs in FY2015 equaled 7.6 percent of all establishment-based nonfarm jobs, per Appendix F. The 84,225 statewide direct travel and tourism jobs in FY2014 were 7.5 percent of all jobs, per Appendix E. Nonfarm employment rankings reflect sectors, per their definition on Page 28. Table 11 is Mississippi's FY2015 nonfarm, establishment-based employment rankings by the top major industry "sectors." About 82.6 percent of Mississippi's nonfarm workers are employed in service-providing industries; the other 17.4 percent works in manufacturing, construction and natural resources/mining. Table 11 only ranks FY2015 nonfarm, private sector components. Table 12 compares Mississippi to other states in travel industry private sector employment ranking.

Mississippi's 85,135 direct travel and tourism jobs in FY2015, were the most in seven years but 165 fewer than the FY2007, pre-"Great Recession" number of 85,300. Direct travel and tourism jobs in Mississippi increased by 1.6 percent annually, on average, between FY1994 (64,035 direct jobs) and FY2015, with up-and-down economic cycles. The 85,135 direct travel and tourism jobs in FY2015 comprised 99.8 percent of the 85,300 pre-recession figure.

### A Consistent Producer

Travel and tourism industry is a "consistent producer" in Mississippi, helping state and local governments to close budget gaps and pay for much-needed services. This includes real and personal property taxes paid by hotels/motels, bed-and-breakfasts, restaurants and casinos; 18.5 percent of the 7 percent state sales tax allocated to the cities; motor vehicle rental taxes; petroleum taxes; among others cited at the end of Appendices E and F. Cities, counties and even schools benefit from property taxes paid by lodging, food & beverage and other businesses.

## Table 11

Mississippi Nonfarm Establishment-Based Employment Rankings, Direct Jobs, Top Sectors, FY2015

Sector	FY2015 Establishment Based Employment	FY2015 Employment Percentage	FY2015 Private Sector Rank
Manufacturing (1)	139,940	12.4%	1
Retail Trade (2)	126,140	11.2%	2
Health Care and Social Assistance--private (3)	124,425	11.2%	3
Travel and Tourism (4)	85,135	7.6%	4
Administrative Support and Waste Management	60,550	5.4%	5
Leisure Accommodation and Food Services (5)	59,930	5.3%	6
Construction (6)	44,925	4.0%	7
Transportation and Warehousing (7)	39,490	3.5%	8
Other Services (8)	38,105	3.4%	9
Wholesale Trade	34,940	3.1%	10
Finance and Insurance	32,215	2.9%	11
Professional, Scientific and Technical Services (9)	29,875	2.7%	12
Information (10)	12,815	1.1%	13
Education Services	11,885	1.1%	14
Real Estate and Rental (11)	10,940	1.0%	15
Management of Companies	10,640	0.9%	16
Mining and Logging	9,025	0.8%	17
Utilities	7,810	0.7%	18
Leisure Arts, Entertainment and Recreation (12)	1,900	0.2%	19
Government (13)	243,520	21.7%	NA
<b>Total Statewide Nonfarm Direct Employment</b>	<b>1,124,205</b>	<b>100.0%</b>	<b>NA</b>

1. Durable goods comprised 93,485 jobs, or 66.8 percent of manufacturing jobs.
2. Does not include an estimated 9,885 travel and tourism jobs directly related to retail trade.
3. Does not include any public sector health care jobs. Those are included under government.
4. Includes accommodations, food services, amusement, arts, entertainment, state-licensed casino gaming and recreation, transportation, tourism construction, among other jobs.  
A portion of these jobs are not directly related to travel and tourism, based on the definition of a traveler/visitor on page 28. Those jobs not directly related to travel and tourism are included in the accommodations and food services; arts, entertainment and recreation sectors. Appendix A includes the direct FY2015 statewide travel and tourism jobs. Travel and tourism: state's 4th largest private sector employer.
5. Reflects portion of employment not directly related to travel and tourism, e.g., food services and drinking places.
6. Excludes travel and tourism-related construction.
7. Excludes travel and tourism-related scheduled passenger and non-scheduled charter air transportation; interurban and rural bus transportation; taxi, limousine service, charter bus; scenic and sightseeing transportation; support activities for air transportation.
8. Excludes travel and tourism-related laundry services and parking lots and garages.
9. Excludes travel and tourism-related advertising and travel arrangement and reservation services.
10. Excludes motion picture and video production and motion picture theaters related to travel and tourism.
11. Excludes travel and tourism-related residential property managers and passenger car rental.
12. Includes non-travel and tourism employment, estimated portion attributed to locals.
13. Excludes an estimated 2,020 travel and tourism jobs funded by public monies--state tourism office staff, regional/international airports, museums, historical sights, performing arts, state parks, etc. Includes all public sector employment--health care, education--government is a super sector.

SOURCE: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2015.

## Table 12

Travel Industry Employment Ranking: 50 States and D.C.

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

NOTE: Rankings were based on the proportion of private sector travel jobs as a percentage of statewide totals (not on the absolute number of travel jobs). This is the travel and tourism employment divided by nonfarm establishment-based employment, or concentration rank.

SOURCE: Travel Impact on State Economies, U.S. Travel Association, 2015.

## **CITY/COUNTY AND OTHER STATE LEVEL INDICATORS**

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

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

FY2014/2015 travel and tourism expenditures by visitors, employment data for the 82 counties, travel and tourism employment percentage, state/local taxes attributed to travel and tourism and TCI are in Appendices E and F.

Mississippi had 683 total hotel/motel properties as of December 31, 2015, per a countywide lodging census conducted by Visit Mississippi, plus Smith Travel Research census data. Statewide hotel/motel rooms increased from 57,006 as of December 31, 2014, to 58,305 as of December 31, 2015, or 2.3 percent per Appendix G. An estimated 695-to-1,385 new statewide hotel and motel rooms were under construction, or could be finalized in 2016, or up 1.2 to 2.4 percent.

Mississippi's inventory had 155 estimated bed-and-breakfasts as of September 30, 2015, with 832 total B&B rooms, 1,299 cabins, 13,653 recreational vehicle spaces with electricity and water, and 1,781 camp sites without hook-up.

CY2015 statewide average daily rate, based on Smith Travel Research was \$82.14, plus 2.1 percent versus \$80.49 in CY2014. Mississippi's CY2015 statewide occupancy percent was 57.5 using Smith Travel Research data for non-casino properties. State-licensed casino hotels had a 79 occupancy percent per Table 9, but many were comped. Their average daily rate was \$65.07. State-licensed casino hotel rooms totaled 11,608 as of December 31, 2015, or 19.9 percent, of 58,305 hotel/motel rooms.

### **City/County Tax Revenues and Fees Attributed to Travel and Tourism**

Travel and tourism's contribution to the local economy includes city/county tax revenues and permit fees. Some \$57.2 million, or 32.3 percent, of the \$176.9 million in city/county taxes/fees attributed to travel and tourism came from state-licensed casino city/county tax revenue portion of gross gaming revenues. Another \$119.7 million, or 67.7 percent, were from room/restaurant special tax revenues, hotel/motel real and personal property taxes including casinos and casino hotels/other hotels, restaurants, seawall taxes for coastal counties, Mississippi Department of Alcoholic Beverage Control permit license fees, petroleum taxes, motor vehicle rentals and TCI permit fees. These tax revenues do not include 18.5 percent of the state's 7-percent tax rate originating at the state level.

Room/restaurant tax percentages range from 1 to 5 percent. Tables 13-14 have FY2014 and FY2015 tax percentages by locality, plus gross travel and tourism special tax revenue. Some \$48.7 million, or 70 percent, of FY2015 special tax revenues were from restaurant sales, with \$20.8 million, or 30 percent, from lodging. FY2015 special tax revenues totaled \$69.5 million.

### **Travel and Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY2015**

Thirty tourism partners – CVB's, tourism commissions, partnerships – received FY2015 advertising and employment/payroll mini-surveys from October 2014 to September 2015. Twenty-one, or 70 percent, responded. Two have a calendar year operational set-up.

FY2015 travel and tourism employment/payroll data reflected 199 full-time-equivalent staff with \$9.2 million in salaries, wages and fringe benefits. The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category. These respondents – as a whole – reflected a total estimated FY2015 tourism budget of \$29.2 million.

The FY2015 advertising summary indicated \$9.6 million were spent by respondents, with \$3.47 million, or 36.2 percent, on traditional ad placement and production; \$1.39 million, or 14.5 percent on digital media placement (\$1,226,329) plus digital media services (\$166,715). They spent \$423,421 in ad agency retainer fees, \$316,493 for promotional items, \$253,405 for trade show participation cost, \$99,536 for FAM Tours, \$290,833 for billboard advertising, \$471,114 for brochure, collateral and other printing, \$1,771,425 in sponsorships and local events, \$365,733 for web site maintenance, \$544,219 from reported matching grant programs, \$54,536 – marketing research and \$72,675 for wayfinding signage.

## **STATEWIDE TRAVEL AND TOURISM LINKS**

### **Film Productions, Documentaries, and Commercials (Calendar Year or CY2015)**

Since its creation in 2004, the Mississippi Motion Picture Incentive Program has been successful in supporting the development and attraction of on-location film production. The Mississippi Film office experienced a "tipping point" year in 2014, and 2015 followed suit with another expansive year for the film industry in Mississippi.

Thirteen features were filmed entirely in Mississippi in 2015, with another four filming in part here. Also filming here were short films, reality series, documentaries, music videos, and commercials. The estimated direct production spend for these productions surpassed \$25 million, with the payroll for Mississippians approaching \$4.5 million. Films made in Mississippi in 2015: *Shark Lake*, *Isolation* (partial), *The Race of a Lifetime*, *I Killed My BFF*, *The Astronaut Wives Club* (partial), *The Bridge*, *Precious Cargo*, *The Hollow*, *Speech and Debate*, *God's Prayer*, *One Mississippi* (partial), *Don't Kill It*, *Extinction Event*, *The Neighbor*, *Soul Damage*, *Strange Weather*, and *The Acre Beyond the Rye*.

Reality programming made in Mississippi in 2015: *Bring It!* and *Home Town*.

Documentary programming made in Mississippi in 2015: *Gulf South Outdoors*, *Honey Brake Experience*, and *Ducks Unlimited Television*.

The incentive has been especially appealing to independent producers, which was noted by MovieMaker's distinction; and of striking interest is the fact that, unlike in previous years, only three projects were specifically set in Mississippi. While the public relations value of the larger films is great and bolstered by the profile of major personalities, the smaller independents have been shown to give our crew greater roles and utilize more of our acting pool which allows us a greater advantage as we move forward as a major production destination.

These projects were scattered throughout Mississippi, with both metro Jackson and the Coast being especially busy. One thing always mentioned by cast and crew alike is the support and hospitality of our communities, who roll out the red carpet for all productions, large or small, feature film or reality television. The commitment of these communities and elected officials to the growth of the industry in Mississippi has impressed every filmmaker. While each project created direct economic contribution and jobs for Mississippi, paychecks for Mississippiactors 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. With every corner of the state seeing production activity, countless local filmmakers launched filmmaking efforts in their respective communities all over the state. Native Mississippian Tom Rice brought a third production home to Mississippi, and several filmmakers who never left – Paula Lindsey of Mississippi Gulf Coast Studios and Rick Moore of Eyevox/The Mississippi Film Studios at Canton – not only filmed projects here, but also, along with Jack Prince (Waveland Studios), expanded their permanent production presence.

Incentives and work force training were essential elements outlined in the groundbreaking 2003 Mississippi Film Office Agenda for the future of the film industry in Mississippi. The Agenda focused the attention on incentives for both Hollywood and local production, advocated the creation of film industry training programs, and outlined the development of film funding for Mississippi production. All of these areas showed marked growth in 2015:

- Government commitment with the enhancement of the statewide incentive program.
- Education with a reinvigoration of the film program at USM and a new focus on film at Ole Miss.
- The continuation of community college based curriculum at Hinds Community College and Pearl River Community College.
- Widespread private and public seminars and workshops through community and festival initiative.
- Private commitment with the enhancement of production facilities in Biloxi, Gulfport, and Waveland, and an expansion of the Mississippi Stages in Canton.
- Financial commitment through the leadership of Charter Bank, BankPlus, The First, and Butler Snow.

These endeavors will not only train our workforce of tomorrow, but also will create the full time jobs in production, support service and financial enterprise needed to support and maintain an expanding industry. The FY2015 Travel and Tourism Economic Contribution Report indicated motion picture and video production jobs increased by 90.4 percent versus FY2014, and their payroll more than doubled in FY2015.

In other areas central to the mission of creating a vibrant and nurturing film environment, the Mississippi Film Office again supported the professional production alliances located in Jackson and on the Coast, sponsored statewide film festivals and related events through incentive grants and programming support. It directly supported indigenous filmmaking by continuing to fund the Mississippi Emerging Filmmakers Grant program administered by the Mississippi Film and Video Alliance and supporting the efforts of Barefoot Documentary Workshops.

### **Selected State Agencies with Travel and Tourism Links: FY2015 Operations Mini-Surveys**

State agencies – Mississippi Arts Commission, Mississippi Gaming Commission and others – furnished major objects of expenditure data. These mini-surveys estimated a portion of tourism's "government expenditures," a complementary component to tourism capital investment and travel expenditures. FY2015 state government expenditures were \$19.7 million, including Welcome Center and rest area maintenance.

In 2014 the Mississippi Arts Commission reported \$335,290 in contractual services, and \$1,269,541 in subsidies, loans and grants. Mississippi Gaming Commission spent \$2,072,246 for contractual services; \$100,300 in subsidies, loans and grants; \$230,000 for commodities; and \$220,000 for capital outlays, such as equipment and vehicles. Pearl River Valley Water Supply District's budget was \$2,964,024 for contractual, plus \$861,164 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences had \$200,000 for contractual services and \$314,919 for subsidies, loans and grants. During the 2015 Legislative Session, the Mississippi Legislature appropriated \$4,876,298 for the purpose of providing funds for tourism advertising and promotion for the fiscal year beginning July 1, 2015 and ending June 30, 2016. The Mississippi Department of Transportation spent \$6,241,035 to maintain Welcome Centers and rest areas.

### Visit Mississippi Visitor Profile Study, FY2015

Some 22.33 million estimated total visitors in FY2015 – all domestic leisure, plus all business, plus other personal, plus all group travel, plus international visitors – overnighed in, or did a day trip to Mississippi, or an increase of 1.5 percent versus 22 million in FY2014. Sources were the TNS Mississippi Travels America FY2015 Visitor Profile study; Mississippi Gaming Commission quarterly surveys – patrons by state of origin and occupancy rates for state-licensed casino hotels; Smith Travel Research surveys; Mississippi Welcome Center registration data; state park visitation; among other sources.

TNS, a domestic visitation source, cited 79 percent as leisure travelers-tourists; 14 percent business and 7 percent personal business/other. Sixty-seven percent of all visitors were from out-of-state, and 67 percent of Mississippi trips were overnight ones. Thirty-three percent were day trips. Leisure trips to Mississippi were 70 percent overnight and 30 percent day. Business trips to Mississippi were 65 percent overnight and 35 percent day. Some 84 percent of all FY2015 overnight leisure visitors came from eight states – Mississippi (33 percent), Louisiana (15 percent), Alabama (8 percent), Texas (8 percent), Florida (7 percent), Tennessee (7 percent), Georgia (4 percent) and Arkansas (2 percent). The top six origin-designated market areas are Jackson (Mississippi), New Orleans, Memphis, Columbus-Tupelo-West Point, Mobile-Pensacola and Baton Rouge. Top Mississippi destinations: Gulf Coast, metro Jackson, Hattiesburg, Tunica and DeSoto counties, Meridian, Oxford, Vicksburg, Natchez, Starkville and Philadelphia.

Average annual household income for all Mississippi visitors: \$66,200 (median \$49,400); average age: 50 (median 52). Average travel party size: 3.1 persons (3.3 persons for leisure and 2 persons for business), with 2.5 nights spent in Mississippi. In-state residents spent 2.1 nights, on average, in their home state while non-residents spent 2.8 nights, on average, visiting Mississippi. About 43 percent traveled in pairs, and 22 percent traveled with children. Five percent of all Mississippi visitors arrived by air. Vacation activity niche characteristics varied with casino gamers as the largest market. Data was based on qualified households.

### Visit Mississippi Ad Effectiveness Study, FY2015

DPA, a division of Digital Research, Inc., produced the FY2015 Visit Mississippi Ad Effectiveness Study. This on-line survey was fielded April 22 – May 5, 2015, to capture data from domestic consumer leisure travelers, as part of the Mississippi Homecoming Campaign. Designated market areas within a 250-to-500 mile radius of Mississippi included Baton Rouge, Birmingham, Memphis, Mobile-Pensacola and New Orleans. A small portion of all travelers surveyed were in-state residents. Total survey respondents were 2,026.

Designated market areas and the remainder of the 250-mile radius had a much higher recall of all ad types, versus the 251-to-500 mile radius. Mississippi online ads had higher recall than print ads and the TV spot. One-fourth of respondents remembered a Mississippi Homecoming ad without prompting, compared to these unaided advertising awareness numbers: Florida (69 percent), Tennessee (41 percent), Louisiana (35 percent), Georgia (31 percent), Alabama (29 percent) and Arkansas (21 percent). The focus was on influenced travelers – more likely to like Visit Mississippi on Facebook – 28 percent, versus 19 percent for visitors not influenced by the ads. Eighty-two percent of the visitors influenced by the advertisements sought additional information on a Mississippi destination via friends or relatives versus 46 percent of visitors not influenced by the ads.

Average (and median) age of visitors to Mississippi was 47. Their average household income was \$82,610, and their median household income was \$62,500. Most (92 percent) of Mississippi visitors were from out-of-state market areas, e.g., New Orleans – 18 percent; Memphis – 14 percent; Baton Rouge – 13 percent; Mobile-Pensacola – 11 percent; in-state: 8 percent; Birmingham – 7 percent; 251-to-500 miles: 25 percent; and other (250 miles): 4 percent. Nine out of 10 travelers to Mississippi used their own car and only four percent came via air. Friends and relatives were the top sources of information about Mississippi trips, followed by general internet searches. One-fourth of all travelers stopped at a state Welcome Center. Casino gaming (25 percent) and visiting friends and relatives (24 percent) were top two Primary Purpose motives. Mississippi trip planning: one week or less (24 percent); two-to-three weeks (29 percent); one-two months (25 percent); three plus months (21 percent). Mississippi travelers are much more likely than non-travelers to be receptive to additional Mississippi leisure trips.

The FY2015 return on investment of the Homecoming Campaign was \$12.93-to-\$1, based on an estimated \$33.8 million coming into the state's General Fund, divided by \$2.6 million in domestic consumer ad placement and production costs, retainer fees, tour guide, etc. This was the eighth Mississippi Ad Effectiveness Study done since FY2004. A composite ROI for the last eight ad effectiveness studies is \$10-to-\$1, ranging from a low of \$5.48 in FY2009 to \$13 in FY2004. Our FY2012 ROI of \$6.46-to-\$1 was half of the FY2015 ROI of \$12.93-to-\$1. Ad-related ROI estimates are subjective, with different contractors used by different states. For example, Visit Florida had an FY2015 ad-related ROI of \$18-to-\$1; North Carolina ROI: \$15-to-\$1; and Tennessee ROI: \$19-to-\$1. In past years, Arkansas has reported an ROI of \$10-to-\$1, and Louisiana has reported an ROI of \$17-to-\$1.

### American Express Traveler Study, FY2015

Destination Travel Insights, a collaborative endeavor between American Express and the U.S. Travel Association, was a source of travel data for domestic and international travelers who used the American Express card when traveling on business or leisure to Mississippi. FY2015 data shows 508,533 total domestic travelers, with 352,509 leisure travelers making up 69.3 percent and 156,024 business travelers accounting for the remaining 30.7 percent of all domestic travelers. Top 10 domestic market areas of AMEX traveler origin, leisure and business combined were Jackson, Memphis, Atlanta, New Orleans, Birmingham, Mobile-Pensacola, Houston, Dallas-Ft. Worth, Nashville and Baton Rouge. Total domestic traveler spending in FY2015 was \$284.66 million. Under the criteria applied, the home domestic market area of visitor is different from the destination domestic market area and at least one \$100 expenditure plus a hotel transaction or at least one hotel transaction of any amount and one airline transaction.

International visit criteria reflected visitors residing outside the U.S. and at least two separate merchant transactions within lodging, restaurants and retail. Some 4,878 International travelers furnished FY2015 data. Canada (23.8 percent), The U.K. (13.3 percent), Mexico (11.5 percent), Germany (7.8 percent), Australia (6.7 percent), France (4.1 percent), The Netherlands (3.7 percent), Japan (2.7 percent), Italy (2.4 percent) and Norway (2.1 percent) were the Top 10 origin countries for AMEX card users. International travelers spent a collective \$3.19 million in Mississippi. On average, they spent 3.1 days in Mississippi and roughly \$650 per person in Mississippi, about \$210 per day. AMEX cards are less prevalent in some countries vis-à-vis other credit cards. AMEX-related data should not be used to estimate visitor volume nor is a definitive listing of countries of origin when it comes to international travel activity.

### Statistics Canada Overnight Travel to Mississippi, CY2014

Per Statistics Canada, 51,300 Canadians overnighted in Mississippi during 2014. Some 37,700 of these travelers, or 73.4 percent, were from Ontario. Average travel party size was two persons; average length of stay: two nights. An estimated \$10.84 million in U.S. dollars were spent by 25,650 travel parties, or about \$423 per travel party. Most (81.5 percent) of these travel parties were on a vacation; about one in eight (12.7 percent) were visiting friends and relatives; the remainder (5.8 percent) listed other personal/business reasons. Very few of these travelers were on a business trip. More than two-thirds of these Canadian overnight travelers were between the age of 55 and 74. Data appear to indicate Mississippi gets more international travelers from Canada than from any other country in the world.

### Table 13

Room/Restaurant Gross Special Tax Revenues by Tourism Office, FY2014

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY2014 Room Tax Revenue	Gross FY2014 Restaurant Tax Revenue	Gross FY2014 Total Tax Revenue
Aberdeen	1.0	1.0	\$4,000	\$65,830	\$69,830
Baldwyn	None	2.0	None	128,617	128,617
Batesville	3.0	3.0	221,533	894,920	1,116,453
Bay Springs	3.0	None	3,737	None	3,737
Brandon	None	2.0	None	843,748	843,748
Byhalia	2.0	None	16,147	None	16,147
Canton	2.0	2.0	100,000	430,347	530,347
Cleveland	2.0	2.0	100,888	610,000	710,888
Clinton	2.0	None	314,963	None	314,963
Coahoma County	2.0	1.0	97,507	292,223	389,730
Columbus-Lowndes	2.0	2.0	236,720	1,649,327	1,886,047
Como	\$1 per night	2.0	47	2,327	2,374
Corinth	2.0	2.0	100,000	1,039,133	1,139,133
DeSoto County&	2.0	2.0	1,114,881	6,000,000	7,114,881
Florence	None	2.0	None	216,712	216,712
Flowood	None	2.0	None	2,102,059	2,102,059
Fulton	3.0	None	50,236	None	50,236
Greenwood	1.0	1.0	102,108	348,725	450,833
Grenada	2.0	1.0	111,712	328,234	439,946
Hancock County	2.0	None	112,762	None	112,762
Harrison County	5.0	None	6,379,648	None	6,379,648
Hattiesburg	2.0	2.0	612,056	4,592,203	5,204,259
Hernando	3.0	None	10,664	None	10,664
Holly Springs	2.0	2.0	37,665	254,737	292,402
Horn Lake	\$2 per night	None	188,508	None	188,508
Indianola	2.0	2.0	20,000	330,572	350,572
Jackson (city)*	4.0	2.0	2,680,052	5,703,337	8,383,389
Kosciusko	2.0	None	31,180	None	31,180
Lauderdale County	2.5	None	808,651	None	808,651
Laurel	2.0	2.0	193,311	1,295,290	1,488,601
Louisville	2.0	None	34,630	None	34,630
Magee	1.0	1.0	24,657	251,260	275,917
McComb	3.0	None	296,394	None	296,394
Montgomery County	2.0	None	45,555	None	45,555
Moss Point	3.0	None	356,682	None	356,682
Natchez#	3.0 plus \$2	1.5	889,094	721,423	1,610,517

Table 13 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY2014 Room Tax Revenue	Gross FY2014 Restaurant Tax Revenue	Gross FY2014 Total Tax Revenue
New Albany	2.0	2.0	69,343	557,409	626,752
Newton	\$1/room night	None	9,505	None	9,505
Ocean Springs	2.0	2.0	33,028	1,074,156	1,107,184
Oxford	2.0	2.0	233,703	2,299,006	2,532,709
Pascagoula	3.0	None	127,109	None	127,109
Pearl	None	2.0	None	720,837	720,837
Philadelphia	3.0	None	119,224	None	119,224
Picayune	2.0	1.0	58,940	367,868	426,808
Pontotoc	2.0	2.0	9,212	358,762	367,974
Rankin County	2.0	None	883,713	None	883,713
Richland	None	2.0	None	367,169	367,169
Ridgeland	1.0	1.0	330,000	1,146,184	1,476,184
Ripley	2.0	2.0	10,912	256,000	266,912
Sardis	3.0	3.0	12,277	80,000	92,277
Senatobia**	2.0	2.0	2,103	61,282	63,385
Southaven	1.0	1.0	311,074	1,344,269	1,655,343
Starkville	2.0	2.0	230,081	1,660,649	1,890,730
Stone County	2.0	2.0	28,523	305,536	334,059
Tishomingo County	2.0	None	29,221	None	29,221
Tunica County	3.0	3.0	491,625	1,414,543	1,906,168
Tupelo	2.0	2.0	525,000	3,328,042	3,853,042
Vicksburg	3.0	1.0	793,678	836,817	1,630,495
Washington County	3.0	1.0	323,983	542,931	866,914
West Point	2.0	2.0	63,600	409,558	473,158
Yazoo County	2.0	2.0	70,000	368,502	438,502
Total			\$20,061,842	\$45,600,544	\$65,662,386

NOTE: Tourism offices include Convention and Visitors Bureaus, convention and visitor councils, tourism associations, tourism commissions and councils, cities/counties and chambers. A portion of these gross revenues are attributed to locals.

September 2013-August 2014 Collections (July 2013-June 2014 Sales).

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

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

& DeSoto County hotels-motels have a 2.0 percent county lodging tax plus city taxes/fees.

\*\* Tax first collected August 2014 (June 2014 sales).

Some figures may reflect adjustments-overpayments.

SOURCE: Department of Revenue, 2014.

**Table 14**

Room/Restaurant Gross Special Tax Revenues by Tourism Office, FY2015

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY2015 Room Tax Revenue	Gross FY2015 Restaurant Tax Revenue	Gross FY2015 Total Tax Revenue
Aberdeen	1.0	1.0	\$5,284	\$71,305	\$76,589
Baldwyn	None	2.0	None	139,317	139,317
Batesville	3.0	3.0	200,409	984,492	1,184,901
Bay Springs	3.0	None	3,585	None	3,585
Brandon	None	2.0	None	969,975	969,975
Brookhaven*	2.0	None	84,209	None	84,209
Byhalia	2.0	None	15,425	None	15,425
Canton	2.0	2.0	115,482	527,302	642,784
Cleveland	2.0	2.0	105,567	666,032	771,599
Clinton	2.0	None	130,094	None	130,094
Coahoma County	2.0	1.0	113,908	294,785	408,693
Columbus-Lowndes	2.0	2.0	335,954	1,754,372	2,090,326
Como	\$1 per night	2.0	110	2,584	2,694
Corinth	2.0	2.0	105,654	1,151,694	1,257,348
DeSoto County&	2.0	2.0	1,000,000	6,017,822	7,017,822
Florence	None	2.0	None	275,039	275,039
Flowood	None	2.0	None	2,264,317	2,264,317
Fulton	3.0	None	57,212	None	57,212
Greenwood	1.0	1.0	90,188	339,185	429,373
Grenada	2.0	1.0	162,604	373,363	535,967
Hancock County	2.0	None	126,076	None	126,076
Harrison County	5.0	None	6,618,045	None	6,618,045
Hattiesburg	2.0	2.0	624,721	4,769,318	5,394,039
Hernando	3.0	None	19,892	None	19,892
Holly Springs	2.0	2.0	34,956	276,516	311,472
Horn Lake	\$2 per night	None	290,731	None	290,731
Indianola	2.0	2.0	30,549	361,341	391,890
Jackson (city)**	4.0	2.0	2,624,884	6,093,224	8,718,108
Kosciusko	2.0	None	24,058	None	24,058
Lauderdale County	2.5	None	776,284	None	776,284
Laurel	2.0	2.0	198,015	1,299,818	1,497,833
Louisville	2.0	None	47,897	None	47,897
Magee	1.0	1.0	28,206	197,676	225,882
McComb	3.0	None	282,378	None	282,378
Montgomery County	2.0	None	41,846	None	41,846
Moss Point	3.0	None	290,501	None	290,501

Table 14 (continued)

Tourism Office, City/ County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY2015 Room Tax Revenue	Gross FY2015 Restaurant Tax Revenue	Gross FY2015 Total Tax Revenue
Natchez#	3.0 plus \$2	1.5	932,376	750,096	1,682,472
New Albany	2.0	2.0	75,734	615,701	691,435
Newton	\$1/room night	None	9,396	None	9,396
Ocean Springs	2.0	2.0	35,132	1,170,562	1,205,694
Oxford	2.0	2.0	301,336	2,533,230	2,834,566
Pascagoula	3.0	None	155,641	None	155,641
Pearl	None	2.0	None	772,597	772,597
Philadelphia	3.0	None	109,751	None	109,751
Picayune	2.0	1.0	59,771	396,841	456,612
Pontotoc	2.0	2.0	8,514	375,167	383,681
Rankin County	2.0	None	937,075	None	937,075
Richland	None	2.0	None	399,998	399,998
Ridgeland	1.0	1.0	357,262	1,246,206	1,603,468
Ripley	2.0	2.0	11,871	257,824	269,695
Sardis	3.0	3.0	12,073	83,848	95,921
Senatobia	2.0	2.0	14,895	388,750	403,645
Southaven	1.0	1.0	287,492	1,923,618	2,211,110
Starkville	2.0	2.0	320,420	1,828,442	2,148,862
Stone County	2.0	2.0	30,103	376,123	406,226
Tishomingo County	2.0	None	58,545	None	58,545
Tunica County	3.0	3.0	745,681	955,016	1,700,697
Tupelo	2.0	2.0	547,769	3,432,396	3,980,165
Vicksburg	3.0	1.0	779,115	893,296	1,672,411
Washington County	3.0	1.0	332,642	592,543	925,185
West Point	2.0	2.0	58,611	439,523	498,134
Yazoo County	2.0	2.0	67,913	390,801	458,714
Total			\$20,833,842	\$48,652,055	\$69,485,897

NOTE: Tourism offices include Convention and Visitors Bureau, convention and visitor councils, tourism associations, tourism commissions, and councils, cities/counties and chambers. A portion of these gross revenues are attributed to locals.

September 2014-August 2015 Collections (July 2014-June 2015 Sales).

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

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

& DeSoto County hotels-motels have a 2.0 percent county lodging tax plus city taxes/fees.

\* City of Brookhaven room/restaurant taxes first collected November 2014.

Some figures may reflect adjustments-overpayments.

SOURCE: Department of Revenue, 2015.

## Tourism Capital Investment (TCI) FY 2015 Surveys (October 2014 – September 2015)

FY2015 TCI data were updated, with input from city and county building/permit departments, chambers of commerce, Dodge Data & Analytics and state agencies. Appendices E and F list county level FY2014 and FY2015 TCI expenditures. TCI valuation is based on commercial permits issued and tourism factors for new construction and expansion and/or renovation of tourism-related businesses and projects. Dollar amounts do not reflect announcements or dollars spent during a multi-year period. They reflect estimated 12-month contract construction costs and permit fees, but not land acquisition costs, site prep, planning, casino or business equipment purchasing costs, condo “flipping,” furniture and fixtures, etc. Many entities don’t furnish data. TCI is a net travel and tourism estimate since it focuses on travel and tourism construction.

Total estimated FY2015 statewide TCI was \$299.3 million, based on data secured, and \$305 million in FY2014, or \$5.7 million less – a 1.9-percent decrease. Some \$192.7 million, or 64.4 percent of FY2015 TCI, was from private sources. The other \$106.6 million, or 35.6 percent, came from federal, state and local government sources.

The Mississippi Gulf Coast accounted for \$172.2 million in FY2015 TCI, or 57.5 percent of the state’s total. Retail establishments, infrastructure (airport-highway), a new casino and hotel project, casino renovations, restaurants and others comprised this TCI.

Jackson’s metropolitan statistical area – including Copiah, Hinds, Madison, Rankin, Simpson and Yazoo counties – combined FY2015 TCI was \$32.9 million, or 11 percent of the FY2015 statewide TCI. Projects included new and renovated museums in Jackson; Jackson-Medgar Evers International Airport capital investment; Madison-Rankin infrastructure projects, restaurants and retail; and a new hotel in Florence.

DeSoto County had a new outlet mall built in Southaven; Horn Lake cited a new Wal-Mart Super Center; Olive Branch reflected a new retail center project. Most of the infrastructure focused on State Road 304-Interstate 69, of the estimated countywide \$11.7 million in TCI. Sunflower County (Indianola’s) TCI of \$3.7 million was mostly for a brand new hotel. Tunica County’s \$2 million in FY2015 TCI was for the Gateway to the Blues Visitor Center and airport-related projects. Bolivar County’s (Cleveland) \$1.8 million in TCI featured the GRAMMY Museum® Mississippi.

The Hattiesburg area (Forrest/Lamar counties) had \$10.7 million in FY2015 TCI. This included a new hotel and infrastructure. Jones County’s \$2.3 million TCI mainly included airport projects and other infrastructure. Pike County’s FY2015 TCI had railroad museum-convenience store renovations in the mix. Tupelo’s \$5.1 million for FY2015 TCI covered retail renovations plus new retail, new restaurants, infrastructure, among others. Oxford-Lafayette County TCI was \$16.7 million – football stadium improvements, a state-of-the art basketball arena, State Road 6 maintenance, two new hotels, infrastructure, etc. Marshall County featured much infrastructure-related work, as part of \$6 million TCI.

Meridian/Lauderdale County’s FY2015 TCI covered a new convenience store, athletic field improvements and infrastructure. Starkville/Oktibbeha County’s estimated \$13.3 million TCI was driven by college football stadium expansion and renovation. Columbus-Lowndes County’s \$2.3 million in TCI included airport improvements, a new convenience store, museum exhibits, plus highway construction. Neshoba County’s FY2015 TCI centered on park and historic site renovations. Scott County had \$1.1 million in TCI, mainly for new highway construction and state park renovations.

Natchez had \$2 million in FY2015 TCI, with infrastructure, train depot renovation, bed and breakfast and restaurant renovations. Vicksburg’s \$1.5 million, FY2015 TCI, was infrastructure.

FY2016 TCI will continue to secure data from building/planning departments. TCI will vary in subsequent years, depending on the nature of TCI projects, the thorough scope of the data provided by the various sources and the completed surveys returned.

### Delimitations

This study is delimited to travel and tourism businesses in Mississippi’s 82 counties. Private, public, nonprofit and quasi-public firms directly and indirectly affected by travel and tourism are represented in this study.

### Limitations

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

This study uses statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. IMPLAN 2014 data intersect, but are not identical with, study data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties/cities. Limitations at the county level include the difficulty in assigning percent figures in traveler/visitor sales as a proportion of total sales in a given county.

## GLOSSARY

- Balance of travel and tourism trade:** Travel and tourism exports minus travel and tourism imports, taking leakage into account.
- Comped rooms:** Lodging arrangement where the occupied room is not paid for by the guest.
- Composite industry:** One such as travel and tourism, comprising different sectors of the economy, e.g. accommodation & food services; retail trade, including gas at the pump; construction.
- Concentration rank:** Travel and tourism employment divided by nonfarm establishment-based employment.
- Deplanements:** The number of scheduled airline passengers exiting a plane.
- Designated Market Area (DMA):** Counties that share the same primary TV broadcast signals.
- 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.
- Federal and local government fiscal year:** October 1, 2014 – September 30, 2015.
- Full-time equivalent (FTE):** The estimated number of full-time paid employees, plus a ratio of one paid FTE for every 2 to 2.5 part-time or seasonal employees.
- General Fund:** Travel and tourism's contribution to Mississippi's General Fund includes a portion of these revenues related to travel and tourism—sales tax, personal income tax, gaming fees and taxes, impact of additional labor income, construction activity tax and other taxes.
- Government expenditures:** The estimated public expenditures from state agency, city and county budgets allocated for travel and tourism-related projects, or projects with some travel and tourism impact, excluding Tourism Capital Investment (TCI).
- Gross gaming revenues:** Net gains realized by a casino after payment of all cash paid out as losses to patrons and those amounts paid to purchase annuities to fund losses paid to patrons during several years by independent financial institutions.
- IMPLAN:** A nationally recognized economic contribution model to estimate the economic activity associated with a sale of a good or service. It is the basis for estimating indirect and induced contributions. In the IMPLAN model, indirect and induced impacts are filtered through a Social Accounting Matrix (SAM) for total value added, employment and labor income.
- Indirect contribution:** Secondary contribution of purchase of production by the firm (business level), holding everything else constant. Example: Hotels purchase cleaning supplies.
- Induced Contribution:** Secondary contribution from the purchases made by the workers (consumer level), holding everything else constant. Example: Hotel employee wages contribute to the purchase of goods and services in the local economy.
- In-state traveler spending:** Mississippians traveling within the state, at least 50+ miles, one-way.
- Leakage:** Money that leaves an area, e.g., a state, during the various rounds of expenditures.
- Metropolitan Statistical Area (MSA):** Have at least one urbanized area of 50,000 or more population, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties.
- Mississippi Travel and Tourism Economic Contribution Model:** Estimates employment, payroll, expenditures, General Fund revenues, capital investment and value added. In Mississippi, it reflects travel and tourism's economic contributions for this rural state with coastal counties.
- Multipliers:** The direct contribution plus the indirect contribution plus the induced contribution divided by the direct contribution. It's an indicator of SAM linkages in the economy.
- Net traveler/visitor sales and tax revenues:** Estimated portion of travel and tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales and General Fund revenues.
- Nominal dollars:** Travel and tourism payroll and expenditures by visitors not adjusted for inflation. Real dollar amounts are adjusted for inflation. This report only presents nominal dollar amounts. Ditto for prior travel and tourism economic contribution reports.
- North American Industry Classification System (NAICS) codes:** Six-digit coding system started in 1997, then updated in 2001, 2007 and 2012. The structure of NAICS is hierarchical. The first two digits of the code designate the sector, the third digit designates the subsector, the fourth digit designates the industry group, the fifth digit designates the NAICS industry and the sixth digit designates the national industry. NAICS uses a production-oriented approach to categorize economic units and focuses on how products and services are created. NAICS replaced the Standard Industrial Classification (SIC) system for statistical purposes.
- Qualified households:** Qualified households will have traveled 50+ miles from home, or overnight for business or pleasure, but exclude commuters. All FY2015 Visitor Profile Study respondents were required to have traveled for leisure in the past 12 months.
- Ridership (Amtrak):** Equal to half of total boardings and alightings (getting on and off the train).

**Secondary jobs and income:** Those jobs outside the travel and tourism business or entity. Example: Truck driver who delivers linens to a hotel, or food & beverage products to restaurants. The income component pertains to wages earned by those with secondary jobs.

**Sector:** The broad two-digit NAICS category, e.g., sector; 44 - 45 retail trade (sector under trade, transportation & utilities); 72 accommodation and food services (sector under leisure & hospitality supersector).

**State fiscal year:** July 1, 2014 to June 30, 2015.

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

**State-level travel and tourism accounts:** A system that encompasses travel and tourism's broader view. Its focus: circular flow of goods and services in the economy between travel and tourism industry supply and the impact of travel and tourism commodity demand within a state.

**Sub-sectors:** More specific three-digit NAICS categories; e.g., 311 food manufacturing under 31 manufacturing; 447 gasoline service stations under 44 retail trade.

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

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

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

**Travel and tourism economy:** Group, match and use NAICS and IMPLAN codes to estimate travel and tourism's state-county contribution of value added, employment and labor income associated with travel and tourism, TCI, travel and tourism's contribution to the General Fund, travel expenditures, government spending, travel and tourism exports and imports. Overlapping elements exist between travel and tourism economy and industry.

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

**Travel and tourism GDP (value added):** Value added of travel and tourism's composite nature expressed as its overall contribution to State GDP, or value added divided by GDP. Travel and tourism GDP measures: direct contribution of the travel and tourism Industry. Current-dollar GDP is used for FY2015 travel and tourism activity in Mississippi, as opposed to inflation-adjusted real GDP.

**Travel and tourism imports:** Travel expenditures by Mississippi residents outside the state.

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

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

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

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

# ACKNOWLEDGMENTS

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Greenville, City of. Amelia D. Wicks, City Clerk.

Hancock County. Michelle K. Cuevas, Accounts Receivable Clerk.

International, Regional and Tunica County Airports:

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

Hattiesburg-Laurel Regional Airport. Thomas Heanue, Executive Director; Nancy Gibson, Assistant.

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

Meridian Airport Authority. Debbie Moulds, Executive Assistant.

Tunica County Airport. Eric Konupka, Executive Director; Tracy Webb, Finance Director.

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Real and Personal Property Hotel/Motel Tax Collections (via county tax collectors and/or tax assessors, in place as of December 31, 2015):

Adams County. Peter Burns, Jr., Tax Collector; Reynolds Atkins, Tax Assessor.

Alcorn County. Larry Ross, Tax Collector.

Amite County. Eunice Blake, Tax Assessor and Collector; Brittany Deese.

Bolivar County. Nancy J. Havens, Tax Assessor and Collector; Tiffany White.

Chickasaw County. Sue Ard, Tax Assessor and Collector.

Claiborne County. Rashod Smith, Diane Davaul, Tax Assessor/Collector's Office.

Clarke County. Hope Moore Herrington, Tax Assessor and Collector; LeAnn Hollis, Appraisal.

Clay County. Paige Lamkin, Tax Assessor and Collector.

Coahoma County. Hattie Shivers, Tax Assessor and Collector.

Copiah County. Pam Hudson, Deputy Tax Assessor.

Covington County. Cindy A. Sanford, Tax Assessor and Collector.

DeSoto County. Erin Shook, Tax Collector's Office, and web site.  
Forrest County. Delbert Dearman, Tax Collector; Terri Smith.  
Franklin County. T.J. (Jeff) Mullins IV, Tax Assessor and Collector.  
Grenada County. David Melton, Tax Assessor and Collector.  
Hancock County. Jimmie Ladner, Jr., Tax Collector.  
Harrison County. Allison Ellison, Tax Collector's Office.  
Holmes County. Mary Rule McGee, Tax Assessor and Collector.  
Inverness, City of. Patricia Lockett, City Clerk.  
Itawamba County. Aaron Loden, Tax Collector.  
Jackson County. Nick Elmore, Tax Assessor.  
Jasper County. Patty Ishee, Tax Assessor and Collector.  
Jefferson Davis County. Kelley Ross Brown, Tax Assessor and Collector.  
Jones County. Lucky Holifield, Appraisal Office.  
Lafayette County. Sylvia Baker, Tax Assessor and Collector; Katie Kaiser, Visit Oxford.  
Lamar County. Jack Smith, Tax Assessor and Collector; Robin Duncan.  
Lauderdale County. Brandi Coghlan, Deputy Tax Collector.  
Lawrence County. Angel Powell, Tax Collector's Office.  
Leake County. Kim Withers, Tax Assessor and Collector.  
Lee County. Sarah Beth McCarter, Deputy Clerk, Tax Collector's Office.  
Leflore County. Annie Conley, Tax Collector; Carolyn, assistant.  
Lincoln County. Lance Ramshur, Personal Property.  
Lowndes County. Greg D. Andrews, Tax Assessor and Collector; Tina Blunt.  
Madison County. Debra Johnson, Tax Assessor's Office.  
Marshall County. Betty Byrd, Tax Assessor and Collector.  
Monroe County. Pat Birkholz, Tax Collector.  
Montgomery County. Velma Young, Tax Assessor and Collector. Monica Turner, Deputy Clerk.  
Neshoba County. Mike Lewis, Tax Collector.  
Oktibbeha County. Barbara Cubon, Oktibbeha County Tax Office.  
Pearl River County. Darlene Hyatt, Tax Assessor/Collector's Office.  
Pike County. Gwendolyn J. Nunnery, Tax Collector.  
Rankin County. Judy Fortenberry, Tax Collector.  
Scott County. Beth Watson, Tax Assessor's Office.  
Simpson County. Dawn Bradshaw, Office of Tax Assessor/Collector.  
Sunflower County. Renee Upton, Accountant, Tax Collector's Office.  
Tippah County. Ronnie Martindale, Tax Assessor's Office.  
Tishomingo County. Paul F. Whitlock, Tax Collector; Diana Turner, Tax Assessor.  
Tunica County. Norma Anderson, Tax Assessor and Collector.  
Union County. Randy Dunnam, Tax Collector.  
Walthall County. LeAnna Dillon, Tax Collector's Office.  
Washington County. Mark Seard, Tax Assessor.  
Wayne County. Rose Trisler, Tax Assessor – Collector's Office.  
Yalobusha County. Linda Rae Shuffield, Tax Assessor and Collector.  
Yazoo County. Travis Crimm, Jr., Tax Collector.

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Greenwood, City of. Penny Hodge, Code Enforcement Office.

Gulfport, City of. Gary Anderson, Deputy Building Official.  
Indianola, City of. Pearl Watson, Building Inspector Assistant.  
McGraw-Hill Construction/Dodge. Timothy Boothroyd, Economic Analyst.  
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Richland, City of. Melissa Ashley, Public Works/Community Development.  
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Columbus Office. Ralph Antonelli, Park Manager, Columbus Office.  
Vicksburg Headquarters. Lawran Richter, Outdoor Recreation Planner.

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Mississippi Final Stands Interpretive Center. Edwina Carpenter, Curator.  
Natchez National Historical Park. Melissa Tynes, Division Chief.  
Natchez Trace Parkway. Maggie Walker, Superintendent's Office.  
Shiloh National Military Park/Corinth site. Ashley Berry, Supervising Ranger.  
Vicksburg National Military Park. Shirley Smith, Human Resources Assistant.

Visit Mississippi. Leigh Portwood, MDA-Program Manager I.

# Appendices

## Appendix A

### Estimated Travel and Tourism Direct Employment, FY2014 and FY2015

CATEGORY	FY2014	FY2015	CHANGE
Food Services & Drinking Places (1)	28,355	28,855	1.8%
Lodging, excluding all casino hotels (2)	12,535	12,670	1.1%
Gaming, state-licensed casinos and hotels (3)	22,277	22,237	-0.2%
Retail Trade (4)	9,757	9,885	1.3%
Support Activities, Air Transportation (5)	1,786	1,762	-1.3%
Air Passenger, Scheduled & Chartered (5)	263	215	-18.3%
Scenic & Sightseeing Transportation	29	25	-13.8%
Charter Bus Industry	106	110	3.8%
Taxi and Limo Service	56	48	-14.3%
Amtrak, Other Bus Transportation	77	76	-1.3%
Sub-Total, Transportation	2,317	2,236	-3.5%
Travel Arrangement/Reservations	379	397	4.7%
Passenger Car Rental	356	387	8.7%
Automotive Repair & Maintenance Services	313	306	-2.2%
Parking Lots & Garages	13	13	None
Advertising & Related Services	223	234	4.9%
Laundry Services	163	168	3.1%
Sub-Total, Other Services	1,447	1,505	4.0%
Motion Picture Theaters	146	143	-2.1%
Motion Picture & Video Production	135	257	90.4%
Museums, Historical Sights & Similar (6)	387	344	-11.1%
Performing Arts, Spectator Sports & Related	574	690	20.2%
Amusement Parks, Bowling, Golf Courses, Marinas	1,142	1,125	-1.5%
Federal, State, Local Tourism Agencies/Offices (7)	798	773	-3.1%
Selected Convention Centers and Arenas	NA	93	NA
Gaming, Lodging, Other at tribal resorts (8)	1,800	1,804	0.2%
Selected Outdoor Recreation (9)	525	518	-1.3%
Construction (10)	2,030	2,000	-1.5%
<b>Total</b>	<b>84,225</b>	<b>85,135</b>	<b>1.1%</b>

## 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 and motels (NAICS 72111), other traveler accommodations (NAICS 72119) and RV parks and recreational camps (NAICS 7212), some residential property managers (NAICS 531311). Excludes state-licensed casino and tribal casino/resort hotels.
3. Based on Labor Market Information and Mississippi Gaming Commission quarterly surveys; the data include state-licensed casino hotel employees. FY2015 Labor Market Information covered employment statewide data were used for the full-time equivalent figure.
4. Includes gasoline stations; department stores; warehouse clubs and superstores; other general merchandise stores; gift, novelty and souvenir shops, antiques and secondhand stores; clothing and shoe stores; sporting goods and book stores; specialty food and grocery stores; tobacco stores; pharmacies and drug stores; florists; book stores and news dealers; RV dealers; motorcycle, boat and other motor vehicle dealers; automotive parts and accessory stores; tire dealers; jewelry, luggage and leather goods stores.
5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.
6. Includes Mississippi Department of Archives and History and Natural Sciences Museum data.
7. Includes U.S. Army Corps of Engineers figures, Columbus and Vicksburg districts, plus the Natchez Trace Parkway, Vicksburg Military Park, Natchez National Historical Park, Shiloh National Military Park, Mississippi Final Stands Interpretive Center. Includes Visit Mississippi and Welcome Center staff, local tourism offices, other state agencies, Mississippi Arts Commission, Mississippi Gaming Commission, Pearl River Basin Development District and Pearl River Water Supply District. Convention center data are also included.
8. Estimates reflect estimated gaming and non-gaming employment at the tribal resort.
9. Includes some estimated agricultural tourism employment, outfitters, hunting and fishing guides. Mississippi Department of Wildlife, Fisheries and Parks, Parks Unit, included. The Pat Harrison Waterway District furnished calendar year 2010 and 2011 data.
10. Only reflects estimated travel and tourism-related construction activity.

SOURCES: Convention and Visitor Bureaus and other tourism offices, 2015.

Department of Revenue, 2015.

Mississippi Arts Commission, 2015.

Mississippi Department of Archives and History, 2015.

Mississippi Department of Employment Security, Labor Market Information Department, 2015.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2015.

Mississippi Gaming Commission, 2015.

Mississippi Museum of Natural Science, 2015 (under DWF&P).

Pearl River Basin Development District, 2015.

Pearl River Water Supply District, 2015.

U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg headquarters, 2015.

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

Mississippi Final Stands Interpretive Center

Natchez National Historical Park,

Shiloh National Military Park/Corinth

Vicksburg National Military Park, 2015.

Visit Mississippi, 2015.

## Appendix B

### Estimated Travel and Tourism Direct Payroll, FY2014 and FY2015

CATEGORY	FY2014 PAYROLL	FY2015 PAYROLL	CHANGE
Food Services & Drinking Places	\$373,567,663	\$388,219,931	3.9%
Lodging (1)	\$191,611,112	\$200,591,486	4.7%
Gaming (2)	\$710,661,498	\$658,163,526	-7.4%
Retail Trade (3)	\$186,349,271	\$189,779,083	1.8%
Support Activities, Air Transportation	96,990,607	104,384,046	7.6%
Air Passenger, Scheduled and Chartered	9,267,158	7,428,691	-19.8%
Scenic and Sightseeing Transportation	826,649	811,491	-1.8%
Charter Bus Industry	2,404,125	2,562,338	6.6%
Taxi and Limo Service	1,053,441	823,596	-21.8%
Amtrak, Other Bus Transportation	5,214,648	5,207,121	-0.1%
Sub-Total, Transportation	\$115,756,628	\$121,217,283	4.7%
Travel Arrangement/Reservations	10,677,888	11,329,890	6.1%
Passenger Car Rental	8,585,755	8,767,046	2.1%
Automotive Repair and Maintenance Services	9,998,526	10,054,026	0.6%
Parking Lots and Garages	202,689	204,936	1.1%
Advertising & Related Services	8,342,468	8,631,578	3.5%
Laundry Services	2,979,228	3,130,197	5.1%
Sub-Total, Other Services	\$40,786,554	\$42,117,673	3.3%
Motion Picture Theaters	1,541,364	1,494,794	-3.0%
Motion Picture and Video Production	5,983,302	14,702,510	145.7%
Museums, Historical Sights and Similar	12,001,005	10,008,932	-16.6%
Performing Arts, Spectator Sports, Related	12,986,245	14,249,972	9.7%
Amusement Parks, Bowling, Golf Courses, Marinas	19,584,926	18,475,297	-5.7%
Selected Convention Centers and Arenas	NA	2,206,125	NA
Federal, State, Local Tourism Agencies (4)	39,877,019	39,811,563	-0.2%
Gaming, Lodging, Other at tribal resorts (5)	53,000,000	54,000,000	1.9%
Selected Outdoor Recreation (6)	9,120,069	9,027,506	-1.0%
Construction (7)	\$73,416,102	\$73,337,762	-0.1%
Total	\$1,846,242,758	\$1,837,403,443	-0.5%

## Appendix B (continued)

1. Does not include the payroll of state-licensed casino hotels, nor Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos, plus casino hotels, but not the estimated payroll of Pearl River Resort casino employees. State-licensed casino payroll data reflect July 2014-June 2015 timeframe.
3. Includes gasoline stations; department stores; warehouse clubs and superstores; other general merchandise stores; gift, novelty and souvenir shops, antiques and secondhand stores; clothing and shoe stores; sporting goods and book stores; specialty food and grocery stores; tobacco stores; pharmacies and drug stores; florists; book stores and news dealers; RV dealers; motorcycle, boat and other motor vehicle dealers; automotive parts and accessory stores; tire dealers; jewelry, luggage and leather goods stores.
4. Includes the Natchez Trace Parkway, Vicksburg Military Park, Shiloh National Military Park, Mississippi Final Stands Interpretive Center, U.S. Army Corps of Engineers – Vicksburg and Columbus districts. Includes the staff at Visit Mississippi, the state's 13 Welcome Centers, local tourism offices/bureaus, plus other State Agencies, including Mississippi Arts Commission, Gaming Commission, Pearl River Basin Development District and Water Supply District.
5. Only reflects estimated payroll at tribal resort gaming and tribal nongaming venues.
6. Includes some estimated agricultural tourism employment, campgrounds, hunting and fishing. Includes Mississippi Department of Wildlife, Fisheries and Parks, Parks Unit, and Pat Harrison Waterway estimates.
7. Only reflects estimated travel and tourism-related construction activity.

NOTE: These are nominal dollar amounts, not adjusted for inflation.

SOURCES: Convention & Visitor Bureaus and other tourism offices, 2015.  
Department of Revenue, 2015.  
Mississippi Arts Commission, 2015.  
Mississippi Department of Archives and History, 2015.  
Mississippi Department of Employment Security, Labor Market Information Department, 2015.  
Mississippi Department of Wildlife, Fisheries and Parks (DWF&P), 2015.  
Mississippi Gaming Commission, 2015.  
Mississippi Museum of Natural Science, 2015 (under DWF&P).  
Pearl River Basin Development District, 2015.  
Pearl River Water Supply District, 2015.  
U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg Headquarters, 2015.  
U.S. Department of the Interior, National Park Service:  
    Mississippi Final Stands Interpretive Center  
    Natchez National Historical Park  
    Shiloh National Military Park/Corinth  
    Vicksburg National Military Park, 2015  
Visit Mississippi, 2015.

## Appendix C

### Estimated Travel and Tourism Expenditures by Visitors, FY2014 and FY2015

CATEGORY	FY2014	FY2015	CHANGE
Food Services and Drinking Places (1)	\$1,254,491,656	\$1,281,700,632	2.2%
Lodging (2)	812,060,804	837,120,438	3.1%
Gaming (3)	1,432,358,745	1,428,867,646	-0.2%
All Retail, excluding Gasoline/Service Stations (4)	1,639,176,063	1,658,776,181	1.2%
Gasoline/Service Stations, Convenience Stores, Fuel	780,857,602	712,963,709	-8.7%
Fixed Facilities, Air Transportation (5)	13,127,580	12,066,112	-8.1%
Passenger Car Rental Leasing	27,827,620	31,450,145	13.0%
Auto Repair Shops, Accessories, Mechanics, Car Wash	71,334,036	55,265,291	-22.5%
Rail and Water Passenger Transportation (6)	11,579,057	10,929,551	-5.6%
Entertainment/Athletic Events/Outdoor Recreation (7)	36,570,572	68,093,161	86.2%
Consumer Goods Rental	NA	60,923,662	NA
Advertising Specialties	1,218,862	1,271,934	4.4%
Printing and Publishing	1,863,966	1,601,157	-14.1%
Laundries, Dry Cleaning	4,103,350	5,420,504	32.1%
<b>Total</b>	<b>\$6,086,569,913</b>	<b>\$6,166,450,123</b>	<b>1.3%</b>

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

This Appendix Includes:

1. Includes all restaurants, drinking places, vending machines, specialty food and liquor stores.
2. The FY2014 and 2015 lodging figures reflected some adjustments, based on Smith Travel Research monthly survey data for Mississippi cities/regions. Appendix C includes 83rd Division data not attributable to a particular county or city.
3. Net travel/visitor gross gaming revenues for 29 state-licensed casinos in FY2014 and 28 in FY 2015.
4. Includes department and general merchandise stores, warehouse clubs-supercenters; apparel and accessories; miscellaneous retail; gift, novelty and souvenir; sporting goods, book and musical instrument stores; electronics, camera and photographic stores; antique (used merchandise) stores; cigar stores and stands; drug stores; gaming retail; specialty food, liquor stores, supermarkets and grocery stores; RV dealers, motorcycle, boat and other motor vehicle dealers; jewelry, florists; pharmacies; drugstores and tobacco stores; automotive parts and accessories stores; tire dealers. Excludes gasoline and diesel fuel at 18 cents per gallon; gasoline service stations/convenience stores.
5. Air transportation, air terminal, transportation services. Includes gross airport non-operating revenues for FY2014 and FY2015, based on scheduled/charter passenger service and passenger facility charges.
6. Amtrak ticket sales included for both FY2014 and FY2015.
7. The entertainment/recreation component includes: motion picture theaters; museums; spectator sports; racetracks; zoos and botanical gardens; amusement and theme parks; golf courses; bowling centers; marinas; all other amusement and recreation industry. The FY2015 data included university sporting events ticket sales to persons residing at 50 miles or more, one-way, from the athletic venue.

SOURCES: American Automobile Association Web Site, 2015.

Amtrak Station Revenue e-searches, 2015.

Department of Revenue, 2015.

Mississippi Department of Wildlife, Fisheries & Parks, 2015.

Mississippi Development Authority Energy Division, 2015.

Mississippi Gaming Commission, 2015.

Smith Travel Research monthly survey data for Mississippi cities/regions, 2015.

U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg Headquarters, 2015.

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

Mississippi Final Stands Interpretive Center

Natchez National Historical Park

Shiloh National Military Park/Corinth Site

Vicksburg National Military Park, 2015.

Visit Mississippi, 2015.

## Appendix D

### Estimated Travel and Tourism General Fund Revenues, FY2014 and FY2015

CATEGORY	FY2014	FY2015	CHANGE
Food Services and Drinking Places	\$52,964,660	\$53,818,996	1.6%
Lodging (1)	32,997,090	35,143,901	6.5%
State-Licensed Casino Gaming (2)	87,654,811	89,861,241	2.5%
All Retail, Including Gasoline Service Stations (3)	76,720,374	69,097,452	-9.9%
Rental and Leasing, Other Transportation (4)	1,329,189	1,500,000	12.9%
Auto Repair Shops, Accessories, Mechanics, Car Wash	3,253,809	2,335,247	-28.2%
Entertainment/Outdoor Recreation (5)	1,509,988	2,182,094	44.5%
Advertising Specialties	56,636	53,443	-5.6%
Printing and Publishing	84,825	66,906	-21.1%
Laundries, Dry Cleaning	180,590	226,180	25.2%
Construction Activity Tax (6)	7,332,291	7,242,136	-1.2%
Personal Income/Sales Tax (7)	104,112,333	101,403,918	-2.6%
Alcoholic Beverages (8)	NA	15,925,423	NA
Use Tax (9)	9,835,367	9,811,547	-0.2%
Beer and Wine Tax (10)	9,936,550	NA	NA
<b>Total</b>	<b>\$387,968,513</b>	<b>\$388,668,484</b>	<b>0.2%</b>

**This Appendix Includes:**

1. Statewide and city data from Smith Travel Research were used for this estimate.
2. Approximately \$89.9 million, or 68.5 percent of the \$131.3 million in General Fund gaming fees and tax transfers, were the "net" travel and tourism portion. The other \$41.4 million, or 31.5 percent, were not attributed to travel and tourism. This does not include \$36 million allocated to MDOT's Bond Sinking Fund, \$3 million per month.
3. Includes department and general merchandise stores, warehouse clubs-supercenters; apparel and accessories; miscellaneous retail; gift, novelty and souvenir; sporting goods, book and musical instrument stores; camera and photographic stores; antique (used merchandise) stores; cigar stores and stands; drugstores; gaming retail; gasoline and diesel fuel at 18 cents; gasoline service stations/convenience stores; specialty foods, liquor stores, supermarkets and grocery stores; RV dealers, motorcycle, boat and other motor vehicle dealers; jewelry, florists; pharmacies, drugstores and tobacco stores; automotive parts and accessory stores; tire dealers.
4. Also includes: transportation services, fixed facilities-air transportation, water passenger transportation.
5. The entertainment/recreation component includes: motion picture theaters; museums; spectator sports; racetracks; zoos and botanical gardens; amusement and theme parks; golf courses; bowling centers; marinas; all other amusement and recreation industry;
6. The estimated travel and tourism-related portion of the General Fund based on Tourism Capital Investment.
7. The estimated travel and tourism-related portion of the General Fund amount, based on estimated effective tax rates for personal income, sales tax and all other taxes.
8. The FY2015 estimate comprised 88.2 percent of the total transfers to the General Fund and also applying a travel and tourism factor.
9. The FY2015 estimate comprised 77 percent of the total transfers to the General Fund and also applying a Travel and Tourism factor.
10. None of the beer and wine tax general fund receipts are diverted to cities/counties. Alcoholic Beverages data were used in FY2015.

NOTE: All dollar amounts are the estimated "net" travel and tourism portion.

SOURCES: Department of Revenue, 2015.  
 Mississippi Department of Employment Security, Labor Market Information Department, 2015.  
 Mississippi Development Authority Energy Division, 2015.  
 Smith Travel Research monthly survey data for Mississippi cities/regions, 2015.  
 University Research Center, Mississippi Public Universities, 2015.  
 Visit Mississippi, 2015.

## Appendix E

### Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY2014

County	Travel and Tourism Expenditures by Visitors ***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Adams	\$107,977,297	2,275	20.5	\$10,917,138	\$2,013,260
Alcorn	54,570,046	760	5.5	3,793,920	1,219,359
Amite	1,682,569	25	1.7	134,957	109,089
Attala	15,154,462	215	4.6	1,130,468	709,717
Benton	824,504	12	0.9	82,718	100,847
Bolivar	39,393,783	585	5.0	3,448,433	7,912,478
Calhoun	1,720,604	28	1.0	161,169	1,067,643
Carroll	839,931	12	1.1	77,245	11,731
Chickasaw	4,719,723	70	1.2	380,402	98,557
Choctaw	933,433	14	0.7	99,912	0
Claiborne	2,387,453	40	1.2	228,604	397,804
Clarke	4,243,067	57	1.8	340,957	456,295
Clay	17,014,608	240	4.7	1,386,417	0
Coahoma	66,593,466	950	11.9	6,596,617	97,905
Copiah	6,872,726	100	1.4	533,296	964,441
Covington	8,379,761	118	2.5	664,109	489,968
DeSoto	300,224,209	3,850	7.5	26,312,399	17,407,595
Forrest ^	258,299,094	4,065	7.0	22,384,235	11,810,605
Franklin	1,152,924	17	1.1	118,845	173
George	8,244,261	116	2.5	588,035	356,575
Greene	1,571,544	21	1.1	151,645	1,213
Grenada	45,129,570	730	7.1	3,541,153	1,561,790
Gulf Coast**	1,809,677,766	24,460	15.7	199,523,060	97,455,354
Hinds	385,135,447	7,025	5.2	36,556,769	16,580,985
Holmes	2,972,898	45	1.3	261,139	147,686
Humphreys	993,775	15	0.7	107,895	44,750
Issaquena	171,071	3	1.8	14,357	120,867
Itawamba	10,876,028	155	2.7	951,292	458,949
Jasper	2,703,979	40	1.0	249,862	951,074
Jefferson	1,058,977	14	1.0	110,211	121,000
Jefferson Davis	2,206,224	32	1.8	185,395	218,422
Jones	60,245,116	860	2.9	5,340,308	2,182,819
Kemper	1,646,456	23	0.4	157,217	582
Lafayette	123,505,661	1,640	8.0	10,595,136	10,728,354
Lamar ^					^
Lauderdale	166,769,162	2,040	6.1	14,129,893	7,174,249

## Appendix E (continued)

County	Travel and Tourism Expenditures by Visitors ***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Lawrence	2,587,007	35	1.4	212,927	114,643
Leake	8,561,929	120	3.1	647,722	174,840
Lee	250,693,256	3,820	7.3	22,016,764	5,847,249
Leflore	48,970,873	740	5.5	3,672,382	296,378
Lincoln	28,492,304	395	3.6	2,293,716	263,857
Lowndes	100,327,747	1,430	5.3	9,316,192	5,090,832
Madison	200,275,058	2,750	5.4	16,406,406	15,083,716
Marion	12,185,976	155	2.0	896,942	166,725
Marshall	15,951,405	215	3.8	1,343,018	6,118,071
Monroe	16,835,234	230	2.3	1,283,440	473,183
Montgomery	10,783,546	150	6.1	878,286	13,647
Neshoba #	28,658,945	1,925	15.6	2,688,893	36,048,640
Newton	6,832,095	90	1.5	489,100	46,880
Noxubee	3,390,034	45	1.9	289,669	823,264
Oktibbeha	86,031,191	1,175	5.6	7,781,204	13,276,062
Panola	43,434,359	600	5.5	3,452,627	1,247,098
Pearl River	28,460,534	395	3.9	2,402,883	394,723
Perry	1,696,359	25	1.2	153,108	79,531
Pike	40,097,543	550	4.0	3,694,304	1,210,698
Pontotoc	9,346,593	120	1.0	683,358	94,019
Prentiss	8,057,486	105	1.5	581,508	137,240
Quitman	1,104,693	15	1.5	113,106	366,448
Rankin	241,879,734	3,300	5.3	23,333,697	20,864,093
Scott	18,327,861	245	2.0	1,394,195	1,945,331
Sharkey	938,361	14	1.3	85,303	0
Simpson	19,241,655	260	3.4	1,562,785	135,780
Smith	1,904,564	27	0.9	127,644	0
Stone	10,201,903	135	3.4	806,044	223,473
Sunflower	13,457,056	182	2.1	1,146,856	891,455
Tallahatchie	1,517,266	25	0.8	150,812	345,542
Tate	9,423,896	130	2.4	732,482	2,789,681
Tippah	6,915,800	95	1.7	549,406	188,914
Tishomingo	14,023,565	195	3.6	1,153,154	985,178
Tunica	600,171,744	7,500	71.6	77,374,241	593,994
Union	19,098,120	260	2.5	1,763,764	1,473,109
Walthall	2,262,944	33	1.3	220,498	3,448
Warren	205,337,490	4,000	19.1	21,669,175	1,645,762
Washington	85,903,112	1,465	8.5	8,582,751	929,837

Appendix E (continued)

County	Travel and Tourism Expenditures by Visitors ***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Wayne	8,135,660	110	2.2	613,442	14,239
Webster	1,769,620	25	1.3	158,914	2,673
Wilkinson	2,682,718	40	2.2	251,509	24,080
Winston	11,931,823	200	4.4	904,308	136,150
Yalobusha	3,291,328	47	1.5	273,034	1,289,409
Yazoo	14,806,661	200	3.2	1,428,315	242,077
Other*	324,681,270			43,045,246	
<b>Total</b>	<b>\$6,086,569,913</b>	<b>84,225</b>	<b>7.5</b>	<b>\$619,880,338</b>	<b>\$305,064,105</b>

\* Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the non-resident license sales by the Department of Wildlife, Fisheries & Parks (under fees) and use taxes. Sales and tax collections for the 83rd Division, not traced to specific counties, are included. Appendix E has estimated travel and tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

# Neshoba County employment figures do reflect estimated Pearl River Resort employment – rough estimate – from separate sources. Pearl River Resort travel and tourism expenditures by visitors was not available. Estimated Tourism Capital Investment is based on data from sources responding to the survey.

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

\*\* Gulf Coast reflects combined data for Hancock, Harrison and Jackson Counties.

\*\*\* These are nominal dollar amounts not adjusted for inflation. The Department of Revenue began using NAICS codes with September 2013 sales and collections.

\*\*\*\* The travel and tourism employment percentage equals the estimated direct tourism jobs divided by the county level establishment based nonfarm employment. Data are based on where the employees work, not where they reside.

\*\*\*\*\* Estimated state and local travel and tourism taxes from travel/visitor expenditures and other activity. Includes 7-percent sales tax and 18.5 percent portion allocated to cities; state-licensed casinos; seawall and city-county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees and excise taxes; beer/wine taxes; use taxes; TCI local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices.  
 County Tax Assessors and Collectors.  
 Department of Revenue, 2014.  
 McGraw-Hill Construction/Dodge.  
 Mississippi Department of Employment Security, Labor Market Information Department.  
 Mississippi Department of Finance and Administration, Bureau of Buildings & Real Property Management.  
 Mississippi Department of Transportation.  
 Mississippi Department of Wildlife, Fisheries & Parks.  
 Mississippi Gaming Commission, 2014.

## Appendix F

### Estimated County Travel and Tourism Expenditures, Employment, Taxes, Total Capital Investment, FY2015

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Adams	\$114,660,317	2,300	20.4	\$11,884,763	\$2,027,813
Alcorn	56,391,847	770	5.5	4,605,026	1,463,166
Amite	2,035,909	28	1.7	192,712	450,747
Attala	16,697,705	230	4.9	1,236,689	841,169
Benton	809,724	12	0.9	77,045	215,537
Bolivar	43,737,304	600	5.2	3,997,815	1,793,342
Calhoun	3,433,332	45	1.5	286,954	565,854
Carroll	599,208	9	0.8	59,659	11
Chickasaw	5,571,694	75	1.4	440,553	253,397
Choctaw	717,803	10	0.6	70,707	24,510
Claiborne	2,950,853	42	1.3	275,244	337,023
Clarke	4,218,048	60	2.0	341,757	96,328
Clay	18,727,485	260	5.1	1,574,801	44,000
Coahoma	67,864,898	960	12.0	7,468,055	1,143,051
Copiah	7,964,169	110	1.5	606,039	701,384
Covington	9,831,893	135	2.7	782,743	390,351
DeSoto	305,731,363	4,140	7.5	26,873,037	11,698,615
Forrest ^	268,054,502	4,135	7.1	23,302,096	10,661,957
Franklin	1,198,517	17	1.1	123,158	325,952
George	10,071,450	140	2.6	750,219	61,939
Greene	2,011,621	27	1.4	188,734	96,738
Grenada	48,474,598	745	7.1	4,150,025	179,082
Gulf Coast**	1,882,172,688	25,025	16.4	210,926,482	172,155,260
Hinds	364,054,770	7,000	5.3	35,968,967	16,345,188
Holmes	3,522,298	48	1.3	323,017	391,750
Humphreys	2,294,482	30	1.5	205,581	0
Issaquena	179,478	3	1.9	16,198	190
Itawamba	14,849,503	200	3.2	1,259,055	0
Jasper	3,272,024	45	1.2	281,277	2,343,134
Jefferson	978,645	14	1.0	103,472	199,834
Jefferson Davis	2,553,326	35	2.2	228,422	19,611
Jones	60,293,013	860	2.9	5,334,694	2,298,257
Kemper	1,671,432	23	0.5	167,343	0
Lafayette	134,829,080	1,800	8.4	11,517,106	16,694,786
Lamar ^					^
Lauderdale	165,835,067	2,070	6.0	14,482,854	456,845

## Appendix F (continued)

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Lawrence	2,862,987	37	1.5	242,879	143,032
Leake	8,447,235	120	2.5	668,974	119,909
Lee	253,044,996	3,860	7.4	22,338,391	5,053,383
Leflore	49,457,745	740	5.4	3,739,912	1,963,407
Lincoln	36,987,309	500	4.4	3,030,527	593,876
Lowndes	115,619,629	1,530	6.0	10,388,772	2,274,841
Madison	223,063,201	2,900	5.3	18,285,512	7,670,636
Marion	12,438,652	155	2.0	939,206	864,775
Marshall	15,177,579	215	3.6	1,254,382	6,021,517
Monroe	16,976,463	235	2.4	1,314,794	1,001,165
Montgomery	10,747,345	150	5.9	925,360	20,352
Neshoba #	36,691,282	2,000	16.0	2,826,677	427,114
Newton	6,750,804	90	1.5	487,740	428,729
Noxubee	5,420,669	72	2.9	438,984	237,316
Oktibbeha	93,477,550	1,300	6.1	8,677,641	1,201,973
Panola	45,432,360	630	5.7	3,762,526	1,556,035
Pearl River	29,533,122	400	4.0	2,508,240	96,525
Perry	2,443,427	33	1.6	219,543	255,244
Pike	43,827,314	600	4.1	4,003,061	231,870
Pontotoc	10,174,083	125	1.0	788,193	799,494
Prentiss	7,952,658	105	1.4	602,548	45,236
Quitman	1,072,926	15	1.4	110,415	294,912
Rankin	242,756,037	3,360	5.2	23,502,120	7,263,400
Scott	20,424,301	275	2.2	1,567,906	1,121,961
Sharkey	2,289,472	30	2.7	146,457	0
Simpson	21,383,435	280	3.6	1,617,790	430,357
Smith	2,084,831	28	1.0	169,301	13,224
Stone	12,433,091	170	4.4	996,616	332,468
Sunflower	14,017,398	190	2.3	1,199,307	3,772,330
Tallahatchie	2,039,008	28	0.9	194,366	540,482
Tate	10,808,749	145	2.6	907,031	429,410
Tippah	7,724,366	105	1.8	670,422	21,294
Tishomingo	15,825,458	210	3.7	1,292,095	814,328
Tunica&	586,802,764	6,100	67.9	76,245,246	1,981,168
Union	21,216,933	280	2.7	1,939,009	1,333,397
Walthall	2,118,110	30	1.2	220,188	0
Warren	201,808,459	3,940	19.1	21,593,166	1,493,133
Washington	88,556,616	1,480	8.5	9,518,820	2,264,424

Appendix F (continued)

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Wayne	8,437,151	112	2.3	649,659	180,839
Webster	2,566,089	35	1.8	218,611	92,104
Wilkinson	3,127,805	45	2.7	274,658	144,426
Winston	16,080,434	225	5.0	1,247,405	15,053
Yalobusha	3,509,732	48	1.5	288,838	541,958
Yazoo	14,858,365	204	3.2	1,384,980	915,256
Other*	209,722,137			22,585,315	
<b>Total</b>	<b>\$6,166,450,123</b>	<b>85,135</b>	<b>7.6</b>	<b>\$626,085,882</b>	<b>\$299,279,174</b>

\* Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the non-resident license sales by the Department of Wildlife, Fisheries & Parks (under fees) and use taxes. Sales and tax collections for the 83rd Division, not traced to specific counties, are included. Appendix F has estimated travel and tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

# Neshoba County employment figures do reflect estimated Pearl River Resort employment – a rough estimate – from separate sources. Pearl River Resort travel and tourism expenditures by visitors was not available. Estimated Tourism Capital Investment is based on data from sources responding to the survey.

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

\*\* Gulf Coast reflects combined data for Hancock, Harrison and Jackson Counties.

& Tunica County FY2015 employment data reflect 12 full months post-resort closing.

\*\*\* These are nominal dollar amounts not adjusted for inflation. The Department of Revenue began using NAICS codes with September 2013 sales and collections. Appendix F reflects July 2014-June 2015 data.

\*\*\*\* The travel and tourism employment percentage equals the estimated direct tourism jobs divided by the county level establishment based nonfarm employment. Data are based on where the employees work, not where they reside. Travel and tourism employment estimates are lower than the leisure & hospitality figures.

\*\*\*\*\* Estimated state and local travel and tourism taxes from travel/visitor expenditures and other activity. Includes 7-percent sales tax and 18.5-percent portion diverted to cities; state-licensed casinos; seawall and city-county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees and excise taxes; beer/wine taxes; use taxes; TCI local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES: Chambers of Commerce and other Economic Development and Tourism Offices.  
 County Tax Assessors and Collectors.  
 Department of Revenue, 2015.  
 Dodge Data Analytics, 2015.  
 Mississippi Department of Employment Security, Labor Market Information Department.  
 Mississippi Department of Finance and Administration, Bureau of Buildings & Real Property Management.  
 Mississippi Department of Transportation.  
 Mississippi Department of Wildlife, Fisheries & Parks.  
 Mississippi Gaming Commission, 2015.

## Appendix G

Estimated Hotel/Motel Room Count, CY2014/CY2015

County	Hotel/Motel Rooms (12-31-14)	Hotel/Motel Rooms (12-31-15)	Percentage Change
Adams	1,140	1,014	-11.1%
Alcorn	378	378	none
Amite	0	0	NA
Attala	130	130	none
Benton	0	0	NA
Bolivar	426	460	8.0%
Calhoun	26	19	-26.9%
Carroll	0	0	NA
Chickasaw	52	52	none
Choctaw	0	0	NA
Claiborne	44	45	2.3%
Clarke	20	25	25.0%
Clay	207	208	none
Coahoma	920	932	1.3%
Copiah	167	155	-7.2%
Covington	93	93	none
DeSoto	2,734	2,902	6.1%
Forrest*	2,356	2,710	15.0%
Franklin	0	0	NA
George	151	129	-14.6%
Greene	0	0	NA
Grenada	758	631	-16.8%
Gulf Coast#	13,143	14,094	7.2%
Hinds	5,644	5,582	-1.1%
Holmes	54	40	-25.9%
Humphreys	60	30	-50.0%
Issaquena	0	0	NA
Itawamba	165	133	-19.4%
Jasper	26	27	3.8
Jefferson	0	0	NA
Jefferson Davis	40	30	-25.0%
Jones	732	833	13.8%
Kemper	32	32	none
Lafayette	789	925	17.2%
Lamar*			*
Lauderdale	1,969	1,992	1.2%
Lawrence	30	30	none

## Appendix G (continued)

County	Hotel/Motel Rooms (12-31-14)	Hotel/Motel Rooms (12-31-15)	Percentage Change
Leake	56	57	1.8%
Lee	1,913	1,886	-1.4%
Leflore	825	825	none
Lincoln	486	487	0.2%
Lowndes	1,168	1,256	7.5%
Madison	2,306	2,305	none
Marion	120	191	59.2%
Marshall	203	190	-6.4%
Monroe	247	212	-14.2%
Montgomery	215	216	0.5%
Neshoba	1,562	1,551	-0.7%
Newton	103	87	-15.5%
Noxubee	64	64	none
Oktibbeha	779	873	12.1%
Panola	563	579	2.8%
Pearl River	401	267	-33.4%
Perry	0	0	NA
Pike	636	607	-4.6%
Pontotoc	56	56	none
Prentiss	80	100	25.0%
Quitman	0	0	NA
Rankin	2,488	2,489	none
Scott	221	221	none
Sharkey	19	19	none
Simpson	249	230	-7.6%
Smith	33	32	-3.0%
Stone	184	184	none
Sunflower	203	203	none
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	70	77	10.0%
Tishomingo	130	113	-13.1%
Tunica	4,705	4,721	0.3%
Union	349	344	-1.4%
Walthall	30	30	none
Warren	2,309	2,217	-4.0%
Washington	1,163	1,172	0.8%
Wayne	129	129	none
Webster	48	47	-2.1%
Wilkinson	18	18	none

Appendix G (continued)

County	Hotel/Motel Rooms (12-31-14)	Hotel/Motel Rooms (12-31-15)	Percentage Change
Winston	213	243	14.1%
Yalobusha	20	20	none
Yazoo	225	225	none
Total	57,006	58,305	2.3%

Appendix G does not include bed-and-breakfast rooms, hotel/motel rooms under construction January-March 2016, cabins, or condo/timeshare/cottage rooms. County room counts are based on figures provided by various sources. A different official may have furnished the data between one year and the next. Smith Travel inventory data were used for 2014-2015 updates. Some counties had room inventory changes: closings, additions or renovations.

Smith Travel lodging inventory as of December 31, 2015: 683 hotels/motels and 58,295 rooms. Smith Travel lodging inventory as of December 31, 2014: 675 hotels/motels and 56,985 rooms.

# Gulf Coast is the combined Hancock plus Harrison plus Jackson Counties.

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

SOURCES: Mississippi Chambers of Commerce, economic development offices, cities, convention and visitor bureaus, tourism offices and other local entities; Smith Travel Research, Inc. Hendersonville, Tennessee, 2014-2016.

## 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: Visit Mississippi, 2015.



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