

Fiscal Year 2004 Economic Impact

For

Tourism In Mississippi

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Abstract

This report's purpose is to estimate Tourism's economic impact data at the state and county level for FY 2004. Tourism is vital to Mississippi's economy, based on these **estimates**:

- Tourism accounted for 92,400 direct jobs in FY 2004, based on quarterly employment figures. Approximately 90,975 of these jobs, or 98.5 percent, were private sector ones.
- The 92,400 direct jobs were 8.3 percent, or 1/12 of the total statewide nonagricultural establishment-based employment in FY 2004.
- FY 2004 Tourism annual payroll for the 92,400 direct jobs was \$1.7 billion.
- The 92,400 direct jobs were 1.0 percent more than the 91,500 direct jobs for FY 2003.
- Tourism expenditures were \$6.1 billion in FY 2004, a 6.6 percent increase over FY 2003.
- Tourism's proportion of Mississippi's FY 2004 General Fund—about \$363 million of the \$3.5 billion General Fund—was 10.3 percent, or \$1 of every \$10.
- The \$363 million in FY 2004 General Fund Tourism Revenues reflected a 5.8 percent increase over the \$343 million in FY 2003 General Fund Tourism Revenues.
- Tourism State tax revenues totaled \$471 million in FY 2004, a 4.6 percent increase versus FY 2003. The “spread” between the direct sales increase and the State tax revenue increase is due to different tax levels for gasoline, casino gaming taxes and other factors.
- The \$471 million in FY 2004 Tourism State tax revenues comprised 8.4 percent of the \$5.6 billion in total FY 2004 State tax collections, or \$1 of every \$12.
- FY 2004 City/County Tourism tax revenues (Room/Restaurant, Gaming and Seawall Tax) were \$152.3 million, a 5.7 percent increase over FY 2003 levels.

- Estimated Return on Investment (ROI) for the State's Domestic Consumer Ad Placement and Production Costs were \$13 in FY 2003 and \$13 in FY 2004.
- The number of statewide hotel/motel rooms remained flat from 54,110 in FY 2003 to 54,027 in FY 2004. So did the number of statewide hotels/motels with 618 as of June 30, 2003 to 617 as of June 30, 2004. Some properties reduced their total number of rooms.
- An estimated 84,000 tourists/visitors per day—person-trips—(overnight leisure, leisure day-trip and business travelers), on average, visited Mississippi in FY 2004.
- About 84 percent of the 11.4 million overnight leisure visitors to Mississippi in FY 2004 were from out-of-state. The 11.4 million overnight leisure visitors comprised 37 percent of the nearly 31 million total visitors, including leisure day-trip and business travelers.
- The Tourism Industry Group ranks 5th in total estimated FY 2004 employment, based on **all** the sectors of Mississippi's economy.
- The Tourism Industry Group ranks 1st with more estimated private sector jobs than any other Sub-Sector or Industry Group in Mississippi (10.4 percent, or 1 of every 10), per the definitions of selected terms on pages xi and xii. And it is the state's second largest private service sector employer.
- Estimated FY 2004 Tourism Capital Investment, based on available information, was \$440.8 million. Nearly ½ of this amount (about 48 percent) comprised casino-related development, including hotels, restaurants and other casino-related amenities.

The estimated FY 2004 Tourism direct sales, General Fund Tourism revenues and State tax revenues cited on page v includes leisure dollars from Mississippi tourists/visitors as well as some non-tourists/visitors.

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Delimitations and Limitations

Delimitations

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

Limitations

This study should be interpreted only for Mississippi. The study may be limited by the challenges of providing a comprehensive and local view of Tourism spending. In other words, Tourism businesses cover a broad range of North American Industry Classification System (NAICS) codes. Thus, assumptions were made for certain employment and revenue categories based on their Tourism links. These assumptions may be adjusted in light of future research.

The study is limited by not having access to automotive gasoline sales for 79 of the state's 82 counties so this reporting and distribution system precludes gathering unleaded, mid-grade and premium gasoline sales at the local level. The State Tax Commission's Petroleum Tax Division provides disbursements for the Hancock, Harrison and Jackson County Seawall Tax. This facilitates revenue figures for these three counties based on the net taxable gallons sold.

This study does not use state or county level multipliers. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties, cities and municipalities. Limitations at the county level include the difficulty in assigning percent figures in terms of tourists/visitors, e.g., a coastal county whose restaurants may cater to a clientele where tourists/visitors comprise 3/4 of the patrons or another county where tourists/visitors comprise only 15 percent of the restaurant customers.

Definition of Selected Terms

Balance of Trade: Spending by inbound out-of-state travelers (exports) minus spending by Mississippi residents in other states (imports).

Establishment-Based Employment: Nonagricultural employment at the state/county level.

Fiscal Year: For purposes of this study, the fiscal year is July 2003 – June 2004.

Gross Gaming Revenues: Net gains realized by a casino after payment of all cash paid out as losses to patrons and those amounts paid to purchase annuities to fund losses paid to patrons over several years by independent financial institutions.

Gross Tourist/Visitor Sales and Tax Revenues: The estimated tourism-related sales and tax revenues without removing the estimated local components of the estimated gross sales (Tourist/Visitor expenditures) and tax revenues.

Industry Group: Per NAICS codes, this is the four-digit category under a Sub-Sector, e.g., 3118 Bakeries & Tortilla Manufacturing under 311 Food Manufacturing and 4521 Department Stores under 452 General Merchandise Stores.

Mississippi Tourism Model: This combination of the Travel Economic Impact Model and Tourism Development Simulation Model best reflects a rural state with coastal counties.

Net Tourist/Visitor Sales and Tax Revenues: The estimated portion of tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales (Tourist/Visitor expenditures) and tax revenues.

North American Industry Classification System (NAICS) Codes: Two-to-six digit codes specified by the 1997 NAICS/SIC Code United States Manual which reflect diverse private and public sector categories. NAICS, organized in a hierarchical structure, classifies establishments by type of economic activity.

Sector: Per NAICS codes, this is the broad two-digit category, e.g., 31 - 33 Manufacturing; 44 - 45 Retail Trade; and 62 Health Care & Social Assistance. NAICS has 20 sectors.

Standard Industrial Classification (SIC) Codes: Two-to-four digit codes specified by the 1987 Standard Industrial Classification Manual which reflect a broad variety of business and public sector categories from lodging to transportation, among many others.

Sub-Sector: Per NAICS codes, this is the three-digit category under a Sector, e.g., 311 Food Manufacturing under 31 Manufacturing; 447 Gasoline Service Stations under 44 Retail Trade; and 622 Hospitals under 62 Health Care & Social Assistance.

Tourism: The science, art, and business of attracting and transporting visitors, accommodating them and graciously catering to their needs and wants.

Tourism Capital Investment: New construction and expansion/renovation of Tourism-related businesses/projects with public and private funding sources during a given fiscal year.

Tourism Development Simulation Model (TDSM): Major categories include lodging facilities, eating/drinking establishments, transportation services, other commercial services and public service. This model enables users to modify or verify tourism expenditure parameters as they change over time.

Tourism Industry Group: Three-to-six digit categories comprising Food Services & Drinking Places, Gasoline Stations, Hotels & Motels, among other Sub-Sectors and Industries.

Tourist/Visitor: Person/Travel Party making a 100-mile or more round trip from their primary home to enjoy the history, scenery and attractions of another community.

Travel Economic Impact Model (TEIM): Developed and operated by the U.S. Travel Data Center, it estimates the economic impact of U.S. residents traveling in the U.S. only. It covers NAICS codes and examines round trips of 100 miles or more.

INTRODUCTION

The Mississippi Development Authority(MDA)/Tourism Division is appreciative of \$6.5 million in FY 2004 and \$6.0 million in FY 2005 funding. Mississippi's executive and legislative branches have recognized that Tourism is a driving force in the state's economic development efforts. And these efforts have paid dividends.

Tourism's visibility throughout Mississippi is at an all-time high. Forty-seven local entities with a Room and/or Restaurant Tax were in place as of December 2004. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism, a \$593 billion U.S. industry with over 7 million direct jobs per the Travel Industry Association, is a vital component of the state's economic development engine. Tourism's emergence throughout Mississippi has brought respect and attention to this industry.

Mississippi's economy reflected a FY 2004 unemployment rate of 5.7 percent, based on a 12-month average. The state had a civilian labor force of 1,313,900, with an average of 74,300 unemployed persons throughout FY 2004. Metropolitan Statistical Areas (MSAs) for certain counties with a significant Tourism industry had much lower FY 2004 unemployment rates than the state average, as follows: 4.1 percent for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 5.2 percent for Pascagoula (Jackson and George counties); 4.1 percent for Hattiesburg (Forrest, Lamar and Perry counties); and 3.8 percent for Jackson (Hinds, Madison and Rankin counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, taken together, form a consolidated MSA. This consolidated MSA had a 4.3 percent unemployment rate in FY 2004. Memphis's MSA includes De Soto and Tunica Counties, but much of their MSA data reflect Tennessee county figures; therefore, available unemployment statistics are not comparable.

METHODS

The purpose of this report was to estimate Tourism jobs, payroll, sales (expenditures) and State tax revenue—including the General Fund portion—plus City/County (local) tax revenue for FY 2004. Other trends, e.g., motorcoach information, Visitor Profile data, Highway Welcome Center highlights, will also be presented. Certain agencies, such as federal entities, have an October to September FY and some data reflects that period. Most of Mississippi's Convention and Visitor Bureaus are on an October-September FY as well, but the State Tax Commission compiles tax revenue information for these entities on a monthly and state FY basis.

The State Tax Commission provided the majority of the statewide and county revenue figures via Standard Industrial Classification (SIC) Codes. They facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation and attractions/entertainment/recreation information through computer printouts.

Food and beverage components included restaurants (non-alcohol and alcohol serving), quick stop groceries a.k.a. convenience stores, concessions quick food and bar and beer parlors. Lodging information was gleaned from hotels/motels, campgrounds and bed and breakfasts. Retail establishments comprised department and general merchandise stores, used merchandise stores, clothing and shoe stores, sporting goods stores, tobacco (cigar stores and stands) stores, camera/photographic stores and gift/novelty/souvenir shops. Mississippi's State Tax Commission compiles monthly sales and tax collections figures for these establishments. The Mississippi State Tax Commission, Petroleum Tax Division furnished transportation-related figures.

The Mississippi Department of Wildlife, Fisheries and Parks provided hunting/fishing licensing fees and state park jobs/revenues. Officials representing the Natchez National Historical Park and the Vicksburg National Military Park supplemented this information at the federal level. The Vicksburg headquarters and Columbus office of the U.S. Army Corps of Engineers furnished FY 2004 federal park revenue and employment data.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the Mississippi Department of Employment Security, Labor Market Information (LMI) Department, through monthly averages by NAICS code from July 2003 through June 2004. FY 2004 Gaming jobs and payroll data were secured from the Mississippi Gaming Commission quarterly surveys.

The proportion of statewide income attributed to Tourism is included by category. A 78 percent factor was used for State-Licensed Casinos, based on input from the Mississippi Gaming Association (MGA). Net Tourist/Visitor Sales Tourism factors for the retail sector included 14 percent at department stores. Statewide petroleum purchases at the retail level received a 20 percent factor. Statewide revenue figures for these purchases were calculated via self-service unleaded gas price averages for regular, mid-grade and premium fuel reported by AAA's web site. Sources for information on sales of petroleum products into Mississippi were MDA/Energy Division, the Mississippi State Tax Commission and the Mississippi Department of Transportation (MDOT). The Petroleum Tax Division of the Mississippi State Tax Commission provided sales and collections data for gasoline at 18 cents and undyed diesel fuel at 18 cents.

Income by county was presented using estimated factors by Tourism category. Various tourism-related indicators were provided for those counties whose economies are more geared to tourists/visitors through motorcoach surveys, gaming-related statistics and other parameters.

FINDINGS

Gaming, Restaurant and Lodging jobs were the top three terms of FY 2004 direct Tourism Employment, in Mississippi, based on Appendix A. Total estimated FY 2004 nongaming jobs were 68.1 percent of all FY 2004 Tourism Employment. The 29,500 gaming jobs, excluding casino hotels, represented 31.9 percent of FY 2004 direct Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY 2003 and FY 2004. Appendix B shows FY 2003 and FY 2004 payroll-related information by employment component. Estimated Tourism expenditures were \$6.1 billion in FY 2004, per Appendix C. FY 2003 and FY 2004 estimated State Tourism tax revenues are Appendix D. These estimated tax revenues totaled \$471 million in FY 2004, or 8.4 percent of the \$5.6 billion in total FY 2004 State tax collections. About \$363 million of the \$471 million in FY 2004 State tax revenues, or 77 percent, went into the FY 2004 General Fund while \$108 million (23 percent) was diverted, e.g., Petroleum Tax revenue from gasoline sales and Gaming taxes, per Appendix E. Tourism's \$363 million portion of the FY 2004 General Fund was 10.3 percent.

Appendix F presents estimated FY 2004 employment data by sector, e.g., Government, Manufacturing and Retail Trade. Ditto for the Tourism Industry Group employment data.

Appendix G has estimated FY 2004 county level Tourism Revenues, direct Tourism Employment, the countywide establishment-based, nonagricultural employment figure, the Tourism employment proportion and some Capital Investment data. The estimated 92,400 direct Tourism jobs in FY 2004 were 8.3 percent, or 1/12, of all statewide nonagricultural employment.

Appendix H groups the 54,027 statewide hotel/motel rooms in FY 2004 by county, per an MDA/Tourism Division Lodging Census, as well as data provided by Smith Travel Research. The number of statewide hotel/motel rooms remained constant in FY 2003 and FY 2004.

TRANSPORTATION

Highway Welcome Center statistics, motorcoach data and Visitor Profile trends are highlighted. Greyhound data are presented in the appendices.

Welcome Center Registration Data

Travel party registrants provide the Welcome Centers with trip-related information. Welcome Center registrants comprised about four-fifths of the persons serviced in FY 2004, with 2,373,513 registrants out of 2,937,560 persons serviced. The majority of Welcome Center registrants are U.S. residents. International travelers account for a small portion; e.g., 2 percent of the total. In FY 2004, they comprised 52,716, or 2.2 percent of the 2,373,513 registrants. This proportion was 1.9 percent in FY 2003 based on 43,931 International respondents out of 2,287,659 total Welcome Center registrants.

U.S. registrants increased by 3.4 percent between FY 2003 and FY 2004 while the International component increased by 20.0 percent. Total registrants increased by 3.8 percent between FY 2003 and FY 2004, per Table 1. Louisiana, Alabama, Texas, Florida, Georgia and Tennessee held the top six spots in FY 2004, excluding Mississippi, as evidenced by Table 3. Table 5 shows Canada with the most International registrants—37.2 percent market share in FY 2004, followed by England (16.7 percent) and Germany (13.7 percent).

Welcome Center Reservation Service

The Welcome Center Reservation Service enables travel counselors to make reservations for tourists/visitors in any hotel/motel, bed and breakfast, or campground that accepts those reservations. This Reservation Service completed its 11th year of operation in June 2004 with \$473,019 in revenue, 6,397 reservations and 8,185 room nights booked.

Convention and Visitors Bureau Motorcoach Survey

FY 2004 motorcoach surveys revealed a \$187.4 million economic impact in terms of estimated direct expenditures based on data reported to MDA/Tourism Division, a 2.6 percent increase over FY 2003. These six-month motorcoach surveys have been conducted since FY 1994. Total FY 2004 tours were 45,623 with about 1.8 million passengers, or 39.7 passengers per overnight/day tour. About one out of every six tours (17.2 percent) overnights in Mississippi. The Mississippi Group Tour Incentive Program facilitated about \$5 million in Mississippi FY 2004 motorcoach business.

Regional Airport/Air Passenger Trends

Mississippi's seven Regional Airports reported 1,147,263 deplanements in FY 2004, a 3.9 percent increase versus FY 2003. Carriers serving Jackson are Southwest Airlines, American Eagle, ASA/Delta, Comair, Continental Express, Northwest and USAirways Express. Scheduled air transportation to-and-from Gulfport-Biloxi included flights on Air Tran Airways, Southeast, Continental, Northwest and ASA. Mesaba Airlines d/b/a Northwest AirlinK serves the Mid-Delta, Hattiesburg-Laurel and Tupelo Regional Airports. Atlantic Southeast serves Meridian's Airport Authority and the Golden Triangle Regional Airport. Gulfport-Biloxi reported 90 charter flights in FY 2004 with 8,143 deplanements and 7,663 enplanements.

Ad Effectiveness Studies, FY 2003/FY 2004 (Source: TNS, July 2004)

These studies survey households outside of, but within a 500-mile radius of, Mississippi. Some goals are to identify the proportion of households that are aware of the state's advertising, measure the incremental travel that could be attributed to the MDA/Tourism Division's advertising campaign via Return on Investment (ROI) and evaluate trip satisfaction. The estimated FY 2004 ROI was roughly \$13, based on the Tourism General Fund revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's Domestic Consumer and Ad Placement costs. For FY 2003, the corresponding ROI was \$13.

Visitor Profile Trends, FY 2004 (Source: D.K. Shifflet & Associates, December 2004)

Nearly 31 million visitors (30.7 million person-trips) overnighed in, or passed through, Mississippi in FY 2004, the first time these estimates have reflected FY totals, as opposed to CY data. About 78 percent of all person-trips were Leisure and 22 percent Business-related. Total Day Leisure person-trips were about 12.5 million; Overnight Leisure person-trips totaled 11.4 million. About 84 percent of the Overnight Leisure visitors were from out-of-state. Ninety-one percent of all Overnight Leisure visitors came from 10 states—Louisiana, Mississippi, Georgia, Alabama, Florida, Tennessee, Texas, Missouri, Arkansas and Illinois. The top origin Designated Market Areas (DMAs) were New Orleans, Memphis, Atlanta and Birmingham. Overnight Leisure visitors to Mississippi spent \$111 per person/day versus the U.S. average of \$92. A key reason for this "spread" is that air travel expenditures are excluded in these indicators. Their Purpose of Stay in Mississippi was Getaway Weekend (34 percent), Visit Friend/Relative (24 percent), General Vacation (17 percent), Special Event (12 percent) and Other (12 percent).

Median household income for the overnight leisure visitors was \$58,000. Their average age was 46; retirees accounted for 18 percent of all overnight leisure visitors. About 2/5 travel parties have one or more children in the household. Only four percent of all Overnight Leisure visitors arrived by air. Two-thirds of these visitors stayed in hotels/motels; another 19 percent stayed with friends/relatives; and 14 percent stayed at campgrounds, second homes, B & B's. On average, they spent 2.5 nights (3.25 days) in Mississippi. The average travel party size was 2.47 persons. Most of the overnight leisure visitors are very familiar with the state; about 1/5 of them have taken 20+ overnight leisure trips to/in Mississippi during the past three years. Casino Gaming is the top leisure activity since 48 percent of all overnight leisure visitors indicated this.

Balance of Trade (Source: D.K. Shifflet & Associates, December 2004)

One way of presenting travel stats from an economic development perspective is through an inbound versus outbound travel analysis. This reflects a “balance of trade” measure where spending by inbound out-of-state travelers is the “export” and spending by Mississippi residents in other states is the “import.” Mississippi’s net balance of trade for CY 2003 was a + \$1.158 billion, the 7th highest surplus among the 48 continental states and D.C. This “net” difference is produced by three variables—traveler spending in the state by *nonresidents* and *residents* and *outside the state* by residents. It excludes airfare and spending by Visit Friend/Relative (VFR).

**TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY 2003 AND FY 2004**

Origin	FY 2003	FY 2004	Percentage Change
States	2,243,728	2,320,797	3.4
Countries	43,931	52,716	20.0
Total	2,287,659	2,373,513	3.8

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

SOURCE: MDA/Tourism Division, 2004.

TABLE 2
TOP TEN STATES, FY 2003

State	Visitors	Percentage of States	Percentage of Top Ten
Louisiana	523,963	23.3	33.7
Alabama	239,581	10.7	15.4
Florida	203,340	9.1	13.1
Texas	200,856	9.0	12.9
Georgia	114,979	5.1	7.4
Tennessee	92,917	4.1	6.0
Missouri	53,077	2.4	3.4
Illinois	50,719	2.3	3.3
Arkansas	45,848	2.0	2.9
Michigan	31,117	1.4	2.0
Other (Non-MS)	355,284	15.8	NA
Mississippi	332,047	14.8	NA
Total	2,243,728	100.0	NA

SOURCE: MDA/Tourism Division, 2003.

TABLE 3
TOP TEN STATES, FY 2004

State	Visitors	Percentage of States	Percentage of Top Ten
Louisiana	491,747	21.2	30.8
Alabama	252,302	10.9	15.8
Texas	209,967	9.0	13.2
Florida	208,984	9.0	13.1
Georgia	120,651	5.2	7.6
Tennessee	104,903	4.5	6.6
Missouri	61,081	2.6	3.8
Illinois	59,076	2.5	3.7
Arkansas	52,691	2.3	3.3
Michigan	34,073	1.5	2.1
Other (Non-MS)	376,844	16.2	NA
Mississippi	348,478	15.0	NA
Total	2,320,797	100.0	NA

SOURCE: MDA/Tourism Division, 2004.

TABLE 4
TOP TEN COUNTRIES, FY 2003

State	Visitors	Percentage of States	Percentage of Top Ten
Canada	14,844	33.8	41.4
Germany	6,529	14.9	18.2
England	5,992	13.6	16.7
France	2,072	4.7	5.8
Holland	1,690	3.8	4.7
Mexico	1,672	3.8	4.7
Australia	1,207	2.7	3.4
Japan	645	1.5	1.8
Switzerland	639	1.5	1.8
Belgium	598	1.4	1.7
Other	8,043	18.3	NA
Total	43,931	100.0	NA

SOURCE: MDA/Tourism Division, 2003.

TABLE 5
TOP TEN COUNTRIES, FY 2004

State	Visitors	Percentage of States	Percentage of Top Ten
Canada	19,605	37.2	44.8
England	8,788	16.7	20.1
Germany	5,992	11.4	13.7
Mexico	2,451	4.6	5.6
France	1,879	3.6	4.3
Holland	1,627	3.0	3.7
Australia	1,609	3.0	3.7
Japan	681	1.3	1.6
Switzerland	608	1.2	1.4
Belgium	520	1.0	1.2
Other	8,956	17.0	NA
Total	52,716	100.0	NA

SOURCE: MDA/Tourism Division, 2004.

GAMING

Mississippi had 29 state-licensed casinos as of June 30, 2004. The average number of state-licensed casinos in operation throughout FY 2004 was 29.

Gaming Revenues

Total state-licensed casino Gross Gaming revenues were about \$2.78 billion in FY 2004. Nearly \$2.2 billion of this total, or 78 percent, were estimated “Net” Tourist/Visitor revenues. Mississippi’s total gaming-related tax revenues were \$332.2 million in FY 2004, with \$221.5 million in state receipts and \$110.7 million earmarked for cities/counties. Approximately 78 percent of the \$221.5 million in Gross Gaming state tax receipts, or \$172.8 million, comprised Net Tourist/Visitor state tax receipts. About \$130.5 million, or $\frac{3}{4}$ of the estimated \$172.8 million, went into the FY 2004 General Fund, while one-fourth were diverted, e.g., to MDOT.

FY 2003 and FY 2004 state-licensed casino Gross Gaming revenue Market Share by Gaming Region—North and South River and Gulf Coast—comprises Table 6. Table 7 includes the percentage change in Gross Gaming revenue by Regions between FY 2003 and FY 2004.

Mississippi Gaming Commission Quarterly Survey Trends

About 77 percent of all FY 2004 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Louisiana, Oklahoma, Illinois, Tennessee and Texas, per Mississippi Gaming Commission data. Coahoma and Tunica County casinos in the North River Region had 87 percent of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Oklahoma and Alabama patrons. About 42 percent of the South River Region—Greenville, Natchez and Vicksburg—casino patrons were from out-of-state; e.g., Arkansas and Louisiana, while 77

percent of Coast casino patrons were from out-of-state. Florida, Louisiana, Alabama and Georgia were the top four states for out-of-state Gulf Coast casino patrons.

Twenty-nine state-licensed casinos contributed to the local and state economy through an FY 2004 payroll of \$900 million. The FY 2004 advertising/promotional expenditures attributed to the state-licensed casinos were \$104.4 million. Casino patrons stayed in casino hotels throughout the three Gaming regions, as evidenced by Tables 8 and 9. The number of hotel rooms presented in Tables 8 and 9 are based on FY 2003 and FY 2004 quarterly averages.

The Mississippi Gaming Commission estimated that \$213 million dollars in direct capital investments for land, facilities and gaming equipment were attributed to the 29 state-licensed casinos and/or new development in FY 2004. These are significant investment dollars over and above state-licensed casino employment, tax revenues, etc.

Gaming Employment

FY 2004 quarterly casino employment figures were obtained from the Mississippi Gaming Commission via their quarterly surveys. FY 2004 figures reflect 29,500 state-licensed casino employees. Another 4,800 persons were employed at state-licensed casino hotels.

NonGaming (Room/Food and Beverage) Summary of Revenue for Mississippi Casinos

Room revenue at state-licensed casino hotels was \$264.6 million in FY 2004, while food and beverage revenue accounted for \$435.1 million, based on Mississippi Gaming Commission data. The combined room plus food and beverage revenue at state-licensed casinos is significant. The \$264.6 million in room revenue plus $\frac{3}{4}$ of the food and beverage revenue—\$326.3 million—plus an estimated \$82.7 million in other revenue (gifts/souvenirs) and the FY 2004 Net Tourist/Visitor Gaming revenues of \$2.17 billion, equal \$2.84 billion, or 46.5 percent of the \$6.1 billion in total estimated FY 2004 statewide Tourism sales.

TABLE 6

**GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2003 AND FY 2004**

Region	FY 2003 Gross Gaming Revenue	Percentage of FY 2003 Total	FY 2004 Gross Gaming Revenue	Percentage of FY 2004 Total
North River	\$1,184,933,537	43.9	\$1,208,919,000	43.5
Gulf Coast	1,170,535,939	43.3	1,221,100,661	43.9
South River	346,371,900	12.8	348,675,843	12.5
Total	\$2,701,841,376	100.0	\$2,778,695,504	100.0

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2004

TABLE 7

**GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY 2003 AND FY 2004**

Region	FY 2003 Gross Gaming Revenue	FY 2004 Gross Gaming Revenue	Percentage Change
North River	\$1,184,933,537	\$1,208,919,000	2.0
Gulf Coast	1,170,535,939	1,221,100,661	4.3
South River	346,371,900	348,675,843	0.7
Total	\$2,701,841,376	\$2,778,695,504	2.8

Note: Table 6 and Table 7 reflect Gaming Revenue Region shares. Gulf Coast revenues are for Hancock and Harrison counties. North River revenues pertain to Coahoma and Tunica counties. South River revenues comprise Adams, Warren and Washington counties. This is the case for Tables 6 - 9.

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2004.

TABLE 8

SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2003

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percent	Average Daily Rate	REV PAR*
North River	12	6,023	88.2	\$52.13	\$45.98
Gulf Coast	13	6,964	77.0	57.40	44.20
South River	8	839	76.5	55.30	42.30
Total/Average	33	13,826	81.9	\$54.81	\$44.89

TABLE 9

SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2004

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percent	Average Daily Rate	REV PAR*
North River	13	6,400	87.9	\$52.39	\$46.05
Gulf Coast	13	7,004	73.5	56.23	41.33
South River	8	865	77.1	56.04	43.21
Total/Average	34	14,269	79.2	\$53.78	\$42.59

Note: Table 8 and Table 9 figures reflect fiscal year **quarterly averages**. The REV PAR indicator is the Occupancy Percent times the Average Daily Rate.

SOURCES: Mississippi Gaming Commission Quarterly Surveys, 2003-2004.

INTERNATIONAL TRAVEL

This section highlights some International Travel items for FY 2003 and FY 2004.

MDA/Tourism Division began tracking International Travel to Mississippi in CY 2001. The following information is separate from the number of International Welcome Center Registrants depicted in Tables 4 and 5.

FY 2003 and FY 2004 Visitor Sample

Target markets were determined for countries that the MDA/Tourism Division has representation, e.g., England, Scotland, Wales, Ireland, Holland, France, Denmark, Belgium, Switzerland, Sweden, Norway, Austria, Germany, Japan, Canada, and Mexico. Representation is from Global Contact, Lofthouse Enterprises (Europe) and Lakeview Productions (Canada). Japan and Mexico are represented through Travel South and Mississippi River Country.

Survey forms are sent to participating attractions on a quarterly basis to secure International Visitor data. This includes the number of visitors by country of origin for selected attractions. The sample of attractions are located throughout the state's five Tourism Regions with cities/areas including Biloxi-Gulfport, Clarksdale, Jackson, Kosciusko and Tupelo. Data reflected in Table 10 comprises complete information for FY 2003 and FY 2004 in terms of countries within the target markets.

TABLE 10
**TOP TARGET MARKETS FOR INTERNATIONAL
VISITOR ATTRACTIONS, FY 2003 AND FY 2004**

Country	FY 2003 Market Total	Target Percent FY 2003 Total	Country	FY 2004 Market Total	Target Percent FY 2004 Total
England	3,731	30.4	England	4,774	45.1
Canada	2,318	18.9	Canada	1,926	18.2
Germany	1,590	12.9	Germany	1,075	10.2
Holland	1,150	9.4	Holland	599	5.7
Scotland	592	4.8	Scotland	389	3.7
Sweden	485	3.9	Ireland	313	3.0
France	358	2.9	Sweden	224	2.1
Ireland	341	2.8	France	222	2.1
Japan	336	2.7	Belgium	215	2.0
Switzerland	306	2.5	Japan	187	1.7
Belgium	268	2.2	Norway	178	1.6
Norway	235	1.9	Switzerland	161	1.5
Denmark	187	1.5	Denmark	93	0.9
Wales	156	1.3	Mexico	84	0.8
Mexico	121	1.0	Wales	81	0.8
Austria	113	0.9	Austria	62	0.6
Sub-Total	12,287	100.0	Sub-Total	10,583	100.0
Other	1,931		Other	1,850	
Total	14,218	100.0	Total	12,433	100.0

SOURCE: MDA/Tourism Division, 2004.

OUTDOOR RECREATION

This section focuses on the Mississippi Department of Wildlife, Fisheries and Parks due to their status as a state agency and various Federal entities. Employment and revenue figures for the U.S. Army Corps of Engineers, Vicksburg's National Military Park and Natchez's National Historical Park are in Appendices A and B.

Mississippi Department of Wildlife, Fisheries and Parks

Fishing and hunting licenses issued to nonresidents are tourist/visitor indicators. Nonresident (tourists/visitors) revenues portion, based on licenses issued and sales for all game hunting, 7-day all game hunting, archery-primitive weapon, small game hunting, freshwater fishing, among other nonresident fishing and hunting activities, were \$7,372,405 in FY 2004. The number of FY 2004 nonresident fishing and hunting licenses totaled 100,063.

Mississippi's 28 State Parks provide viable Tourism options for diverse leisure pursuits. Table 11 contrasts FY 2003 and FY 2004 information for park visitation. These State Parks had 234 cabins, 48 motel rooms and 1,618 campsites on 23,467 acres in FY 2004. State Park FY 2003 and FY 2004 employment figures are in Appendix A. Payroll data are in Appendix B. Appendix C has their estimated FY 2003 and FY 2004 tourism revenues. FY 2003 and FY 2004 data reflect nonresident licensing revenues and State Parks' estimated tourism-related revenues.

Selected Federal Park and Recreation Areas

Vicksburg's National Military Park reported 746,810 FY 2004 visitors, a 1.6 percent increase over FY 2003. The number of visitors to the Military Park has varied in the past few years and a significant proportion of those visitors are from out-of-state and various countries.

Vicksburg's District Office of the U.S. Army Corps of Engineers reported 4,685,054 FY 2004 combined visits at Arkabutla, Enid, Grenada and Sardis Lakes. On average, each visit was

of five hours and 21 minutes duration, based on the 25.1 million visitor hours tabulated. The Columbus Office of the U.S. Army Corps of Engineers cited nearly 2.7 million FY 2004 total visits along the Tennessee-Tombigbee Waterway; an estimated 80 percent of the overall visitation (2.15 million visits) pertained to the Mississippi portion.

The Natchez National Historical Park accounted for 206,424 visitors in FY 2004. Their FY 2004 Eastern National Park & Monument Association sales and fee collections are reflected in Appendix C, as is the case with the same information for Vicksburg's National Military Park.

TABLE 11
STATE PARK VISITATION, FY 2003 AND FY 2004

Park	FY 2003 Visits	FY 2004 Visits	Percentage Change
Buccaneer	476,976	558,248	17.0
Casey Jones	3,026	1,636	-45.9
Clark Creek	1,060	14,655	1,282.5
Clarkco	96,988	103,036	6.2
Floewood	15,280	15,720	2.9
George P. Cossar	159,536	153,284	-3.9
Golden Memorial	4,948	4,344	-12.2
Great River Road	83,164	67,628	-18.7
Holmes County	79,080	77,260	-2.3
Hugh White	163,428	168,928	3.4
J.P. Coleman	38,804	32,504	-16.2
John W. Kyle	95,052	129,784	36.5
Lake Lincoln	88,464	97,980	10.8
Lake Lowndes	173,376	147,232	-15.1
LeFleur's Bluff	316,121	319,996	1.2
Legion	63,864	84,333	32.1
Leroy Percy	36,496	30,312	-16.9
Nanah Waiya	12,612	10,676	-15.4
Natchez	39,376	41,808	6.2
Paul B. Johnson	379,316	405,120	6.8
Percy Quin	138,248	88,408	-36.1
Roosevelt	194,220	187,620	-3.4
Shepard	30,124	26,648	-11.5
Tishomingo	100,764	95,168	-5.6
Tombigbee	47,876	44,568	-6.9
Trace	116,552	115,360	-1.0
Wall Doxey	95,220	105,816	11.1
Total	3,049,971	3,128,072	2.6

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2004.

LOCAL LEVEL INDICATORS

Local Tourism indicators include economic impact based on hotel/motel tax levies and restaurant taxes collected, meetings and conventions, special projects, among other projects.

Room/Restaurant Tax Revenue

Room/Restaurant tax percentages range from 1 to 3 percent. Table 12 presents these tax percentages by jurisdiction, plus the FY 2004 gross Tourism special tax revenue. About 69.3% of the gross special tax revenues are from restaurant sales with 30.7% from lodging sales.

Meetings and Conventions

Meetings and conventions are a multi-million dollar market in Mississippi. Precise data are hard to compile due to the diverse nature of trade shows, conferences, seminars and conventions. MDA/Tourism Division, Research Unit, has conducted surveys at six-month intervals from FY 1994 - FY 2004 on conventions, trade shows and conferences/seminars.

Complete FY 2004 data were reported by Tupelo—280 conventions, conferences and seminars with 30,455 delegates and 14 trade shows with 115,575 attendees; DeSoto County—75 conventions with 9,150 attendees, 13 trade shows/23,000 attendees and 335 conferences and seminars with 21,900 participants; Hattiesburg—333 conventions/47,661 attendees plus trade shows with 57,300 attendees and conferences/seminars with 114,699 participants. Partial data were reported by Canton, Hancock County, Jackson, the Mississippi Gulf Coast CVB, Louisville/Winston County, Oxford, Pike County, Ridgeland and Vicksburg.

MDA/Tourism Division's Meeting and Convention Incentive Program awarded some \$75,000 to various associations through December 2004. These associations, in turn, have or will spend about a combined \$13.6 million in Mississippi, including future events such as the National Governors' Association and the Southeastern Shrine Association.

Film Productions, Documentaries and Commercials

FY 2004 may be seen as the most important in the 30+ year history of the Mississippi Film Office. On May 12, 2004, Governor Haley Barbour signed into law a broad incentives bill for the film industry. This legislation, introduced by Representative Diane C. Peranich and the House Committee on Tourism, will both attract production from out-of-state and support Mississippi filmmakers. The four point plan includes a 10% tax credit for local payroll, a 10% tax rebate for all in-state production expenditures, an expansion of tax exempt production items, and a reduction of the tax on all equipment used in film production. The incentives apply to all forms of filmed entertainment: feature film, television, documentaries and commercials.

The incentives are the first step in realizing the vision outlined in the groundbreaking 2003 Mississippi Film Office Agenda for the future of the film industry in Mississippi. The Agenda focuses the attention on incentives for both Hollywood and local production, seeks the creation of film industry training programs and outlines the development of film funding for Mississippi production.

In FY 2004, the Mississippi Film Office coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films and commercials. While each project created direct economic impact and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up and location fees all add to the total impact of filming on location. Every corner of the state saw production activity.

The Mississippi Film Office again sponsored the Magnolia Independent Film Festival (Starkville), the Crossroads Film Festival (Jackson), the Natchez Literary and Cinema

Celebration and the Oxford Film Festival. Additionally, the Film Office supported the inaugural Tupelo Film Festival. Incentive grants were given to Mississippians for the development of film projects, to communities for the support of film festivals (Oxford, Natchez, Columbus, Jackson, Tupelo) and to film programs (Crossroads Film Society, Mississippi Film and Video Alliance) in support of Mississippi filmmakers and audiences.

County Revenues and Hotel/Motel Room Data

Estimated FY 2004 Tourism Revenues and Employment data for Mississippi's 82 counties plus estimated countywide Tourism Employment and other indicators such as Tourism Capital Investment comprise Appendix G. The sum of Appendix G revenue figures is less than the total estimated statewide Tourism revenues per the first set of footnotes under Appendix G. Table 12 reflects FY 2004 Room/Restaurant Tax Revenues at the local level.

Mississippi's 617 total hotel/motel properties as of June 30, 2004, were 0.2 percent fewer than the 618 total hotel/motel properties as of June 30, 2003, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms decreased from a 54,110 as of June 30, 2003, to 54,027 as of June 30, 2004, or -0.2 percent, per Appendix H. It's estimated that 1,100 new statewide hotel/motel rooms were/will be under construction between July 2004 and June 2005, or 2.0 percent above June 2004 levels.

Mississippi had an estimated 172 Bed & Breakfasts (B & B's) as of June 30, 2004, with 798 total B & B rooms, 514 cabin rooms, 1,513 condo/timeshare rooms and 10,962 recreational vehicle (RV) spaces with electricity and water, per the FY 2004 MDA/Tourism Division survey.

The 12-month statewide average daily rate (ADR), based on Smith Travel Research (STR) and Mississippi State Tax Commission data through June 2004, was nearly \$60 (\$59.21). Mississippi's estimated 12-month statewide occupancy percent was about 59 percent, using STR.

TABLE 12
**ROOM AND RESTAURANT GROSS SPECIAL
TAX REVENUES BY TOURISM OFFICE, FY 2004**

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2004 Room Tax Revenue	Gross FY 2004 Restaurant Tax Revenue	Gross Total Special Tax Revenue
Aberdeen	1.0	1.0	\$11,713	\$50,313	\$62,026
Batesville	3.0	3.0	119,522	610,146	729,668
Bay Springs	3.0	None	5,093	None	5,093
Canton	2.0	2.0	71,517	347,707	419,224
Cleveland	2.0	2.0	69,975	420,721	490,696
Clinton	2.0	None	69,017	None	69,017
Coahoma County	2.0	1.0	76,055	224,419	300,474
Columbus-Lowndes	2.0	2.0	180,068	1,013,725	1,193,793
Corinth	2.0	2.0	48,267	681,882	730,149
DeSoto County	2.0	2.0	509,130	3,180,139	3,689,269
Florence	None	2.0	None	116,029	116,029
Flowood	None	2.0	None	940,720	940,720
Greenwood	1.0	1.0	43,504	258,567	302,071
Grenada	2.0	1.0	101,841	252,952	354,793
Hancock County	2.0	None	154,090	None	154,090
Harrison County	3.0	None	4,517,352	None	4,517,352
Hattiesburg	2.0	2.0	349,529	2,852,442	3,201,971
Hernando	1.0	None	7,327	None	7,327
Holly Springs	2.0	2.0	32,055	165,067	197,122
Indianola	2.0	2.0	29,976	152,576	182,552
Jackson (city)	1.0	1.0	588,966	2,544,143	3,133,109
Kosciusko	2.0	None	23,037	None	23,037
Lauderdale County	2.5	None	415,787	None	415,787
Laurel	2.0	2.0	35,289	890,796	926,085

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2004 Room Tax Revenue	Gross FY 2004 Restaurant Tax Revenue	Gross Total Special Tax Revenue
Magee	1.0	1.0	12,421	132,360	144,781
Montgomery County	2.0	None	19,576	None	19,576
Moss Point	3.0	None	182,178	None	182,178
Natchez	3.0	1.5	288,743	511,956	800,699
New Albany	2.0	2.0	31,330	373,505	404,835
Newton	\$1/room	None	15,434	None	15,434
Ocean Springs	2.0	None	29,930	None	29,930
Oxford	2.0	2.0	127,564	1,159,829	1,287,393
Philadelphia	3.0	None	83,846	None	83,846
Picayune	2.0	1.0	29,170	241,611	270,781
Rankin County	2.0	None	319,744	None	319,744
Richland	None	2.0	None	246,264	246,264
Ridgeland	1.0	1.0	163,163	725,464	888,627
Southaven	1.0	None	94,162	None	94,162
Starkville	2.0	2.0	79,313	966,475	1,045,788
Stone County	2.0	2.0	16,625	199,766	216,391
Tishomingo County	2.0	None	13,717	None	13,717
Tunica County	3.0	3.0	788,995	1,823,811	2,612,806
Tupelo	2.0	2.0	302,318	2,172,104	2,474,422
Vicksburg	3.0	1.0	529,821	590,088	1,119,909
Washington County	1.0	1.0	72,359	468,133	540,492
West Point	1.0	None	194,743	None	194,743
Yazoo County	2.0	2.0	30,920	236,829	267,749
Total			10,885,182	24,550,539	35,435,721

NOTE: Tourism Offices include Convention and Visitor Bureaus (CVBs), Convention and Visitor Councils, Tourism Councils, Cities/Counties, Tourism Commissions and Chambers of Commerce. A portion of Gross Room/Restaurant tax revenues is attributed to locals based on nationwide, statewide and countywide research. In one case, a portion of the Room tax revenue goes to the CVB while another part is for the operation of the local Convention Center. Indianola began collecting their local two percent Taxes in August 2003, the second month of the state's FY 2004.

SOURCE: Mississippi State Tax Commission, 2004.

Tourism Capital Investment (TCI)– Initial FY 2004 Survey

MDA/Tourism Division's Research Unit, with the assistance of Tourism Offices, Chambers of Commerce, state agencies, McGraw Hill Construction, among others, conducted its first-ever TCI survey. The purpose of documenting TCI is to position the Tourism Industry Group within the economic development sphere along with other sectors, sub-sectors and industry groups. Appendix G presents the estimated FY 2004 Tourism Capital Investment expenditures by county, reflecting new construction and expansion/renovation of Tourism-related businesses/projects from antique stores to zoos. These dollar amounts do not reflect announcements nor dollars spent over a multi-year period. They reflect estimated expenditures during the course of the 12-month period from July 1, 2003 through June 30, 2004.

Total estimated statewide TCI in FY 2004 was \$440.8 million, based on information secured. Nearly ½ of this amount (about 48 percent) pertained to new or expanded state-licensed casino development, from hotels, restaurants, equipment, etc. The other investments covered the gamut from aquariums to infrastructure to zoos. Tourism factors were assigned to the various businesses/projects along the lines of factors used for estimated sales, e.g., for museums, restaurants, retail establishments, among others.

The Mississippi Gulf Coast accounted for about \$202 million in FY 2004 TCI, or 46 percent of the state's total. Museums, casinos, retail establishments, infrastructure and many others comprised this TCI. This represents a portion of a much larger dollar amount that's expected to be spent over the next four years in various new and expansion-related projects.

Tunica County's estimated \$79.2 million in FY 2004 TCI comprised 18 percent of the statewide total. A portion of this county's TCI came via county funds for their Airport, Golf Courses/Tennis Complex and River Park Museum & Interpretive Center. The Metro Jackson Area's (Hinds-Madison-Rankin counties) TCI was roughly \$50 million, or about 11.3 percent (\$1 out of every \$9 invested) of the \$440.8 million figure. New hotel and expansion/renovation projects plus infrastructure projects were in the mix.

Vicksburg had \$19+ million in estimated FY 2004 TCI between historic homes/sites, landscaping/beautification, recreation initiatives, casino-related projects, Welcome Center renovation, among others. They have a number of pending projects, according to their CVB, City and Chamber of Commerce.

The Hattiesburg area (Forrest/Lamar counties) reflected \$12.6 million in FY 2004 TCI. Examples included a Rails-to-Trails project, golf course development, new retail establishments, hotel/motel expansions, along with depot and zoo expansions.

DeSoto County and Tupelo each had some interesting projects and should be positioned for continued TCI. Tupelo's downtown area, in particular, has several major FY 2005 projects. Tishomingo County reflected second home construction with TCI implications. They were extremely cooperative in furnishing this plus additional information, as were the other CVB's, Cities, Counties, Chambers and Tourism Offices mentioned above and below.

Coahoma County's new Welcome Center was among the Delta Region's TCI. Cleveland had various projects such as a hotel-related one. Indianola's projects included the renovation of a ginnery and a club/café. The B.B. King Museum project has TCI implications.

Contacts in Ocean Springs and Pascagoula provided pertinent TCI details as did contacts in Laurel, Port Gibson/Claiborne County, Covington County, Neshoba County, Woodville/Wilkinson County. They included B & B's, museums, train depots, among other projects.

Tippah County's Development Foundation and the Louisville/Winston County Chamber of Commerce were among other entities furnishing detailed and informative TCI data. The Bed & Breakfast Association of Mississippi coordinated/helped facilitate timely data. And a variety of state agencies—the Arts Commission; the Department of Archives and History; MDOT; the Department of Wildlife, Fisheries & Parks; the Gaming Commission; DFA—were most helpful.

McGraw Hill Construction identified new FY 2004 TCI construction and renovations at the county level. It is anticipated that they will continue to do so for the FY 2005 TCI project.

The FY 2005 TCI survey will be done in two (2) six-month intervals with the hope that more complete information will be secured. The \$440.8 million estimate for FY 2004 helped present a broader overview beyond tourist/visitor expenditures, tax revenues and other indicators. This figure will vary in subsequent years, depending on the nature of TCI projects, the thorough nature of the data provided and the completed surveys returned to our office.

APPENDICES

APPENDIX A
ESTIMATED TOURISM
EMPLOYMENT, FY 2003 AND FY 2004

CATEGORY	FY 2003	FY 2004	PERCENTAGE CHANGE
FOOD SERVICES & DRINKING PLACES (1)	28,375	29,482	3.9
LODGING (2)	14,877	16,640	11.9
GAMING (3)	34,200	29,500	-13.7
RETAIL TRADE (4)	8,738	8,700	-0.4
SUPPORT ACTIVITIES, AIR TRANSPORTATION	1,660	1,697	2.2
TRAVEL ARRANGEMENT/RESERVATIONS	505	498	-1.4
PASSENGER CAR RENTAL	168	167	-0.6
AIR PASSENGER, SCHEDULED & CHARTERED (5)	315	283	-10.2
SCENIC & SIGHTSEEING TRANSPORTATION	40	65	62.5
CHARTER BUS INDUSTRY	111	104	-6.3
TAXI SERVICE	34	36	5.9
SUBTOTAL, TRANSPORTATION	2,833	2,850	0.6
MOTION PICTURE THEATERS	163	154	-5.5
MOTION PICTURE & VIDEO PRODUCTION	63	83	31.7
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	226	216	-4.4
BOWLING CENTERS	79	73	-7.6
PERFORMING ARTS, SPECTATOR SPORTS, AND RELATED INDUSTRIES	216	214	-0.9
GOLF COURSES & COUNTRY CLUBS	764	842	10.2
MARINAS	75	92	22.7
AMUSEMENT PARKS & ARCADES	NA	52	NA
STATE PARKS & FEDERAL RECREATION	654	660	0.9
STATE, CITY, COUNTY TOURISM OFFICES (6)	237	240	1.3
SUBTOTAL, (ATTRACTIONS/RECREATION/ ENTERTAINMENT/STATE/LOCAL/FEDERAL GOV'T)	2,477	2,626	6.0
NONRESIDENTIAL BUILDING CONSTRUCTION (7)	NA	1,364	NA
HIGHWAY, STREET AND BRIDGE CONSTRUCTION (7)	NA	1,238	NA
SUBTOTAL, CONSTRUCTION	NA	2,602	NA
TOTAL	91,500	92,400	1.0

Appendix A (continued)

This Appendix Includes:

1. Alcohol/Nonalcohol Restaurants, Drinking Places, among other establishments.
2. Estimates based on Mississippi Department of Employment Security data for Hotels & Motels (NAICS 72111), Other Traveler Accommodations (NAICS 72119) and RV Parks & Recreational Camps (NAICS 7212) plus the state-licensed casino hotel employees.
3. Based on Mississippi Gaming Commission quarterly survey and the data include state-licensed casino hotel employees. Pearl River Resort data were not available in FY 2004.
4. Include Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Tobacco Stores.
5. Reflects non-cargo jobs only.
6. Includes the number of Full-Time Equivalent (FTE) staff at Mississippi's 11 Welcome Centers. Mississippi's 12th Welcome Center opened in FY 2005.
7. Estimated for the first time in FY 2004, based on the FY 2004 Tourism Capital Investment Survey.

SOURCES: Mississippi Department of Wildlife, Fisheries Parks, 2004.
Mississippi Department of Employment Security, Labor Market Information (LMI) Department, 2004.
MDA/Tourism Division, 2004.
Mississippi Gaming Commission, 2004.
Mississippi State Tax Commission, 2004.
Mississippi Tourism Association, 2004.

APPENDIX B
ESTIMATED TOURISM PAYROLL, FY 2003 AND FY 2004

CATEGORY	FY 2003 PAYROLL	FY 2004 PAYROLL
FOOD SERVICES & DRINKING PLACES	\$277,923,661	\$294,037,420
LODGING (1)	106,697,565	119,501,224
GAMING (2)	936,187,429	899,159,804
RETAIL TRADE (3)	125,610,396	126,116,849
SUPPORT ACTIVITIES, AIR TRANSPORTATION	62,209,335	62,556,178
TRAVEL ARRANGEMENT/RESERVATIONS	9,421,416	9,406,571
PASSENGER CAR RENTAL	3,251,429	3,466,071
AIR PASSENGER, SCHEDULED & CHARTERED	9,082,801	8,136,446
SCENIC & SIGHTSEEING TRANSPORTATION	706,395	1,248,979
CHARTER BUS INDUSTRY	1,568,410	1,669,517
TAXI SERVICE	749,405	884,161
SUBTOTAL, TRANSPORTATION	86,989,191	87,367,923
MOTION PICTURE THEATERS	1,253,325	1,244,784
MOTION PICTURE & VIDEO PRODUCTION	1,469,112	2,022,481
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	4,723,290	4,921,308
BOWLING CENTERS	801,822	788,026
PERFORMING ARTS, SPECTATOR SPORTS AND RELATED INDUSTRIES	4,100,863	4,238,681
GOLF COURSES	11,166,692	12,889,714
STATE PARKS & FEDERAL RECREATION	23,818,408	23,977,959
STATE, CITY, COUNTY TOURISM OFFICES (4)	7,702,460	8,038,869
MARINAS	1,600,181	1,714,592
AMUSEMENT PARKS & ARCADES	NA	455,284
SUBTOTAL, (ATTRACTIONS/RECREATION/ ENTERTAINMENT/STATE/LOCAL/FEDERAL GOVT)	56,636,153	60,291,698
NONRESIDENTIAL BUILDING CONSTRUCTION (5)	NA	46,038,636
HIGHWAY, STREET AND BRIDGE CONSTRUCTION (5)	NA	38,554,500
SUBTOTAL, CONSTRUCTION		\$84,593,136
TOTAL	\$1,590,044,395	\$1,671,068,054

Appendix B (continued)

1. Does not include the payroll of employees at state-licensed casino hotels or the Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state – licensed casinos plus the employees at state-licensed casino hotels. FY 2004 data do not reflect the estimated payroll of casino and hotel employees at the Pearl River Resort.
3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Tobacco Stores.
4. Includes the payroll of staff at Mississippi's 11 Highway Welcome Centers.
5. Estimated for the first time in FY 2004, based on the FY 2004 Tourism Capital Investment Survey.

SOURCES: Mississippi Department of Wildlife, Fisheries & Parks, 2004.
Mississippi Department of Employment Security, LMI Department, 2004.
MDA/Tourism Division, 2004.
Mississippi Gaming Commission, 2004.
Mississippi Tourism Association, 2004.

APPENDIX C
ESTIMATED TOURISM
EXPENDITURES, FY 2003 AND FY 2004

CATEGORY	FY 2003	FY 2004	Percentage Change
RESTAURANTS	\$845,311,819	\$939,013,335	11.1
QUICK-STOP GROCERIES	320,513,438	349,951,862	9.2
CONCESSIONS QUICK FOOD	116,180,670	131,531,714	13.2
BAR & BEER PARLORS	58,612,275	62,693,665	7.0
LODGING	442,119,152	500,536,945	13.2
GAMING (1)	2,107,436,273	2,167,382,493	2.8
DEPARTMENT STORES	723,048,173	716,777,707	-0.9
APPAREL & ACCESSORIES	120,276,611	123,445,498	2.6
GENERAL MERCHANDISE (NEC)	40,725,857	35,745,132	-12.2
MISCELLANEOUS RETAIL (NEC)	81,115,004	88,146,205	8.7
GIFT, NOVELTY & SOUVENIR	71,578,007	75,269,271	5.2
SPORTING GOODS & BICYCLE	42,491,862	28,371,028	-33.2
CAMERA & PHOTOGRAPHIC STORES	12,294,887	12,342,844	0.4
ANTIQUA & SECONDHAND STORES	20,804,098	21,057,545	1.2
CIGAR STORES & STANDS	21,799,421	13,255,854	-39.2
GAMING RELATED GIFT/NOVELTY (2)	NA	87,629,264	NA
GASOLINE AT 18 CENTS (3)	469,976,102	534,838,535	13.8
GASOLINE SERVICE STATIONS	41,771,130	42,824,789	2.5
DIESEL FUEL AT 18 CENTS (3)	48,459,084	52,223,888	7.8
FIXED FACILITIES, AIR TRANSPORTATION (4)	1,842,492	1,687,881	-8.4
REGIONAL AIRPORTS (5)	20,192,861	NA	NA
RENTAL & LEASING, TRANSPORTATION	34,005,395	30,829,141	-9.3

Appendix C (continued)

CATEGORY	FY 2003	FY 2004	Percentage Change
AUTO REPAIR SHOPS	\$13,529,111	\$14,485,816	7.1
GREYHOUND (6)	2,146,030	NA	NA
MARINA SERVICES	5,041,845	5,535,199	9.8
PUBLIC GOLF COURSES	10,041,025	10,066,176	0.3
MOTION PICTURE SHOWS	8,877,030	9,501,797	7.0
DANCE HALLS, NIGHT CLUBS	252,152	254,702	1.0
PARKS	12,889,870	12,574,510	-2.4
BOWLING, BILLIARDS & POOL	2,639,477	2,718,779	3.0
COLLEGE ATHLETICS	7,634,614	9,866,251	29.2
SKATING RINKS	685,752	887,793	29.5
RACE TRACKS	244,047	333,037	36.5
AQUARIUMS, BOTANICAL GARDENS	836,149	818,297	-2.1
MUSEUMS	1,272,051	1,660,198	30.5
LICENSING FEES--NONRESIDENT HUNTING & FISHING (7)	7,438,363	7,372,405	-0.9
STATE PARKS	3,809,916	3,226,251	-15.3
FEDERAL PARKS & LAKES	730,030	595,939	-18.4
NATIONAL HISTORICAL AREAS	1,544,449	1,544,454	None
ADVERTISING SPECIALTIES	2,179,629	2,311,599	6.1
PRINTING & PUBLISHING	2,945,464	3,195,876	8.5
LAUNDRIES, DRY CLEANING	7,750,350	8,452,172	9.1
TOTAL	\$5,733,041,965	\$6,110,955,847	6.6

Appendix C (continued)

This Appendix Includes:

1. Net Tourist/Visitor Gross Gaming Revenues for 29 state-licensed casinos.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages.
4. Air Transportation, Air Terminal and Transportation Services.
5. Gross airport operating revenues in FY 2004 were excluded.
6. Estimated sales in FY 2004 were excluded since this involves ground transportation ticket sales.
7. Only the nonresident fishing and hunting licensing portion were computed.

SOURCES: American Automobile Association Web Site, 2004.
MDA/Energy Division, 2004.
MDA/Tourism Division, 2004.
Mississippi Department of Wildlife, Fisheries & Parks, 2004.
Mississippi Gaming Commission, 2004.
Mississippi State Tax Commission, 2004.
U.S. Army Corps of Engineers, Vicksburg Headquarters and
the Columbus, Mississippi Office, 2004.
U.S. Department of the Interior, National Park Service:
Natchez National Historical Park, Vicksburg National Military Park, 2004.

APPENDIX D
ESTIMATED TOURISM
TAX REVENUES, FY 2003 AND FY 2004

CATEGORY	FY 2003	FY 2004	Percentage Change
RESTAURANTS	\$59,130,668	\$65,684,144	11.1
QUICK-STOP GROCERIES	22,432,500	24,461,026	9.0
CONCESSIONS QUICK FOOD	8,126,017	9,206,134	13.3
BAR & BEER PARLORS	4,098,570	4,388,488	7.1
LODGING	30,946,466	35,037,328	13.2
GAMING (1)	171,541,927	172,787,882	0.7
DEPARTMENT STORES	50,566,839	50,174,330	-0.8
APPAREL & ACCESSORIES	8,402,521	8,639,046	2.8
GENERAL MERCHANDISE (NEC)	2,833,957	2,489,377	-12.2
MISCELLANEOUS RETAIL (NEC)	5,445,543	5,894,385	8.2
GIFT, NOVELTY & SOUVENIR	4,993,349	5,266,574	5.5
SPORTING GOODS & BICYCLE	2,973,254	1,985,266	-33.2
CAMERA & PHOTOGRAPHIC STORES	856,753	858,316	0.2
CIGAR STORES & STANDS	1,525,961	927,911	-39.2
ANTIQUE & SECONDHAND STORES	1,453,784	1,471,617	1.2
GAMING RELATED GIFT/NOVELTY (2)	NA	6,134,049	NA
GASOLINE AT 18 CENTS (3)	58,497,935	58,295,971	-0.3
GASOLINE SERVICE STATIONS	2,915,148	2,992,282	2.6
DIESEL FUEL AT 18 CENTS (3)	6,098,807	6,718,230	10.2
FIXED FACILITIES, AIR TRANSPORTATION (4)	104,617	92,229	-11.8
RENTAL & LEASING, TRANSPORTATION	1,691,710	1,510,374	-10.7
AUTO REPAIR SHOPS	933,608	997,002	6.8

Appendix D (continued)

CATEGORY	FY 2003	FY 2004	Percentage Change
MARINA SERVICES	\$337,571	\$387,464	14.8
PUBLIC GOLF COURSES	703,255	704,814	0.2
MOTION PICTURE SHOWS	621,393	665,126	7.0
DANCE HALLS, NIGHT CLUBS	15,175	12,747	-16.0
PARKS	898,919	876,728	-2.5
BOWLING, BILLIARDS & POOL	184,763	190,315	3.0
COLLEGE ATHLETICS	534,423	690,638	29.2
SKATING RINKS	48,003	62,145	29.5
RACE TRACKS	17,083	22,195	29.9
AQUARIUMS, BOTANICAL GARDENS	58,733	57,588	-2.0
MUSEUMS	55,385	65,282	17.9
ADVERTISING SPECIALTIES	143,100	150,616	5.3
PRINTING & PUBLISHING	205,967	222,624	8.1
LAUNDRIES, DRY CLEANING	539,941	590,631	9.4
TOTAL	\$449,933,645	\$470,710,874	4.6

This Appendix Includes:

1. Comprises the Net Tourist/Visitor State Gaming Tax Revenues.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages. The estimated tourism-related gasoline/diesel fuel State Tax Revenues were diverted to MDOT/other agencies.
4. Air Transportation and Air Terminal Service.

SOURCES: American Automobile Association Web Site, 2004.
 MDA/Energy Division, 2004.
 MDA/Tourism Division, 2004.
 Mississippi State Tax Commission, 2004.

APPENDIX E
ESTIMATED MISSISSIPPI GENERAL FUND
TOURISM REVENUES, FY 2003 AND FY 2004

CATEGORY	FY 2003	FY 2004	Percentage Change
RESTAURANTS	\$59,130,668	\$65,684,144	11.1
QUICK-STOP GROCERIES	22,432,500	24,461,026	9.0
CONCESSIONS QUICK FOOD	8,126,017	9,206,134	13.3
BAR & BEER PARLORS	4,098,570	4,388,488	7.1
LODGING	30,946,466	35,037,328	13.2
GAMING (1)	129,593,237	130,512,151	0.7
DEPARTMENT STORES	50,566,839	50,174,330	-0.8
APPAREL & ACCESSORIES	8,402,521	8,639,046	2.8
GENERAL MERCHANDISE (NEC)	2,833,957	2,489,377	-12.2
MISCELLANEOUS RETAIL (NEC)	5,445,543	5,894,385	8.2
GIFT, NOVELTY & SOUVENIR	4,993,349	5,266,574	5.5
SPORTING GOODS & BICYCLE	2,973,254	1,985,266	-33.2
CAMERA & PHOTOGRAPHIC STORES	856,753	858,316	0.2
CIGAR STORES & STANDS	1,525,961	927,911	-39.2
ANTIQUE & SECONDHAND STORES	1,453,784	1,471,617	1.2
GAMING RELATED GIFT/NOVELTY (2)	NA	6,134,049	NA
GASOLINE AT 18 CENTS (3)	NA	NA	NA
GASOLINE SERVICE STATIONS	2,915,148	2,992,282	2.6
DIESEL FUEL AT 18 CENTS (3)	NA	NA	NA
FIXED FACILITIES, AIR TRANSPORTATION (4)	NA	NA	NA
RENTAL & LEASING, TRANSPORTATION	1,691,710	1,510,374	-10.7
AUTO REPAIR SHOPS	933,608	997,002	6.8
MARINA SERVICES	337,571	387,464	14.8
PUBLIC GOLF COURSES	703,255	704,814	0.2

Appendix E (continued)

CATEGORY	FY 2003	FY 2004	Percentage Change
MOTION PICTURE SHOWS	\$621,393	\$665,126	7.0
DANCE HALLS, NIGHT CLUBS	15,175	12,747	-16.0
PARKS	898,919	876,728	-2.5
BOWLING, BILLIARDS & POOL	184,763	190,315	3.0
COLLEGE ATHLETICS	534,423	690,638	29.2
SKATING RINKS	48,003	62,145	29.5
RACE TRACKS	17,083	22,195	29.9
AQUARIUMS, BOTANICAL GARDENS	58,733	57,588	-2.0
MUSEUMS	55,385	65,282	17.9
ADVERTISING SPECIALTIES	143,100	150,616	5.3
PRINTING & PUBLISHING	205,967	222,624	8.1
LAUNDRIES, DRY CLEANING	539,941	590,631	9.4
TOTAL	\$343,283,596	\$363,328,713	5.8

This Appendix Includes:

1. Approximately \$130.5 million, or about $\frac{3}{4}$ of the Net Tourist/Visitor State Gaming Tax Revenues, went to the General Fund in FY 2004. The other $\frac{1}{4}$ of these State Gaming Tax Revenues were diverted.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages. The estimated tourism-related gasoline/diesel fuel State Tax Revenues were diverted to MDOT/other agencies.
4. Air Transportation and Air Terminal Service. These were diverted.

SOURCES: American Automobile Association Web Site, 2004.
 MDA/Energy Division, 2004.
 MDA/Tourism Division, 2004.
 Mississippi State Tax Commission, 2004.

APPENDIX F
ESTIMATED TOP 10 MISSISSIPPI NONAGRICULTURAL WAGE AND SALARY
EMPLOYMENT RANKINGS BY SECTOR AND INDUSTRY/SUB-SECTOR, FY 2004

Sector	Establishment Based Employment	Rank	Employment Percentage by Sector	Private Sub-Sector or Industry Group	Private Sector Jobs	Rank
Government (1)	245,250	1	21.9	Tourism Industry	90,975	1
Manufacturing	178,000	2	15.9	Administrative & Support Services	39,250	2
Retail Trade	139,000	3	12.5	General Mdse.	38,100	3
Health Care & Social Assistance	101,950	4	9.1	Private Hospitals	30,400	4
Tourism Industry Group (2)	90,975	5	8.1	Prof., Scientific, Technical Services	29,500	5
Construction	50,700	6	4.5	Food Products	28,000	6
Administrative Support/Waste Mgt.	41,325	7	3.7	Furniture and Fixtures	27,900	7
Other Private Services	36,700	8	3.3	Transportation Equipment Manf.	26,375	8
Transportation & Warehousing	36,400	9	3.2	Specialty Trade Contractors	26,000	9
Wholesale Trade	35,800	10	3.2	Credit Intermediation	21,175	10
All Other Sectors (3)	163,760	NA	14.6	Other Sub-Sectors	516,935	NA
Total Employment (4)	1,119,860	NA	100.0	Private Employment	874,610	NA

This Appendix Includes:

1. **All public sector** employment is included, e.g., Education, Health Care, Tourism, etc.
2. The Tourism Industry Group is not a two-digit Sector, per Definitions of Selected Terms on pages xi-xii. This Industry Group includes three-to-six digit **private** sector categories, e.g., Food Services & Drinking Places, Gasoline Stations, Hotels & Motels, among others. It also includes employment in two-digit Sectors such as Accommodation & Food Services and Arts, Entertainment, Recreation.
3. Information; Utilities; Arts, Entertainment, Recreation; Other Private Services and others, including the Accommodation, Food Services & Drinking and other Sub-Sectors.
4. Some of the monthly averages were subject to a second and final revision at the time this Appendix was published. Thus, FY 2004 Sector/Total employment data are preliminary.

SOURCE : Mississippi Department of Employment Security, LMI
Department, in cooperation with the U.S. Department
of Labor, Bureau of Labor Statistics, 2004.

Appendix G
ESTIMATED COUNTY TOURISM EXPENDITURES/EMPLOYMENT, FY 2004

COUNTY	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment %	Tourism Capital Investment&
Adams	\$93,884,206	2,360	12,860	18.4	\$6,847,612
Alcorn	40,098,811	715	13,500	5.3	903,103
Amite	1,707,844	23	1,990	1.2	NA
Attala	16,562,757	300	6,880	4.4	37,577
Benton	691,729	11	1,250	0.9	8,600
Bolivar	22,486,795	425	12,740	3.3	2,183,954
Calhoun	2,430,048	27	3,830	0.7	60,500
Carroll	1,106,965	14	1,240	1.1	NA
Chickasaw	6,965,838	85	6,690	1.3	9,990
Choctaw	1,042,503	14	2,090	0.7	NA
Claiborne	2,221,620	34	3,820	0.9	430,007
Clarke	3,555,991	55	2,950	1.9	1,600
Clay	13,342,567	218	8,130	2.7	27,129
Coahoma	111,041,895	1,370	10,420	13.1	7,349,430
Copiah	7,059,799	116	7,990	1.5	NA
Covington	3,606,890	68	5,050	1.3	500,000
De Soto	172,762,905	3,085	37,620	8.2	9,670,941
Forrest+	144,130,267	2,680	39,550	6.8	12,626,752
Franklin	714,075	11	1,710	0.6	NA
George	5,489,310	90	4,280	2.1	120,385
Greene	1,411,740	15	2,130	0.7	18,000
Grenada	36,409,842	640	11,250	5.7	6,437,677
Hancock	133,653,264	2,105	13,800	15.3	7,340,454
Harrison	1,654,343,115	26,695	93,140	28.7	192,943,701
Hinds	397,624,399	6,750	144,530	4.7	18,658,514
Holmes	4,341,252	60	3,910	1.5	18,750
Humphreys	2,055,112	25	3,430	0.7	NA
Issaquena	211,766	3	280	1.1	NA
Itawamba	8,608,328	136	5,430	2.5	60,000
Jackson	147,960,364	2,460	49,480	5.0	2,183,788
Jasper	2,969,984	41	4,240	1.0	4,135
Jefferson	1,033,938	11	1,190	0.9	NA

Appendix G (continued)

COUNTY	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment %	Tourism Capital Investment
Jefferson Davis	\$2,138,719	32	2,310	1.4	\$105,000
Jones	44,690,740	762	27,480	2.8	1,291,952
Kemper	1,592,770	21	1,830	1.1	NA
Lafayette	55,965,132	1,006	16,930	5.9	1,026,718
Lamar+	48,382,842	785	13,420	5.8	+
Lauderdale	115,803,865	1,835	37,120	4.9	2,350,701
Lawrence	2,296,259	31	3,020	1.0	7,788
Leake	9,798,355	115	6,540	1.8	120,000
Lee	229,705,613	3,645	52,070	7.0	9,030,675
Leflore	30,952,367	580	16,530	3.5	1,639,871
Lincoln	17,886,858	265	12,050	2.2	229,050
Lowndes	99,763,819	1,520	25,510	6.0	1,275,256
Madison	130,528,016	1,870	35,330	5.3	17,596,915
Marion	9,032,147	125	8,200	1.5	3,200
Marshall	8,802,554	140	6,960	2.0	500,786
Monroe	18,021,375	265	11,310	2.3	534,400
Montgomery	7,293,719	85	3,010	2.8	3,144
Neshoba#	39,372,617#	690#	14,740	NA	4,477,922
Newton	4,789,204	68	6,670	1.0	NA
Noxubee	3,740,631	45	3,510	1.3	NA
Oktibbeha	54,734,153	990	21,070	4.7	1,348,278
Panola	17,066,820	287	10,710	2.7	196,500
Pearl River	25,547,430	360	10,110	3.6	1,526,227
Perry	1,662,276	25	2,480	1.0	14,601
Pike	37,772,363	560	15,630	3.6	51,132
Pontotoc	6,516,846	85	10,490	0.8	156,059
Prentiss	5,063,599	76	9,200	0.8	67,958
Quitman	2,305,209	23	1,890	1.2	Zero
Rankin	106,728,313	2,920	52,430	5.6	13,666,591
Scott	14,647,887	206	11,380	1.8	261,761
Sharkey	1,152,147	13	1,500	0.9	NA
Simpson	9,916,839	150	7,320	2.0	NA

Appendix G (continued)

COUNTY	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment %	Tourism Capital Investment
Smith	\$1,374,306	15	3,890	0.4	\$5,444
Stone	8,555,911	105	3,790	2.8	500,149
Sunflower	9,538,885	156	10,790	1.4	223,300
Tallahatchie	1,983,803	26	2,790	0.9	5,000
Tate	9,171,504	172	6,420	2.7	385,143
Tippah	5,504,059	76	7,040	1.1	376,403
Tishomingo	7,020,728	150	5,900	2.5	2,844,973
Tunica	1,123,362,490	14,765	16,850	87.6	79,214,256
Union	9,392,909	180	8,830	2.0	18,094
Walthall	2,362,834	40	2,850	1.4	39,000
Warren	218,889,284	4,524	24,420	18.5	19,251,563
Washington	92,229,350	1,417	22,020	6.4	9,031,546
Wayne	8,100,852	105	5,450	1.9	44,916
Webster	1,768,483	22	1,970	1.1	16,129
Wilkinson	2,009,013	26	2,190	1.2	1,007,575
Winston	13,437,369	213	5,330	4.0	1,848,789
Yalobusha	1,840,197	31	3,480	0.9	44,723
Yazoo	11,005,767	155	6,770	2.3	NA
Total	\$5,732,745,147	92,400	1,116,930*	8.3	\$440,782,087

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

#Neshoba County employment figures do **not** reflect estimated Pearl River Resort full-time equivalent (FTE) figures. Estimated Neshoba County revenues do **not** include Pearl River Resort revenues.

*Total Establishment Based Employment reflects data at the county level, per the Mississippi Department of Employment Security's May 2004 Annual Averages, 2001 – Forward. This nonagricultural employment total—based on monthly averages—is **not** Residence Based. The Statewide and County Establishment Based Employment figures reflect nonagricultural monthly averages with the Statewide data comprising July 2003 – June 2004 monthly averages.

& Estimated Tourism Capital Investment (TCI) is based on data from sources responding to the survey. NA indicates not available. + Lamar County TCI is included with Forrest County as Hattiesburg area.

SOURCES: Mississippi State Tax and Mississippi Gaming Commissions; Mississippi Department of Employment Security, LMI; Jefferies & Company, Inc., New York, New York; MDOT; DFA, Bureau of Buildings and Grounds and Real Property Management; MAC; DWF&P; McGraw Hill Construction; and many other Economic Development/Tourism Offices, Chambers of Commerce, mentioned in the Acknowledgments, 2004.

Appendix H
ESTIMATED COUNTY NUMBER OF HOTEL/MOTEL ROOMS, FY 2003 FY 2004

COUNTY	HOTEL/MOTEL ROOMS (6-30-03)	HOTEL/MOTEL ROOMS (6-30-04)	PERCENTAGE CHANGE
Adams	946	919	-2.9
Alcorn	483	471	-2.5
Amite	0	15	NA
Attala	131	131	None
Benton	0	0	NA
Bolivar	425	440	3.5
Calhoun	26	44	69.2
Carroll	0	0	NA
Chickasaw	62	62	None
Choctaw	0	0	NA
Claiborne	0	0	NA
Clarke	25	25	None
Clay	195	195	None
Coahoma	780	779	-0.1
Copiah	143	143	None
Covington	93	93	None
De Soto	1,691	1,662	-1.7
Forrest	1,546	1,522	-1.6
Franklin	10	10	None
George	84	84	None
Greene	0	9	NA
Grenada	642	642	None
Hancock	1,073	1,071	-0.2
Harrison	12,351	12,349	None
Hinds	5,876	5,854	-0.4
Holmes	50	40	-20.0
Humphreys	20	0	NA
Issaquena	0	0	NA
Itawamba	55	55	None
Jackson	2,293	2,205	-3.8
Jasper	26	26	None
Jefferson	0	0	NA

Appendix H (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-03)	HOTEL/MOTEL ROOMS (6-30-04)	PERCENTAGE CHANGE
Jefferson Davis	48	69	43.8
Jones	577	577	None
Kemper	35	35	None
Lafayette	685	678	-1.0
Lamar	509	543	6.7
Lauderdale	1,525	1,641	7.6
Lawrence	31	54	74.2
Leake	56	56	None
Lee	1,548	1,573	1.6
Leflore	649	651	0.3
Lincoln	499	411	-17.6
Lowndes	820	800	-2.4
Madison	1,216	1,381	13.6
Marion	117	117	None
Marshall	202	162	-19.8
Monroe	201	201	None
Montgomery	158	116	-26.6
Neshoba	1,335	1,335	None
Newton	85	87	2.4
Noxubee	42	64	52.4
Oktibbeha	783	707	-9.7
Panola	403	403	None
Pearl River	281	286	1.8
Perry	0	0	NA
Pike	573	573	None
Pontotoc	62	56	-9.7
Prentiss	100	100	None
Quitman	0	0	NA
Rankin	1,440	1,440	None
Scott	302	193	-36.1
Sharkey	25	13	-48.0
Simpson	109	129	18.3
Smith	0	0	NA

Appendix H (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-03)	HOTEL/MOTEL ROOMS (6-30-04)	PERCENTAGE CHANGE
Stone	93	93	None
Sunflower	190	214	12.6
Tallahatchie	0	0	NA
Tate	131	131	None
Tippah	57	82	43.9
Tishomingo	154	163	5.8
Tunica	6,320	6,365	0.7
Union	282	248	-12.1
Walthall	30	30	None
Warren	1,766	1,757	-0.5
Washington	1,163	1,107	-4.8
Wayne	142	159	12.0
Webster	0	0	NA
Wilkinson	0	0	None
Winston	171	213	24.6
Yalobusha	30	30	None
Yazoo	139	138	-0.7
Total	54,110	54,027	-0.2

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2004 and January 2005, Cabin Rooms, or Condo/Timeshare rooms. The county-by-county room counts are based on figures provided by a variety of sources. In some instances, a different official furnished the data between one year and the next. Smith Travel Research inventory data were used for some FY 2004 updates, reflecting all hotel/motel properties in Smith Travel Research's Mississippi database. But most of the FY 2004 survey data came from the other sources cited below.

Some counties reflected a slight decline in their hotel/motel room inventory due to eliminating a few rooms to "make room" for other amenities, e.g., business and fitness centers.

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Hendersonville, Tennessee, 2004.