

**Fiscal Year 2009
Economic Contribution
of
Travel and Tourism
In Mississippi
February 2010**

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INTRODUCTION

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

Travel and Tourism's visibility throughout Mississippi is at an all-time high. Fifty-five local entities with a Room and/or Restaurant Tax were in place as of February 2010. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism is a \$773 billion national industry in terms of direct domestic and international expenditures with 7.7 million direct jobs, \$194.1 billion in payroll income, and \$117.3 billion in combined federal, state and local tax revenues, per the U.S. Travel Association, CY 2008 data. Travel and Tourism is a key part of Mississippi's economic development engine.

This report estimates Travel and Tourism's FY 2009 economic contribution at the state and county level. This industry is vital to Mississippi's economy, based on these estimates:

- Travel and Tourism accounted for 78,240 direct jobs—7.0 % of total statewide establishment-based employment in FY 2009—based on quarterly employment data, an 8.0 % decrease versus FY 2008. A total of 76,280 of these FY 2009 jobs, or 97.5 %, were private sector ones.
- Travel and Tourism comprised 31,760 indirect/induced jobs in FY 2009. Travel and Tourism total employment [direct + indirect + induced] was 110,000.
- FY 2009 Travel and Tourism annual payroll for direct jobs was \$1.625 billion, a \$120 million less, or a 6.9 % decrease from the \$1.745 billion annual payroll in FY 2008. The FY 2009 indirect/induced labor income was \$873 million. Total FY 2009 labor income (direct payroll plus indirect/induced labor income) was \$2.5 billion.
- Travel and Tourism ranked 5th in FY 2009 direct private sector employment, based on all sectors of Mississippi's economy.
- Travel and Tourism is one of Mississippi's largest export industries, and a major contributor to its financial affairs and quality of life.
- Without Travel and Tourism: \$357 million less in General Fund Revenues; 110,000 fewer total jobs [direct + indirect + induced]; \$2.5 billion less in total annual payroll associated with this industry; and, a decrease in the state's overall quality of life, if other industries were constant.
- \$5.6 billion in FY 2009 Travel and Tourism expenditures by visitors, a 7.0 % decrease versus \$6.0 billion in FY 2008.
- Out-of-state visitors spent \$1,600 for every man, woman and child living in Mississippi.
- In-state travelers spent \$300 for every man, woman and child living in Mississippi.
- Travel and Tourism's proportion of Mississippi's FY 2009 General Fund—\$357 million of \$4.64 billion—was 7.7 %, or \$1 of every \$13. The \$357 million was an 8.5 % decrease versus \$390 million in FY 2008 Travel and Tourism General Fund revenues.
- FY 2009 Tourism Capital Investment (TCI)—new/renovated contract construction costs—were \$278.7 million, a 59.5 % decrease from FY 2008.
- FY 2009 Travel and Tourism state taxes collected were \$407 million, a 6.8 % decrease compared to FY 2008. These FY 2009 state taxes translated to \$374 per household in tax relief, a 7.0 % decrease compared to the estimated \$402 per household in tax relief for FY 2008.
- FY 2009 state-licensed casino taxes attributed to Travel and Tourism of \$146 million, 35.9 % of Travel and Tourism state taxes collected; \$3 million/month are diverted to MDOT. Gasoline taxes are part of state Travel and Tourism taxes collected, but not the General Fund.
- FY 2009 City/County tax revenues (Room/Restaurant, state-licensed casinos, motor vehicle rental, Alcohol Beverage Control, petroleum) of \$111.7 million, a 9.9 % decrease from FY 2008.
- Estimated Return on Investment (ROI) for the state's Domestic Consumer Ad Placement and Production Costs equaled \$5.48 in FY 2009 and \$12 in FY 2008.

- Statewide hotel/motel rooms increased from 53,719 on June 30, 2008, to 56,222 on June 30, 2009, or 4.7 %. Hotels/motels totaled 652 on June 30, 2008, and 659 on June 30, 2009, + 1.1 %.
- Mississippi's estimated 19 million total visitors in FY 2009, a 5.9 % decrease from FY 2008, included the sum of overnight leisure + leisure day-trip + overnight/day business travelers + combined business leisure travelers + pass-throughs + group tour visitors.
- An estimated 10 million domestic overnight leisure visitors, 1.5 million domestic overnight business travelers, plus 1 million domestic overnight visitors for personal/other business reasons, were part of the total mix.
- 75 % of the FY 2009 visitors to Mississippi, were from out-of-state, or "Travel and Tourism Exports." They spent "new" dollars in Mississippi for goods and services, and were exports.
- An estimated 84 % of all FY 2009 household travel party expenditures were from out-of-state.
- Travel and Tourism's estimated portion of the Gross State Product (GSP) was \$4.2 billion, or 4.7% in FY 2008, and \$3.5 billion, or 4.0 % in FY 2009. This includes direct Visitor Expenditures, TCI, plus indirect and induced computations and Travel and Tourism linkages.
- FY 2009 Direct Visitor Expenditures were 2.4 % of the GSP, factoring in eventual leakage.
- FY 2009 Welcome Center registrants FY 2009 were 2,391,959, a 2.3 % increase versus the 2,337,880 for FY 2008.
- Twelve Mississippi counties with \$120 million+ in FY 2009 Travel and Tourism expenditures.
- Sixteen Mississippi counties with more than 1,200 direct Travel and Tourism jobs in FY 2009.

Estimated FY 2009 Travel and Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Travel and Tourism tax revenues and ROI figures revenues cited on pages 4-6 include leisure dollars from in-state and out-of-state Mississippi tourists/visitors. They reflect expenditures by some pass-through travelers.

METHODS

The purpose of this report was to estimate Travel and Tourism's FY 2009 statewide economic contribution in terms of Total Value Added, jobs (direct and indirect/induced), payroll (labor income), sales (expenditures), capital investment, and State tax revenue—including the General Fund portion—plus local level (city/county) indicators. County indicators include estimated Tourism jobs (direct only), expenditures and capital investment. Room/Restaurant tax revenues are presented, as part of state/local taxes for each county attributed to Tourism.

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

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

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department, via monthly NAICS code averages, July 2008 - June 2009. FY 2009 Gaming jobs/payroll data were secured from MGC quarterly surveys. An FY 2008 Outdoor Recreation Survey resulted in jobs/payroll data for a cross-section of outfitters, hunting/fishing guides, etc.

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

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 15 - 17. The focus is on Gross State Product, Total Value Added, Total Value Added to Expenditures, State-level Travel and Tourism Accounts, Employment and Labor Income Multipliers, Travel and Tourism Exports and Imports, Estimated Effective Tax Rates, and Employment Rankings.

FINDINGS

Gaming (state-licensed), Restaurant and Lodging jobs were the top three in direct Travel and Tourism Employment, in Mississippi, based on Appendix A. The 24,060 state-licensed casino gaming jobs, excluding casino hotels, represented 30.8 % of direct Travel and Tourism Employment. State-licensed casino hotel employment totals (3,100), plus the casinos, resulted in 27,160 combined direct jobs, or 34.7 % of direct Travel and Tourism jobs. All other 51,080 direct Travel and Tourism jobs equaled 65.3 % of these direct industry jobs.

Appendix A comprises Travel and Tourism direct employment breakdown by category for FY 2008 and 2009. The narrative section on page 15 summarizes data on indirect/induced jobs. Appendix B shows FY 2008 and 2009 payroll-related information by employment component. The indirect/induced labor income multipliers are presented on page 16.

Estimated Travel and Tourism expenditures by visitors were \$6 billion in FY 2008 and \$5.6 billion in FY 2009, per Appendix C. FY 2008 and 2009 estimated General Fund revenues are Appendix D. They were \$390 million in FY 2008 and \$357 million in FY 2009. Travel and Tourism's \$357 million slice of the FY 2009 General Fund was 7.7 %, from estimated Tourism Capital Investment (TCI), Travel and Tourism Personal Income, Sales Taxes and other taxes.

Appendices E and F, respectively, have estimated FY 2008/2009 county level Travel and Tourism Expenditures, direct Tourism Employment, the Tourism employment percentage, State and Local Sales Taxes attributed to Travel and Tourism, and TCI data. Appendix G presents the FY 2008 and 2009 statewide and county wide hotel/motel room data. Appendix H is a county breakdown for the state's five Tourism Regions: The Capital/River Region, The Coastal Region, The Delta Region, The Hills Region, and The Pines Region.

TRANSPORTATION

Highway Welcome Center statistics, Regional Airport data, a Motor coach snapshot and Ad Effectiveness/Visitor Profile studies are highlighted, primarily as FY 2009 snapshots.

Welcome Center Registration Data

Travel party registrants provide the Welcome Centers with trip-related information. Welcome Center registrants comprised about four-fifths of the persons serviced in FY 2009, with 2,391,959 registrants out of 2,964,425 persons serviced. Most Welcome Center registrants are U.S. residents. International travelers, in FY 2009, comprised 50,186, or 2.1 % of the 2,391,959 registrants. This proportion was 2.1 % in FY 2008 based on 48,790 international registrants.

U.S. registrants increased by 2.3 % between FY 2008 and FY 2009; the international segment increased by 2.9 %; and total registrants increased by 2.3 %, per Table 1. Louisiana, Mississippi, Alabama, Texas, Florida and Georgia held the top six spots in FY 2008/2009, per Tables 2/3. Canada had the most international registrants—34.9 % market share in FY 2008 and 32.8 % market share in FY 2009, per Tables 4/5.

Welcome Center Reservation Service

The Welcome Center Reservation Service enables travel counselors to make reservations for tourists/visitors in any hotel/motel, bed and breakfast, or campground that accepts those reservations. This Reservation Service completed its 16th year of operation in June 2009 with \$282,948 in revenue, 3,154 reservations and 3,822 room nights booked.

Regional Airport/Air Passenger Data

Mississippi's Regional/International Airports reported 1,149,098 enplanements in FY 2009, an 11.4 % decrease from FY 2008. Some of these International/Regional Airports, plus Tunica County's Airport, reported 81,643 total charter flight enplanements in FY 2009.

The Jackson-Evers International Airport enplaned 645,158 passengers, or 56.1 %, of all passengers enplaned in Mississippi. Its 40 daily nonstop flights to 12 cities/14 airports, included Atlanta, Baltimore, Charlotte, Chicago, Cincinnati, Dallas, Detroit, Houston, Memphis, Newark, Orlando, and Washington, D.C. Jackson-Evers reported \$2.9 million in capital improvement projects during FY 2009. This airport is a vital cog for the state's air traffic activity.

Gulfport-Biloxi's International Airport reported 421,322 enplanements in FY 2009 (July 2008 - June 2009), a 14.0 % decrease versus 489,972 in FY 2008. Their five carriers were ASA/Delta, American, Continental, Northwest and USAir—serve it. Cities served by the end of FY 2009: Atlanta, Charlotte, Dallas-Ft. Worth, Houston, Jacksonville, Memphis, and Tampa. They cited \$19.7 million in estimated FY 2009 capital expenditures and improvements.

FY 2009 charter flights: Gulfport-Biloxi—250 flights/32,113 passengers, with many cities in the mix: Nashville, Washington, D.C.; Hattiesburg-Laurel—22 flights/865 passengers; Golden Triangle—58 flights, 1,764 passengers; Tupelo—28 flights/1,638 passengers.

The Tunica County Airport had 45,263 total charter enplanements in FY 2009 and 435 departures. The 73 cities throughout the U.S. included Atlanta, Gulfport, New Orleans, Shreveport, West Palm Beach, among others. Some \$6.2 million in estimated net capital expenditures and improvements were made to the Tunica County Airport in FY 2009.

Motor Coach Snapshot

The FY 2009 snapshot featured feedback from 18 Tourism Partners, including two with significant motor coach activity: Harrison and Tunica County. Some 555,645 passengers were on 16,136 tours, or 34.4—on average—per tour. The 2,750 overnight tours comprised 17.0 % of total tours. Average number of nights equaled 1.6. Tour expenditures were \$51.7 million. The 555,645 reported passengers accounted for 2.9 % of 19 million statewide visitors.

Ad Effectiveness Study, FY 2009 (Source: Destination Analysts, July 2009)

The FY 2009 on-line study surveyed in-state and out-of-state households within a 400-mile radius of Mississippi. Some goals are to identify the proportion of households 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 2009 ROI was \$5.48, from Travel and 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 ad(s), divided by the Division's domestic consumer ad placement costs. It was \$12 in FY 2008. Our FY 2009 domestic consumer advertising contributed about \$12.5 million, or 3.5 %, to Travel and Tourism's \$357 million portion of Mississippi's General Fund.

Visitation rates from the 200-mile radius (21.4 %), as compared to the 201-400 mile radius (4.3 %), dominated incremental travel generated by the FY 2009 advertising campaign. No measurable incremental travel activity was attributable to residents in the 201-400 mile radius. Some 2,487 surveys were completed by in-state and out-of-state residents, with some extra sampling of households in the Atlanta, Birmingham, Little Rock and Nashville Designated Market Areas (DMAs). The Birmingham (23.8 %) and Little Rock (22.4 %) DMAs had much higher visitation rates than the Nashville (8.2 %) or Atlanta (5.5 %) DMAs. Unaided recall—seeing state Tourism ads without any visual/audio cues—indicated that TV spots were the most frequently recognized by respondents, followed by Magazine ads, Internet and Radio.

Visitor Profile Study, FY 2009 (Sources: MGC, STR, TNS, others October 2009)

Some 19 million estimated total visitors in FY 2009 overnighed in, or did a day trip to Mississippi. Motor coach travelers mentioned earlier were part of the total mix. Sources were the TNS FY 2009 Visitor Profile study, Mississippi Gaming Commission (MGC) quarterly surveys—patrons by state of origin and occupancy rates for state-licensed casino hotels; monthly Smith Travel Research (STR) surveys; Mississippi Highway Welcome Center registration data, among other sources.

TNS, the data provider, reported 81 % (4/5) as leisure travelers, or tourists; 9 % business or combined business/leisure; and 10 % personal business/other in FY 2009. Domestic overnight leisure visitors at all accommodations totaled about 10 million. Three-fourths (75%) of overnight leisure visitors were from out-of-state. Some 83 % (5/6) of all FY 2009 overnight leisure visitors came from 10 states—Mississippi, Louisiana, Alabama, Tennessee, Texas, Georgia, Florida, Illinois, Arkansas and Missouri. The top five origin DMAs were New Orleans, Jackson (Mississippi), Memphis, Columbus-Tupelo-West Point, and Atlanta.

Average annual household income for all Mississippi visitors was \$62,500, per TNS. Their average age was 47. Average travel party size was 3.1 persons. About 44 % traveled in pairs. Another 27 % traveled with children. The average number of children—for those traveling with children—was 2.3. Only 7 % of all visitors arrived by air. They spent 3.0 nights in Mississippi. Vacation activity niche characteristics varied by interest, with casino gamers the largest market.

TABLE 1

**ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY 2008 AND FY 2009**

Origin	FY 2008 Registrants	FY 2009 Registrants	Percentage Change
States	2,289,090	2,341,773	2.3%
Countries	48,790	50,186	2.9%
Total	2,337,880	2,391,959	2.3%

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

SOURCE: MDA/Tourism Division, 2009.

TABLE 2

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

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

SOURCE: MDA/Tourism Division, 2008.

TABLE 3

**HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY 2009**

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

SOURCE: MDA/Tourism Division, 2009.

TABLE 4
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY 2008

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

SOURCE: MDA/Tourism Division, 2008.

TABLE 5
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, BY 2009

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

SOURCE: MDA/Tourism Division, 2009.

GAMING

Mississippi had 30 state-licensed casinos as of June 30, 2009 versus 29 state-licensed casinos as of June 30, 2008, or +3.4 %. There were 30 state-licensed casinos as of 2/1/2010.

Gaming Revenues

Total state-licensed casino gross gaming revenues were \$2.58 billion in FY 2009, of which \$1.81 billion, or 70.1 %, were the estimated “net” tourist/visitor share. This \$1.81 billion comprised 32.4 % of the \$5.6 billion in statewide Travel and Tourism expenditures.

Mississippi's total gaming-related tax revenues were \$312.1 million in FY 2009--\$208.4 million in state receipts; \$103.7 million for cities/counties. Travel and Tourism accounted for an estimated \$146 million [of about \$208 million] and \$73 million [of about \$104 million]. Some \$172.4 million, or 82.7 % of the \$208.4 million in gross gaming state tax receipts, went into the General Fund; and \$36 million, or 17.3 %, was diverted to MDOT. Travel and Tourism's estimated slice of the \$172.4 million in General Fund gaming dollars was \$120.9 million, or 70.1 %. The \$120.9 million = 33.9 % of Tourism's \$357 million contribution to the General Fund.

FY 2008/2009 state-licensed casino gross gaming revenue market share by Gaming Region—North and South River and Coastal—comprises Table 6. Table 7 includes the percentage change in gross gaming revenue by Regions between FY 2008/2009.

Mississippi Gaming Commission (MGC) Quarterly Survey Trends

Some 72 % of all FY 2009 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per MGC data. Coahoma and Tunica County casinos in the North River Region had 82 % of out-of-state patrons, due to Arkansas, Tennessee, Illinois, Missouri, Oklahoma, Alabama, and Georgia patrons. Around 36 % of South River Region—Greenville, Natchez and Vicksburg—casino patrons came from out-of-state; e.g., Arkansas and Louisiana. And 75 % of Coastal Region casino patrons lived out-of-state; e.g., Louisiana, Florida, Alabama, Georgia and Texas.

Thirty state-licensed casinos plus casino hotels contributed to the local/state economy through an FY 2009 payroll of \$793.4 million, down 6.5 % from FY 2008. FY 2009 advertising and promotional expenditures attributed to state-licensed casinos were \$100.8 million, a 13.3 % decrease versus FY 2008. Casino patrons stayed in casino hotels in three gaming regions, per Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY 2008/2009 quarterly averages. State-licensed casino hotel rooms decreased from 12,361 (FY 2008) to 12,274 (FY 2009), or by - 0.7 %.

An estimated \$42 million in Tourism Capital Investment (TCI) for casinos/amenities were attributed to the state-licensed casinos and/or new development in FY 2009, or 15.1 % of the statewide TCI. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. and do not include land acquisition/gaming equipment, site prep.

FY 2009 quarterly casino employment data came from the MGC quarterly surveys. FY 2009 figures reflect 24,060 state-licensed casino employees and 3,100 persons employed at their hotels. These 27,160 casino + casino hotel jobs were 34.7 % of statewide direct Tourism jobs.

NonGaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$255.7 million in FY 2009, 9.5 % less than FY2008; food and beverage revenue accounted for \$476 million, - 9.7 % versus FY 2008. FY 2009 other non gaming revenue was \$163.6 million. All dollar amounts are gross sales. They are significant, but many lodging, food & beverage, and other amenities/services are complimentary.

TABLE 6
GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2008 AND FY 2009

Region	FY 2008 Gross Gaming Revenue	Percentage of FY 2008 Total	FY 2009 Gross Gaming Revenue	Percentage of FY 2009 Total
Coastal	\$1,306,711,001	46.1%	\$1,172,629,002	45.4%
North River	1,178,731,336	41.6%	1,053,877,769	40.8%
South River	351,201,002	12.4%	357,953,603	13.9%
Total	\$2,836,643,339	100.0%	\$2,584,460,374	100.0%

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2009.

TABLE 7
GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY 2008 AND FY 2009

Region	FY 2008 Gross Gaming Revenue	FY 2009 Gross Gaming Revenue	Percentage Change
Coastal	\$1,306,711,001	\$1,172,629,002	-10.3%
North River	1,178,731,336	1,053,877,769	-10.6%
South River	351,201,002	357,953,603	1.9%
Total	\$2,836,643,339	\$2,584,460,374	-8.9%

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

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2009.

TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2008

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

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

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

TABLE 9

SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2009

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

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

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2008-2009.

OUTDOOR RECREATION

Employment, payroll and revenue figures for the DWF&P, U.S. Army Corps of Engineers, Vicksburg’s National Military Park, Natchez’s National Historical Park, Natchez Trace Parkway, Corinth Civil War Interpretive Center and Brice’s Crossroads National Battlefield Site are in Appendices A - C. Table 10 lists FY 2009 park visitation. Per the MDA/Tourism Division’s Outdoor Recreation Program Manager: “The economic contribution of outdoor recreation is felt far and wide all across the state and its participant pockets are deep.” This is substantiated by two reports conducted by the U.S. Fish and Wildlife Service entitled, “2006 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation-National Overview and the State Overview. These reports came as a result of the last national census and conducted interviews of citizens’ activity rates in outdoor recreation including hunting, fishing, and wildlife watching.

In 2006 Mississippi had 534,000 citizens that participated in fishing. A total of 309,000 went hunting. And 613,000 were active in wildlife watching around their homes and 242,000 spent time and money to travel away from home to watch wildlife. Fishing expenditures totaled \$239,223,000 while hunters spent \$557,565,000. Wildlife watchers forked out \$181,759,000 for their activities. This is about some real money spent right here in Mississippi by our population. These expenditures include trip expenses for fishing and hunting totaling \$101,687,000 and \$136,193,000, respectively. Fishermen spent \$118,876,000 on equipment, while hunters spent another \$178,902,000. This is a considerable amount of money spent on these forms of outdoor recreation for a state population as small as ours. The report’s breakdown includes food and lodging, transportation, other trip costs, fishing and hunting equipment, auxiliary and special equipment. It is not defined any further than that, but the dollars spent on outdoor recreation speaks loudly.

It’s easy to see many of the obvious businesses that benefit from sales and services related to hunting, fishing, and wildlife watching. The list would contain tens of thousands of businesses from around the state. Let’s not forget motels, restaurants, grocery stores, hardware stores, lumber suppliers, oil/gas distributors, insurance agents, clothing stores, meat processors, taxidermy shops, etc. All these businesses and more take in revenue from outdoor sports persons. The final statement comes to \$978.5 million just in Mississippi. Now run 7% on that figure and see the huge contribution made by the outdoor recreation sports of hunting, fishing, and wildlife watching to this state’s overall economy.

TABLE 10

STATE PARK VISITATION, FY 2008 AND FY 2009

Park	FY 2008 Visits	FY 2009 Visits	Change
Clark Creek	7,347	7,243	-1.4%
Clarkco	75,101	68,698	-8.5%
George P. Cossar	55,370	52,043	-6.0%
Golden Memorial	456	9,978	2088.2%
Great River Road	11,071	9,973	-9.9%
Holmes County	44,420	43,063	-3.1%
Hugh White	50,307	57,417	14.1%
J.P. Coleman	81,772	92,311	12.9%
John W. Kyle	66,202	66,783	0.9%
Lake Lincoln	49,513	50,929	2.9%
Lake Lowndes	80,706	88,074	9.1%
LeFleur's Bluff	126,585	148,569	17.4%
Legion	17,940	20,752	15.7%
Leroy Percy	17,485	19,099	9.2%
Natchez	23,872	23,875	0.0%
Paul B. Johnson	133,630	138,033	3.3%
Percy Quin	74,346	72,269	-2.8%
Roosevelt	91,865	88,205	-4.0%
Shepard	7,737	7,694	-0.6%
Tishomingo	57,067	58,479	2.5%
Tombigbee	30,941	27,192	-12.1%
Trace	54,374	58,606	7.8%
Wall Doxey	54,284	58,880	8.5%
Total	1,212,391	1,268,165	4.6%

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2009.

THE BROADER VIEW AND ECONOMIC DEVELOPMENT

MDA/Tourism Division's Research Program successfully worked on the "Broader View" project—an effort to estimate Travel and Tourism's portion of the broader state economy in employment, General Fund revenues, construction activity, among other components—since the late 1990s. Mississippi's economy without Travel and Tourism, if other sectors stayed constant: \$357 million less in General Fund Revenues; 110,000 fewer total jobs [direct, indirect, induced] and \$2.5 billion less in annual payroll associated with this industry; quality of life issues, etc.

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

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

MDA/Tourism Division's Research Program estimated Travel and Tourism's Total Value Added—the contribution of an industry to GDP or GSP. This includes its proportion of the GSP, the indirect/induced share of Travel and Tourism Employment and Labor Income, the effective tax rates for personal income tax, sales tax/other taxes, plus other economic indicators.

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

Mississippi's GSP was \$89.7 billion in FY 2008 and an estimated \$89 billion in FY 2009. About ¼ of Mississippi's GSP was in Goods-Producing Sectors; ¾ in Services-Producing Sectors. Travel and Tourism's Total Value Added of Mississippi's GSP, was \$4.2 billion, or 4.7 %, in FY 2008; and \$3.54 billion, or 4.0 % in FY 2009. Travel and Tourism's 4.0 % total contribution to the GSP is lower than its Employment concentration of 7.0 % and its 7.7 % slice of General Fund Revenues. The direct portion only of FY 2009 Total Value Added to expenditures shows that 40 cents out of each Tourist Dollar spent, including TCI, eventually stays in Mississippi. Travel and Tourism's direct value added for direct visitor expenditures and TCI was \$2.26 billion in FY 2009, or 2.5 % of GSP. It was 2.4 % for direct visitor expenditures.

Food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation, TCI and transportation were part of the Travel and Tourism Industry GSP. Casino gaming, food services and drinking places, and lodging were a major portion of this Industry GSP in FY 2009. Its composite nature needs to be emphasized.

Mississippi's economy reflected a 2009 unemployment rate of 9.5 %, based on a 12-month moving average [January - December 2009], the most current data when this report was finalized. The state's civilian labor force was 1.3 million, with an average of 123,800 unemployed persons. Metropolitan Statistical Areas (MSAs) for counties with significant Travel and Tourism activity had these unemployment rates: 7.9 % for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 8.8 % for Pascagoula (Jackson and George counties); 7.6 % for Hattiesburg (Forrest, Lamar and Perry counties); and 7.5 % for Jackson (Copiah, Hinds, Madison, Rankin and Simpson counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, taken together, form a consolidated MSA with a 8.2 % unemployment rate. DeSoto County's unemployment rate was 7.4 %; Tunica County's was 15.1 %. Both are part of Memphis's MSA.

Employment Multipliers (Indirect/Induced)

IMPLAN includes the indirect (business or firm level) and the induced (personal or individual level) multipliers. Taken together—direct + indirect + induced divided by the direct contribution—provides an estimate of the employment multiplier filtered through a Social Accounting Matrix (SAM). FY 2008 and 2009 Employment Multipliers for Mississippi were 1.36 and 1.41, respectively. The 85,000 estimated statewide direct FY 2008 Travel and Tourism jobs resulted in an additional 30,790 indirect plus induced jobs, while the 78,240 statewide direct Travel and Tourism jobs in FY 2009 resulted in an additional 31,760 indirect plus induced jobs. Total FY 2009 jobs associated with Travel and Tourism were 110,000. FY 2009 Employment multipliers varied—1.51 for lodging, 1.24 for food services and drinking places, among others.

Labor Income Multipliers (Indirect/Induced)

Payroll or labor income earned by an employee results in additional money spent by the firm (indirect) and by the individual (induced). Mississippi's FY 2008 Labor Income Multiplier was 1.47 based on total labor income of \$2.56 billion—\$1.74 billion (direct) and \$822 million (indirect/induced). The FY 2009 Labor Income Multiplier for Mississippi was 1.54 with Total labor income of \$2.5 billion—\$1.63 billion (direct) and \$873 million (indirect/induced). IMPLAN codes were used to compute the FY 2008/2009 Labor Income Multipliers.

Travel and Tourism Exports and Imports

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

Out-of-state visitors spent an estimated \$4.7 billion in Mississippi, or 84.2 % of the \$5.6 billion spent by visitors in FY 2009. Mississippians spent \$2.82 billion traveling out-of-state, per estimates gleaned from several studies. Mississippians traveling within the state—50 miles or more, one-way—spent an estimated \$880 million on FY 2009 in-state trips, or 15.8 % of the \$5.6 billion spent in Mississippi. Travel and Tourism economy expenditures were \$8.4 billion with \$2.8 billion, or 1/3, spent out-of-state.

Estimated Effective Tax Rates

The Center for Policy Research and Planning, Mississippi IHL, estimates total additions to the General Fund, by tax bracket. MDA/Tourism Division Research Program estimates Travel and Tourism-related dollars from personal income taxes, sales taxes and all other taxes, plus a separate construction activity tax that go to the General Fund. An estimated \$87.4 million in Travel and Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2009, or a 5.6 % decrease. The \$8.9 million from the estimated Travel and Tourism-related construction activity tax in the General Fund was a 39.5 % decrease versus FY 2008.

Employment Rankings

Travel and Tourism ranked 5th in total estimated private FY 2009 direct employment, behind, Wholesale/Retail Trade, Manufacturing, Health Care & Social Assistance, and Professional & Business Services. Most of the direct FY 2009 Travel and Tourism jobs— 76,280 of the 78,240 statewide direct Travel and Tourism jobs—or 97.5 %—were private sector ones (hotels/motels, restaurants, casinos). The other 2.5 % were held by employees in state parks, federal parks, private outdoor recreation, airports, museums, historic sites, state/local Tourism offices, museums, performing arts centers and spectator sports sites.

Mississippi's 78,240 statewide direct Travel and Tourism jobs in FY 2009 equaled 7.0 % of all establishment-based nonfarm jobs, per Appendix F. The 85,000 statewide direct Travel and Tourism jobs in FY 2008 were 7.4 % of all jobs, per Appendix E. Nonfarm employment rankings reflect sectors/super sectors, per their definition on page 25. Table 11 is Mississippi's FY 2009 nonfarm, establishment-based employment rankings by the top sectors/super sectors.

TABLE 11

MISSISSIPPI NONFARM ESTABLISHMENT-BASED EMPLOYMENT RANKINGS,
DIRECT JOBS, TOP SECTORS/SUPER SECTORS, FY 2009

Sector	FY 2009 Establishment Based Employment	FY 2009 Employment Percentage	FY 2009 Rank
Government (1)	248,540	22.1%	1
Wholesale/Retail Trade (2)	164,875	14.6%	2
Manufacturing (3)	151,400	13.4%	3
Educational & Health Services (4)	128,865	11.4%	4
Professional & Business Services (5)	90,950	8.1%	5
Travel and Tourism (6)	78,240	7.0%	6
Leisure & Hospitality (7)	59,000	5.2%	7
Construction (8)	56,080	5.0%	8
Financial Activities	45,640	4.1%	9
Transportation&Warehouse/Utilities (9)	44,400	3.9%	10
Other Services (10)	36,185	3.2%	11
Information	13,290	1.2%	12
Mining & Logging	9,400	0.8%	13
Total Employment	1,126,865	100.0%	NA

1. Excludes an estimated 1,960 Travel and Tourism jobs funded by public monies--State Tourism Office, Regional/International Airports, Museums, Historical Sights, Performing Arts, etc. It includes all public sector employment--Health Care, Education, etc.
2. Retail Trade was the dominant component with 130,175 non-Travel and Tourism jobs. Does not include an estimated 8,025 Travel and Tourism jobs directly related to Retail Trade.
3. Durable goods comprised 98,540 jobs, or 65.1 % of Manufacturing jobs.
4. Health Care & Social Assistance was the dominant component with 114,392 jobs.
5. Excludes Travel and Tourism-related Advertising.
6. Includes Accommodations, Food Services, Amusement, Arts, Entertainment, state-licensed Casino Gaming and Recreation, Transportation, Tourism Construction, among other jobs. A portion of these jobs are not directly related to Travel and Tourism, based on the definition in the Leisure & Hospitality Super Sector. Appendix A includes a breakdown of the FY 2009 direct statewide Travel and Tourism jobs.
7. Reflects the Leisure & Hospitality employment not directly related to Travel and Tourism.
8. Excludes Travel and Tourism-related Construction.
9. Excludes Travel and Tourism-related Transportation.
10. Excludes Travel and Tourism-related Laundry Services, Passenger Car Rental, and Travel Arrangement/Reservations.

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

SOURCE: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2009.

LOCAL LEVEL INDICATORS

Local Travel and Tourism indicators include economic contribution from hotel/motel tax levies and restaurant taxes collected, petroleum tax distribution, motor vehicle rental tax diversions, alcohol beverage control (ABC), seawall taxes, and TCI permit fees.

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

Travel and Tourism's contribution to the local economy includes City/County tax revenues and permit fees. About \$73 million, or 65.3 % of the estimated \$111.7 million in City/County taxes/fees attributed to Travel and Tourism came from state-licensed casinos, with \$38.7 million, or 34.7 %, from Room/Restaurant special tax revenues, Seawall Taxes for coastal counties, ABC permit license fees, petroleum taxes, motor vehicle rentals and TCI permit fees.

MDA/Tourism's Division Research Unit tracks the estimated portion of the state sales tax returned to cities attributed to Travel and Tourism, from the 18.5 % of the 7.0 % state sales tax. FY 2009 tabulations were made for nearly 300 municipalities. It's estimated that \$39 million statewide attributed to Travel and Tourism [from the 18.5 % of the 7.0 % state sales tax] went into the city General Fund for all municipalities. City data are not published, but kept in working paper/e-format. These monies originate at the state tax level and go into the city's General Fund.

Room/Restaurant tax percentages range from 1 % to 5 %. Table 12 presents these tax percentages by jurisdiction, plus FY 2009 gross Travel and Tourism special tax revenue. About \$36 million, or $\frac{2}{3}$, of the gross FY 2009 special tax revenues were from restaurant sales, with \$17.4 million, or $\frac{1}{3}$, from lodging sales. Special gross FY 2009 tax revenues totaled \$53.4 million. Ripley received special Room/Restaurant tax revenues for the first time in FY 2009.

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

FY 2008/2009 Travel and Tourism expenditures/employment data for the 82 counties, Travel and Tourism employment percentage, state/local taxes attributed to Travel and Tourism, and TCI are in Appendices E and F. The sum of county level Travel and Tourism expenditures is less than total estimated statewide Travel and Tourism expenditures, per the footnotes.

Mississippi had 659 total hotel/motel properties as of June 30, 2009, per a county wide lodging census conducted by MDA/Tourism Division. The number of statewide hotel/motel rooms increased from 53,719 as of June 30, 2008, to 56,222 as of June 30, 2009, or 4.7 %, per Appendix G. An estimated 2,430 new statewide hotel/motel rooms were under construction between July 2009 – January 2010, or 4.3 % above June 2009 inventory levels.

Mississippi's inventory included an estimated 164 Bed & Breakfasts (B & B's) as of June 30, 2009, with 791 total B & B rooms, 707 cabin rooms, 653 condo/timeshare rooms, 12,546 recreational vehicle (RV) spaces with electricity and water, 957 camp sites without hook-up, and 130 lodges with a maximum capacity of 2,027, or 15-16, on average, per lodge.

The FY 2009 statewide average daily rate (ADR), based on STR and Tax Commission data for FY 2009, was \$75.53. Mississippi's FY 2009 statewide occupancy percent was 55.8 using STR data for corporate/franchise properties. State-licensed casino hotels had an 80.9 occupancy percent, much higher than STR data, per Table 9, but many were comped. State-licensed casino hotel rooms totaled 12,274, or 21.8 %, of FY 2009 statewide hotel/motel rooms.

Travel and Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY 2009

Twenty-eight Tourism Partners—CVB's, Tourism Commissions, Partnerships—received FY 2009 Advertising and Employment/Payroll mini-surveys for the October 2008 – September 2009 time frame. Twenty-four, or $\frac{6}{7}$, responded to both surveys, including some zeros.

FY 2009 Travel and Tourism Employment/Payroll data reflected 138 full-time equivalent staff with \$6.8 million in salaries, wages and fringe benefits. The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category. These respondents—as a whole—reflected a total estimated FY 2009 Tourism Budget of \$21.7 million.

About \$11.9 million were spent by the respondents, based on the FY 2009 Advertising survey, with \$4.57 million, or

38.5 %, on Ad Placement. Respondents spent: \$482,632 in Ad Agency retainer fees; \$481,640 in Ad Production costs; \$320,776 for Promotional items; \$320,883 for Trade Show Participation costs; \$246,443 for FAM Tours; \$390,066 for Billboard Advertising; \$703,485 for Brochure, Collateral and Other Printing; \$1,620,867 in Sponsorships and Local Events; \$709,227 for web site maintenance; and \$2,034,007 from all Grant Programs.

STATEWIDE TRAVEL AND TOURISM LINKS

Film Productions, Documentaries and Commercials

The Mississippi Motion Picture Incentive Program was successful in supporting the development of local production and attracting nationally recognized documentary production. The low minimum spend of \$20,000, one of the lowest in the country, is suited to smaller projects and local producers. The program includes a 20 % rebate for all local spend and for the wages of non-resident cast and crew, with an additional 5 % rebate added for the wages of Mississippi resident cast and crew. Along with the established tax exemptions and reductions, the Mississippi program is especially attractive to independent producers.

Incentives and work force training are essential elements in realizing the vision outlined in the ground-breaking 2003 Mississippi Film Office Agenda for the future of the film industry in Mississippi. The Agenda focuses the attention on incentives for both Hollywood and local production, seeks the creation of film industry training programs, and outlines the development of film funding for Mississippi production. With the imminent launch of the Mississippi Work Force Training curriculum, Mississippi has now taken two giant steps forward as a Southern production center, seeking to attract out-of-state production and develop Mississippi filmmaking.

In FY 2009, the Mississippi Film Office coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films, and commercials. While each project created direct economic impact and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up, and location fees all add to the total impact of filming on location. Every corner of the state saw production activity.

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

Selected State Agencies with Travel and Tourism Links: FY 2009 Operations Mini-Surveys

State agencies--Mississippi Arts Commission (MAC), Mississippi Gaming Commission (MGC), and others--furnished major objects of expenditure data. These mini-surveys estimated a portion of Travel and Tourism's "Government Expenditures", a complementary component to TCI and tourist/visitor expenditures. FY 2009 (state) Government Expenditures were about \$25 million.

The MAC reported \$894,983 in contractual services, and \$1,487,509 in subsidies, loans and grants. MGC budgeted \$2,373,724 for contractual services plus \$100,300 in subsidies, loans and grants. Our Pearl River Basin Development District had \$109,668 for contractual and \$295,373 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget reflected \$2,222,751 for contractual, plus \$590,180 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences indicated \$900,448 for contractual services and \$390,694 for subsidies, loans and grants. The Mississippi Department of Marine Resources spent \$9,216,200 for contractual services; and \$390,294 between their Seafood Marketing and Saltwater Fishing programs. During the 2008 Legislative Session the Mississippi Legislature appropriated \$6,462,000 for the purpose of providing funds for Tourism and Welcome Centers program costs, for the fiscal year beginning July 1, 2008 and ending June 30, 2009. MDOT spent \$5,304,910 to maintain Welcome Centers and Rest Areas, including contract and routine expenses.

TABLE 12

ROOM/RESTAURANT GROSS SPECIAL TAX REVENUES BY TOURISM OFFICE, FY 2009

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2009 Room Tax Revenue	Gross FY 2009 Restaurant Tax Revenue	Gross FY 2009 Total Tax Revenues
Aberdeen	1.0	1.0	\$9,985	\$56,407	\$66,392
Baldwyn	None	2.0	None	114,738	114,738
Batesville	3.0	3.0	159,137	745,602	904,739
Bay Springs	3.0	None	5,535	None	5,535
Canton	2.0	2.0	84,760	379,901	464,661
Cleveland	2.0	2.0	60,210	557,576	617,786
Clinton	2.0	None	122,854	None	122,854
Coahoma County	2.0	1.0	64,500	252,416	316,916
Columbus-Lowndes	2.0	2.0	249,530	1,284,075	1,533,605
Corinth	2.0	2.0	54,882	897,010	951,892
DeSoto County	2.0	2.0	824,035	4,681,734	5,505,769
Florence	None	2.0	None	155,586	155,586
Flowood	None	2.0	None	1,392,596	1,392,596
Greenwood	1.0	1.0	88,540	313,040	401,580
Grenada	2.0	1.0	94,198	308,734	402,932
Hancock County	2.0	None	140,837	None	140,837
Harrison County	5.0	None	5,717,171	None	5,717,171
Hattiesburg	2.0	2.0	599,003	4,046,997	4,646,000
Hernando	1.0	None	3,952	None	3,952
Holly Springs	2.0	2.0	24,032	219,115	243,147
Horn Lake	1.5	None	114,072	None	114,072
Indianola	2.0	2.0	37,833	294,331	332,164
Jackson (city)*	4.0	2.0	3,119,958	4,980,174	8,100,132
Kosciusko	2.0	None	32,832	None	32,832
Lauderdale County	2.5	None	561,557	None	561,557
Laurel	2.0	2.0	152,167	1,128,789	1,280,956
Magee	1.0	1.0	23,642	158,595	182,237
McComb	3.0	None	177,265	None	177,265
Montgomery County	2.0	None	17,328	None	17,328
Moss Point	3.0	None	384,578	None	384,578
Natchez#	3.0 plus \$2	1.5	677,740	644,215	1,321,955

Table 12 (continued)

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2009 Room Tax Revenue	Gross FY 2009 Restaurant Tax Revenue	Gross FY 2009 Total Tax Revenues
New Albany	2.0	2.0	43,895	477,129	521,024
Newton	\$1/room night	None	10,004	None	10,004
Ocean Springs	2.0	2.0	29,500	892,297	921,797
Oxford	2.0	2.0	202,915	1,646,820	1,849,735
Pascagoula	3.0	None	102,706	None	102,706
Pearl	None	2.0	None	556,440	556,440
Philadelphia	3.0	None	92,337	None	92,337
Picayune	2.0	1.0	48,795	357,997	406,792
Pontotoc	2.0	2.0	7,291	287,173	294,464
Rankin County	2.0	None	678,369	None	678,369
Richland	None	2.0	None	315,347	315,347
Ridgeland	1.0	1.0	218,766	1,033,515	1,252,281
Ripley	2.0	2.0	10,104	105,944	116,048
Southaven	1.0	None	247,992	None	247,992
Starkville	2.0	2.0	133,060	1,297,116	1,430,176
Stone County	2.0	2.0	21,861	332,343	354,204
Tishomingo County	2.0	None	21,030	None	21,030
Tunica County	3.0	3.0	700,863	1,562,876	2,263,739
Tupelo	2.0	2.0	339,170	2,774,998	3,114,168
Vicksburg	3.0	1.0	748,062	730,575	1,478,637
Washington County	1.0	1.0	118,499	480,958	599,457
West Point	1.0	1.0	20,440	182,110	202,550
Yazoo County	2.0	2.0	39,056	292,450	331,506
Total			\$17,436,848	\$35,937,719	\$53,374,567

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

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

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

SOURCE: Mississippi State Tax Commission, 2009.

Tourism Capital Investment (TCI) FY 2009 Surveys

MDA/Tourism Division Research Program updated the FY 2009 TCI data, with input from MDA/Regional Services [under the Existing Industries and Business Division]; City and County Building/Permit Departments; Tourism Offices; Chambers of Commerce; McGraw-Hill Construction/Dodge; state agencies. Appendices E and F list county level FY 2008 and 2009 TCI expenditures. TCI valuation is based on commercial permits issued and the Tourism factor for new construction and expansion and/or renovation of Tourism-related businesses/projects. Dollar amounts don't reflect announcements nor dollars spent over a multi-year period. They do reflect estimated contract construction costs and permit fees, but not land acquisition costs, site prep, planning, casino or business equipment purchasing costs, condo "flipping," furniture & fixtures, etc. Some entities don't furnish TCI data. TCI is a net Travel and Tourism figure, or estimated cost portion.

Total estimated statewide TCI in FY 2008 was \$687.6 million, based on data secured, and \$278.7 million in FY 2009, or \$409 million less—a 59.5 % decrease. Some \$186.3 million, or 66.9 % (2/3) of the FY 2009 TCI, was from private sources. The other \$92.4 million, or 33.1 %, (1/3) were public monies, from federal, state, county and city sources. State-licensed casinos, plus their amenities, accounted for \$42 million in FY 2009 TCI, or 15.1 % of the total TCI.

The Mississippi Gulf Coast accounted for \$137.5 million in FY 2009 TCI, or 49.4 % of the state's total. Museums, retail establishments, infrastructure and many others comprised this TCI. Harrison County FY 2009 TCI of \$115.7 million was 41.5 % of the state's total TCI. Jackson County TCI included several new hotels, restaurants, convenience stores, etc. Hancock County had INFINITY, a pier, restaurants and infrastructure projects.

Tunica County's \$12.1 million in FY 2009 TCI comprised casino-related and county airport improvements. Greenville/Washington County reflected \$3.9 million for FY 2009 projects such as casinos and infrastructure.

Our Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) FY 2009 TCI was \$29.3 million, or 10.5 % of the \$278.7 million. Hotel/motel projects, retail establishments, infrastructure projects (airport/others) and restaurants were in the mix.

The Hattiesburg area (Forrest/Lamar counties) reflected \$10.4 million in FY 2009 TCI. FY 2009 examples included restaurant and retail projects, hotel/motel construction and expansion efforts, state park renovations, downtown projects and other initiatives.

Tupelo's \$13.6 million for FY 2009 TCI covered retail, their regional airport, a state park, sports facilities, restaurants and hotels. DeSoto County's \$4.4 million in FY 2009 TCI comprised a new hotel, retail, restaurants, plus infrastructure. Oxford plus some Lafayette County non-city TCI was about \$1.6 million. Tishomingo County's \$1.9 million in FY 2009 TCI had extensive work on a harbor, renovations to state parks, etc. Corinth's \$1.2 million in TCI comprised retail, restaurants, a convenience store, infrastructure.

Meridian/Lauderdale County's \$10.9 million in FY 2009 TCI covered historic sites, airport infrastructure, a new hotel, new restaurants, other infrastructure, among other efforts.

Natchez reported \$10.2 million in FY 2009—a new hotel, casino-related infrastructure, plus some restaurant and B & B improvements. Vicksburg's \$7.1 million in FY 2009 TCI pertained to a new parking garage, renovations to casinos and amenities, restaurant renovations, retail and infrastructure. Pike County's \$670,000 plus in TCI featured state park repairs, hotel and restaurant expansions, and a new convenience store. Pearl River County's \$2.8 million in TCI-related projects featured a brand new hotel, plus a few smaller scale initiatives.

FY 2010 TCI—expected to decline—will continue to secure data from building/planning departments. TCI will vary in subsequent years, depending on the nature of TCI projects, the thorough scope of the data provided by the various sources, and the completed surveys returned.

Delimitations

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

Limitations

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

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

This study makes use of statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. The IMPLAN 2008 Version 3 data intersect, but are not identical with, the FY 2009 tourist/visitor data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties, cities and municipalities. Limitations at the city/county level include the difficulty in assigning percent figures in terms of tourist/visitor sales, e.g., a city/county whose restaurant sales to tourists/visitors comprise 24 % of these sales, or another city/county where the corresponding figure is 10 % of this total.

Glossary

Balance of Travel and Tourism Trade: Travel and Tourism Exports minus Tourism Imports, taking leakage into account.

Comped rooms: Lodging arrangement where the occupied room is not paid for by the guest.

Concentration Rank: Travel and Tourism as a percentage of total nonfarm establishment-based employment.

Deplanements: The number of scheduled airline passengers exiting a plane.

Enplanements: The number of scheduled airline passengers boarding a plane.

Establishment-Based Employment: Nonfarm employment at the state/county level by the establishment's location, not by the employee's place of residence.

Fiscal Year (FY) 2009: July 2008 - June 2009.

General Fund: Travel and Tourism's contribution to Mississippi's General Fund includes a portion of these revenues related to Travel and Tourism—sales tax, personal income tax, gaming fees and taxes, impact of additional labor income, construction activity tax and other taxes.

Government Expenditures: The estimated public expenditures from state agency, city and county budgets allocated for Travel and Tourism-related projects, or projects with some Travel and Tourism impact, excluding Tourism Capital Investment (TCI).

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

Gross State Product (GSP): A measurement of a state's output—the sum of value added from all industries in the state. GSP, the state counterpart of gross domestic product (GDP) for the U.S., measures the value added to U.S. production by the labor/capital in each state.

IMPLAN: A nationally recognized economic contribution model to estimate the economic activity associated with a sale of a good or service. It is the basis for estimating indirect/induced contributions. In the IMPLAN model, indirect and induced impacts are filtered through a Social Accounting Matrix (SAM).

Indirect Contribution: Secondary contribution of purchase of production by the firm (business level), holding everything else constant.

Induced Contribution: Secondary contribution from the purchases made by the workers (consumer level), holding everything else constant.

Leakage: Money that leaves an area, e.g., a state, during the various rounds of expenditures.

Metropolitan Statistical Area (MSA): Have at least one urbanized area of 50,000 or more population, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties.

Mississippi Travel and Tourism Economic Contribution Model: Estimates employment, payroll, expenditures, General Fund revenues, Capital Investment and Total Value Added. In Mississippi, it reflects Travel and Tourism's economic contributions for this rural state with coastal counties.

Multipliers: The direct contribution plus the indirect contribution plus the induced contribution divided by the direct contribution. It's an indicator of SAM linkages in the economy.

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

North American Industry Classification System (NAICS) Codes: Two-to-six digit codes in the 1997 NAICS/Standard Industrial Classification (SIC) Code United States Manual. SIC refers to what was produced by the Industry; NAICS focuses on what the employee does.

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

Sector/Super Sector: The broad two-digit NAICS category, e.g., 31 - 33 Manufacturing (super sector); 44 - 45 Retail Trade (sector under Trade, Transportation & Utilities).

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

Sub-Sectors/Industry Groups: More specific three-to-six digit categories; e.g., 311 Food Manufacturing in 31 Manufacturing; 447 Gasoline Service Stations under 44 Retail Trade.

Total Value Added: Payments to labor and capital by industry, or gross output less its intermediate inputs. Simply put, the contribution of an industry or sector to GDP or GSP.

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

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

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

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

Travel and Tourism Direct Value Added: The direct Travel-related expenditures/GSP.

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

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

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

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

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

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Community Development Foundation (Tupelo). Jamie Kennedy.

Corinth Area CVB. Kristy White, Executive Director.

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

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

Grenada, City of. Linda Smith, Planning & Zoning Department.

City of Gulfport. Gary Anderson, Deputy Building Official.

Harrison County Code Administration. Theresa Hydrick and Kelly Henderson.

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Pearl River Basin Development District. Mike Davis, Administration.

Pearl River Valley Water Supply District. Susan McMullan, Director of Finance.

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NOTE: Some of the persons thanked might be with another organization, have a different job title, or retired at the time of publication.

APPENDICES

Appendix A

**ESTIMATED TRAVEL AND TOURISM EMPLOYMENT
FY 2008 AND FY 2009**

CATEGORY	FY 2008	FY 2009	CHANGE
Food Services & Drinking Places (1)	25,262	23,800	-5.8%
Lodging (2)	14,150	13,800	-2.5%
Gaming (3)	26,800	24,060	-10.2%
Retail Trade (4)	8,235	8,025	-2.6%
Support Activities, Air Transportation (5)	1,567	1,715	9.4%
Air Passenger, Scheduled & Chartered (5)	292	297	1.7%
Scenic & Sightseeing Transportation	52	42	-19.2%
Charter Bus Industry	109	104	-4.6%
Taxi Service	32	48	50.0%
Sub-Total, Transportation	2,052	2,206	7.5%
Travel Arrangement/Reservations	357	348	-2.5%
Passenger Car Rental	183	163	-10.9%
Parking Lots & Garages	16	14	-12.5%
Advertising & Related Services	193	185	-4.1%
Laundry Services	151	139	-7.9%
Sub-Total, Other Services	900	849	-5.7%
Motion Picture Theaters	168	174	3.6%
Motion Picture & Video Production	100	121	21.0%
Museums, Historical Sights & Similar	219	213	-2.7%
Performing Arts, Spectator Sports & Related	246	258	4.9%
Mostly Public Agencies/Entities (6)	2,168	2,114	-2.5%
Construction (7)	4,700	2,620	-44.3%
TOTAL	85,000	78,240	-8.0%

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), some Residential Property Managers (NAICS 531311) plus the state-licensed casino hotel employees. Data do not include Pearl River Resort Casino employees.*
- 3. Based on Mississippi Gaming Commission quarterly survey and the data do not include state-licensed casino hotel employees. Only includes state-licensed casino employees.*
- 4. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antiques & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; Prerecorded Tape, Compact Disc and Record Stores.*
- 5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.*
- 6. The Mississippi Department of Wildlife, Fisheries & Parks--Parks Unit--are included--plus Museums/Historical Sites; Golf Courses; Outdoor Recreation--Marinas, private entities, some state/federal; and Amusement Parks & Arcades. Ditto for the U.S. Army Corps of Engineers Columbus and Vicksburg Districts; the Natchez Trace Parkway; Vicksburg Military Park; Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site. Includes the staff at Mississippi's 12 Welcome Centers, MDA/Tourism Division, Local Tourism Offices, in addition to some other State Agencies--the Mississippi Arts Commission, The Mississippi Gaming Commission, Pearl River Basin Development District, Pearl River Water Supply District, Mississippi Department of Marine Resources.*
- 7. Only reflects estimated Travel and Tourism-related construction activity.*

SOURCES: Mississippi Arts Commission, 2009.

Mississippi Department of Employment Security, LMI Department, 2009.

Mississippi Department of Marine Resources, 2009.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2009.

MDA/Tourism Division, 2009.

Mississippi Gaming Commission, 2009.

Mississippi Museum of Natural Science, 2009 (under DWF&P).

Mississippi State Tax Commission, 2009.

Pearl River Basin Development District, 2009.

Pearl River Water Supply District, 2009.

Appendix B

**ESTIMATED TRAVEL AND TOURISM PAYROLL
FY 2008 AND FY 2009**

CATEGORY	FY 2008 PAYROLL	FY 2009 PAYROLL
Food Services & Drinking Places	\$287,512,565	\$279,972,156
Lodging (1)	\$196,235,056	\$191,202,769
Gaming (2)	\$779,434,980	\$731,435,257
Retail Trade (3)	\$140,070,371	\$141,374,385
Support Activities, Air Transportation	66,021,706	73,921,357
Air Passenger, Scheduled & Chartered	8,974,379	9,803,007
Scenic & Sightseeing Transportation	905,921	799,903
Charter Bus Industry	2,268,068	2,201,851
Taxi Service	581,534	765,325
Sub-Total, Transportation	\$78,751,608	\$87,491,443
Travel Arrangement/Reservations	9,186,056	8,724,601
Passenger Car Rental	4,162,540	3,603,047
Parking Lots & Garages	231,208	227,230
Advertising & Related Services	7,464,722	7,411,593
Laundry Services	2,722,858	2,549,272
Sub-Total, Other Services	23,767,384	22,515,743
Motion Picture Theaters	1,413,764	1,538,374
Motion Picture & Video Production	2,259,756	1,794,863
Museums, Historical Sights & Similar	6,251,784	6,092,642
Performing Arts, Spectator Sports & Related	5,695,089	5,574,651
Mostly Public Agencies/Entities (4)	59,602,083	56,107,174
Construction (5)	\$164,237,076	\$100,004,989
Total	\$1,745,231,516	\$1,625,104,446

Appendix B (continued)

This Appendix Includes:

- 1. Includes the payroll of employees at state-licensed casino hotels, but not those at the Pearl River Resort casino hotels.*
- 2. Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos. Data do not reflect the estimated payroll of casino hotel employees at the Pearl River Resort.*
- 3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; Prerecorded Tape, Compact Disc and Record Stores.*
- 4. The Mississippi Department of Wildlife, Fisheries & Parks--Parks Unit--are included--plus Museums/Historical Sites; Golf Courses; Outdoor Recreation--Marinas, private entities, some state/federal; and Amusement Parks & Arcades. Ditto for the U.S. Army Corps of Engineers Columbus and Vicksburg Districts; the Natchez Trace Parkway; Vicksburg Military Park; Natchez National Historical Park; Shiloh National Military Park; Brices Crossroads National Battlefield Site. Includes the staff at Mississippi's 12 Welcome Centers, MDA/Tourism Division, Local Tourism Offices, in addition to some other State Agencies--the Mississippi Arts Commission, The Mississippi Gaming Commission, Pearl River Basin Development District, Pearl River Water Supply District, Mississippi Department of Marine Resources.*
- 5. Only reflects estimated Travel and Tourism-related construction activity.*

SOURCES: Mississippi Arts Commission, 2009.

Mississippi Department of Employment Security, LMI Department, 2009.

Mississippi Department of Marine Resources, 2009.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2009

MDA/Tourism Division, 2009.

Mississippi Gaming Commission, 2009.

Mississippi Museum of Natural Science, 2009 (under DWF&P).

Mississippi State Tax Commission, 2009.

Pearl River Basin Development District, 2009.

Pearl River Water Supply District, 2009.

Appendix C

**ESTIMATED TRAVEL AND TOURISM EXPENDITURES
BY VISITORS, FY 2008 AND FY 2009**

CATEGORY	FY 2008	FY 2009	CHANGE
Restaurants	\$918,982,665	\$835,083,147	-9.1%
Quick-Stop, Specialty Food & Grocery Stores	523,650,322	505,571,635	-3.5%
Concessions Quick Food	71,323,900	64,302,114	-9.8%
Bar & Beer Parlors	56,211,150	48,307,652	-14.1%
Lodging	591,457,678	585,207,947	-1.1%
Gaming (1)	2,035,315,603	1,813,026,645	-10.9%
Department & General Merchandise [Mdse] (NEC)	726,017,169	681,115,674	-6.2%
Other Retail, including Gasoline/Service Stations (2)	886,927,732	884,806,133	-0.2%
Fixed Facilities, Air Transportation (3)	42,816,071	29,097,266	-32.0%
Rental & Leasing, Transportation	20,483,318	18,985,223	-7.3%
Auto Repair Shops & Accessories	32,733,526	32,591,899	-0.4%
Water Passenger Transportation	125,052	148,417	18.7%
Entertainment/Recreation (4)	76,846,077	65,714,241	-14.5%
Licensing Fees—Nonresident only (5)	9,108,240	9,323,063	2.4%
Advertising Specialties	1,617,483	1,698,880	5.0%
Printing & Publishing	2,299,476	2,129,198	-7.4%
Laundries, Dry Cleaning	6,842,521	6,304,379	-7.9%
Total	\$6,002,757,983	\$5,583,413,513	-7.0%

Appendix C (continued)

This Appendix Includes:

- 1. Net Tourist/Visitor Gross Gaming Revenues for 29 state-licensed casinos in FY 2008; and 30 in FY 2009.*
- 2. Includes Apparel & Accessories; Miscellaneous Retail; Gift, Novelty & Souvenir; Sporting Goods, Bicycle & Music/Book Stores; Camera & Photographic Stores; Antique & Secondhand Stores; Cigar Stores & Stands; Drug Stores; Gaming Retail; Gasoline and Diesel Fuel at 18 cents; Gasoline Service Stations/Convenience Stores.*
- 3. Air Transportation, Air Terminal, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY 2008 and FY 2009, based on scheduled/charter passenger service and Passenger Facility Charges.*
- 4. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Public Tennis Courts; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Motion Picture Shows; Museums; State Parks, Federal & Private Outdoor Recreation.*
- 5. Only the nonresident licensing portions were computed from the Mississippi Department of Marine Resources; and DWF&P, Licensing Section.*

SOURCES: American Automobile Association Web Site, 2009.

First Sales of Petroleum Products into Mississippi for Consumption, 2009.

Mississippi Department of Marine Resources, 2009.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2009.

MDA/Energy Division, 2009.

MDA/Tourism Division, 2009.

Mississippi Gaming Commission, 2009

Mississippi State Tax Commission, 2009.

U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2009.

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

Brice's Crossroads National Battlefield Site, Natchez National Historical Park, 2009.

Shiloh National Military Park/Corinth, Vicksburg National Military Park, 2009.

Appendix D

**ESTIMATED TRAVEL AND TOURISM GENERAL FUND
REVENUES, FY 2008 AND FY 2009**

CATEGORY	FY 2008	FY 2009	CHANGE
Restaurants	\$38,580,833	\$35,058,407	-9.1%
Quick-Stop, Specialty Food & Grocery Stores	21,992,737	21,233,453	-3.5%
Concessions Quick Food	2,995,706	2,701,144	-9.8%
Bar & Beer Parlors	2,360,870	2,028,739	-14.1%
Lodging	24,826,579	24,578,190	-1.0%
Gaming (1)	139,200,000	120,926,550	-13.1%
Department & General Merchandise	30,466,886	28,600,816	-6.1%
Other Retail (2)	17,019,929	20,365,904	19.7%
Rental & Leasing, Transportation	607,366	562,945	-7.3%
Auto Repair Shops & Accessories	1,359,329	1,354,275	-0.4%
Water Passenger Transport	5,252	6,233	18.7%
Entertainment/Recreation (3)	3,024,826	2,696,079	-10.9%
Advertising Specialties	67,921	71,150	4.8%
Printing & Publishing	95,022	88,353	-7.0%
Laundries, Dry Cleaning	287,089	264,491	-7.9%
Construction Activity Tax (4)	14,645,054	8,857,000	-39.5%
Personal Income/Sales Tax (5)	92,591,830	87,367,055	-5.6%
Total	\$390,127,229	\$356,760,784	-8.5%

Appendix D (continued)

This Appendix Includes:

- 1. Approximately \$120.9 million, or 70.1% of the \$172.4 million in General Fund Gaming Fees and Tax Transfers, were the "Net" Travel and Tourism Portion. The other \$51.5 million, or 29.9%, were not attributed to Travel and Tourism. This does not include \$36 million diverted to MDOT's Bond Sinking Fund.*
- 2. Includes Apparel & Accessories; Miscellaneous Retail; Gift, Novelty & Souvenir; Sporting Goods, Bicycle & Music/Book Stores; Camera & Photographic Stores; Antique & Secondhand Stores; Cigar Stores & Stands; Drug Stores; Gaming Retail; Gasoline Service Stations/Convenience Stores. This Appendix does not include Gasoline/diesel sales @ the pump, since those monies are diverted. Gasoline sales to visitors were down significantly in FY 2009, but not reflected in this Appendix.*
- 3. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Public Tennis Courts; Motion Picture Shows; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Museums; State Parks, Federal & Private Outdoor Recreation; National Historical Areas.*
- 4. The estimated Travel and Tourism-related portion of the General Fund based on TCI.*
- 5. 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.*

*SOURCES: Center for Policy Research and Planning, Mississippi IHL, 2009.
Mississippi Department of Employment Security, LMI Department, 2009.
MDA/Energy Division, 2009.
MDA/Tourism Division, 2009.
Mississippi State Tax Commission, 2009.*

Appendix E

ESTIMATED COUNTY TRAVEL AND TOURISM EXPENDITURES, EMPLOYMENT, STATE/LOCAL TAXES AND TCI, FY 2008

County	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes/Fees Attributed to Travel and Tourism**	Tourism Capital Investment
Adams	85,762,711	2,000	15.1	\$7,518,452	\$8,552,745
Alcorn	40,104,323	700	4.9	3,190,043	1,004,651
Amite	1,868,144	20	1.0	156,245	47,234
Attala	16,280,793	300	5.4	1,246,033	199,471
Benton	801,833	10	0.8	77,283	6,550
Bolivar	27,011,340	500	3.9	2,177,536	893,221
Calhoun	2,915,499	32	1.0	228,015	8,129
Carroll	1,004,946	15	1.0	94,467	15,210
Chickasaw	4,970,929	80	1.3	371,710	53,450
Choctaw	1,052,996	14	0.7	95,316	9,260
Claiborne	2,657,295	40	1.1	217,973	586,106
Clarke	3,603,859	60	2.0	310,456	35,942
Clay	13,881,478	215	3.3	1,138,620	1,223,385
Coahoma	53,203,900	910	10.5	5,392,887	596,040
Copiah	7,685,991	125	1.5	566,849	480,482
Covington	6,198,235	80	1.5	456,880	1,698,038
DeSoto	223,495,412	3,250	6.4	18,374,766	14,000,658
Forrest ^	234,102,231	4,000	6.8	18,572,409	12,559,339
Franklin	931,026	14	0.7	88,020	39,873
George	8,785,622	110	2.3	638,637	127,240
Greene	1,286,295	13	0.6	114,875	24,262
Grenada	35,500,933	675	6.1	2,771,969	1,091,419
Hancock	167,036,611	1,930	14.3	18,133,517	4,010,057
Harrison	1,452,426,414	22,300	24.1	154,085,662	359,133,425
Hinds	338,165,580	6,550	4.6	28,684,233	47,984,599
Holmes	4,087,861	50	1.1	306,352	64,318
Humphreys	2,348,398	23	0.8	185,057	6,650
Issaquena	81,308	2	0.9	7,761	6,791
Itawamba	8,765,810	136	2.1	670,951	209,063
Jackson	139,690,292	1,860	3.5	12,702,567	9,134,028
Jasper	3,282,050	45	1.0	253,144	28,353
Jefferson	857,930	10	0.9	82,706	26,239
Jefferson Davis	2,800,975	32	1.5	216,924	4,000
Jones	48,078,771	710	2.1	3,729,388	1,191,890

Appendix E (continued)

County	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes/Fees Attributed to Travel and Tourism**	Tourism Capital Investment
Kemper	1,431,349	20	1.1	125,694	89,012
Lafayette	82,822,582	1,435	6.9	6,701,747	12,486,218
Lamar ^					^
Lauderdale	124,732,216	1,900	4.8	9,305,795	16,001,815
Lawrence	2,826,427	33	1.2	219,632	79,921
Leake	8,477,094	91	1.8	618,352	114,470
Lee	227,213,857	3,655	6.9	17,708,628	15,896,442
Leflore	44,571,245	730	4.5	3,427,556	3,449,112
Lincoln	19,799,365	265	2.1	1,450,214	82,065
Lowndes	98,259,594	1,500	5.4	7,768,563	4,625,851
Madison	161,292,027	2,100	4.5	12,694,575	29,397,633
Marion	9,596,148	120	1.5	748,068	39,214
Marshall	10,925,814	180	2.6	889,102	240,433
Monroe	15,958,031	240	2.2	1,210,027	79,996
Montgomery	6,472,759	65	2.4	523,875	244,803
Neshoba #	28,639,427	405	NA	2,192,851	2,997,688
Newton	5,611,719	75	1.1	454,175	27,403
Noxubee	4,498,489	45	1.4	376,916	43,781
Oktibbeha	59,373,176	1,000	4.8	4,731,245	3,549,755
Panola	22,999,939	315	2.6	1,919,512	2,018,308
Pearl River	20,980,119	250	2.2	1,547,410	1,325,455
Perry	2,074,819	25	1.0	169,803	12,257
Pike	30,431,267	478	2.9	2,358,327	4,036,386
Pontotoc	7,239,951	80	0.7	560,068	267,003
Prentiss	5,752,219	76	0.9	424,054	254,561
Quitman	1,216,695	13	0.8	106,763	4,950
Rankin	139,969,964	2,550	4.3	11,208,880	14,356,545
Scott	17,209,142	202	1.7	1,268,753	40,822
Sharkey	1,195,262	12	1.0	104,841	5,352
Simpson	12,457,871	160	2.0	978,770	3,502,689
Smith	1,982,581	18	0.5	161,684	57,278
Stone	6,938,585	90	2.0	555,738	353,921
Sunflower	11,051,937	170	1.6	903,908	3,076,780
Tallahatchie	1,820,386	25	0.9	152,570	5,744
Tate	9,576,363	165	2.8	729,229	76,284
Tippah	7,746,852	91	1.3	594,734	121,857

Appendix E (continued)

County	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes/Fees Attributed to Travel and Tourism**	Tourism Capital Investment
Tishomingo	10,986,630	180	3.0	847,014	2,417,756
Tunica	1,069,488,182	13,000	87.8	124,843,995	43,322,178
Union	12,110,028	190	2.1	988,930	334,523
Walthall	2,515,767	35	1.1	197,923	23,189
Warren	208,821,811	4,160	17.2	21,058,388	49,779,430
Washington	77,961,914	1,500	7.5	7,252,835	6,439,498
Wayne	7,686,238	87	1.5	560,108	313,610
Webster	2,158,169	22	1.0	172,729	5,630
Wilkinson	2,167,460	26	1.4	175,547	34,166
Winston	14,398,243	240	4.4	1,084,832	741,381
Yalobusha	2,354,469	30	1.0	205,648	54,195
Yazoo	9,412,961	140	2.3	812,967	76,832
Total	5,573,934,934	85,000	7.4	\$535,950,678	\$687,556,310

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

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Estimated Neshoba County expenditures by visitors do not include the Pearl River Resort.

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

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

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

**Estimated State and Local Travel and Tourism Taxes from Tourist/Visitor Expenditures and some other activity. Includes the 7.0 % sales tax and the 18.5 % portion diverted to cities; state-licensed casinos; seawall taxes; city-county state-licensed casino gaming tax revenues; Room/Restaurant Special Taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control (ABC) county level share of permit license fees; and available TCI local level permit fees. Data attributable to Travel and Tourism. Tax revenue data were revised for some counties.

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management;
 McGraw Hill Construction/Dodge;
 Mississippi Department of Employment Security, LMI;
 MDOT;
 Mississippi DWF&P;
 Mississippi Gaming Commission;
 Mississippi State Tax Commission;
 and many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2009.

Appendix F

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

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

Appendix F (continued)

County	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes/Fees Attributed to Travel and Tourism**	Tourism Capital Investment
Kemper	1,470,527	20	1.2	127,134	50,530
Lafayette	83,722,132	1,375	7.1	6,769,083	1,582,899
Lamar ^					^
Lauderdale	123,764,118	1,800	4.6	9,193,731	10,864,709
Lawrence	2,651,240	30	1.1	205,177	8,888
Leake	8,297,547	90	1.6	618,714	146,342
Lee	217,272,129	3,510	6.5	17,050,148	13,582,412
Leflore	40,808,080	680	4.4	3,130,242	3,496,936
Lincoln	20,121,070	270	2.2	1,450,385	2,996,287
Lowndes	89,952,996	1,320	5.0	7,136,916	1,060,040
Madison	160,201,941	1,965	4.0	12,066,708	7,116,628
Marion	9,552,058	120	1.5	692,880	29,522
Marshall	11,460,324	180	2.8	917,861	237,382
Monroe	15,685,511	225	2.2	1,184,150	30,592
Montgomery	6,420,248	65	2.4	514,422	16,628
Neshoba #	27,805,390	385	NA	2,116,747	55,253
Newton	5,144,151	70	1.1	392,890	138,911
Noxubee	3,791,736	40	1.5	324,398	33,665
Oktibbeha	59,846,879	950	4.5	4,766,426	244,140
Panola ^^	24,987,159	330	2.9	2,063,292	64,269
Pearl River	18,967,150	245	3.1	1,441,488	2,803,634
Perry	1,968,912	23	1.0	159,797	17,088
Pike	30,375,224	455	2.8	2,354,044	670,482
Pontotoc	7,059,343	80	0.8	531,771	244,887
Prentiss	6,424,086	78	1.0	468,282	24,881
Quitman	1,117,354	12	0.8	98,884	5,874
Rankin	142,660,365	2,000	3.3	11,366,149	11,015,774
Scott	16,508,895	190	1.5	1,215,475	105,908
Sharkey	1,133,543	12	1.1	97,613	3,078
Simpson	13,736,191	165	2.0	1,060,931	587,720
Smith	2,067,952	18	0.6	162,418	7,495
Stone	6,421,182	85	2.0	521,123	3,010,305
Sunflower	12,433,582	175	1.9	1,005,793	62,536
Tallahatchie	1,821,935	25	0.9	150,802	27,952
Tate	8,996,044	125	2.2	681,236	43,172
Tippah	6,418,980	75	1.1	518,728	127,558

Appendix F (continued)

County	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes/Fees Attributed to Travel and Tourism**	Tourism Capital Investment
Tishomingo	11,546,901	180	3.0	872,595	1,912,332
Tunica	915,709,363	11,240	78.6	105,547,702	12,120,921
Union	11,624,498	180	1.9	955,556	2,413,786
Walthall	2,222,817	32	1.1	175,297	2,107
Warren	209,700,963	4,010	16.2	21,068,277	7,062,981
Washington	79,608,045	1,415	6.7	7,364,177	3,876,752
Wayne	7,342,811	85	1.5	527,000	119,768
Webster	2,069,837	22	1.0	163,625	16,495
Wilkinson	2,256,903	28	1.3	179,639	7,402
Winston	13,026,026	200	3.5	983,072	556,940
Yalobusha	2,497,628	32	1.1	212,675	761,560
Yazoo	9,171,819	130	2.2	790,516	199,723
Total	5,250,299,367	78,240	7.0	\$497,036,464	\$278,730,227

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

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Estimated Neshoba County expenditures by visitors do not include the Pearl River Resort.

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

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

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

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

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

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management;
 McGraw Hill Construction/Dodge;
 Mississippi Department of Employment Security, LMI;
 MDOT;
 Mississippi DWF&P;
 Mississippi Gaming Commission;
 Mississippi State Tax Commission;
 and many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2009.

Appendix G

ESTIMATED HOTEL/MOTEL ROOM COUNT, FY 2008/FY 2009

County	Hotel/Motel Rooms (6-30-08)	Hotel/Motel Rooms (6-30-09)	Percentage Change
Adams	989	1,093	10.5%
Alcorn	415	354	-14.7%
Amite	14	14	none
Attala	131	130	-0.8%
Benton	0	0	NA
Bolivar	460	460	none
Calhoun	24	26	8.3%
Carroll	12	12	none
Chickasaw	62	62	none
Choctaw	14	14	none
Claiborne	44	44	none
Clarke	20	20	none
Clay	157	157	none
Coahoma	885	879	-0.7%
Copiah	145	137	-5.5%
Covington	93	93	none
DeSoto	2,500	2,499	none
Forrest*	2,550	2,762	8.3%
Franklin	7	0	NA
George	151	151	none
Greene	0	0	NA
Grenada	757	753	-0.5%
Hancock	831	831	none
Harrison	9,000	9,297	3.3%
Hinds	5,467	5,629	3.0%
Holmes	54	54	none
Humphreys	52	61	17.3%
Issaquena	0	0	NA
Itawamba	62	61	-1.6%
Jackson	2,592	2,718	4.9%
Jasper	26	26	none
Jefferson	0	0	NA
Jefferson Davis	67	68	1.5%
Jones	656	656	none
Kemper	26	32	23.1%

Appendix G (continued)

County	Hotel/Motel Rooms (6-30-08)	Hotel/Motel Rooms (6-30-09)	Percentage Change
Lafayette	661	699	5.7%
Lamar*			*
Lauderdale	1,642	1,911	16.4%
Lawrence	30	30	none
Leake	56	56	none
Lee	1,867	1,779	-4.7%
Leflore	760	754	-0.8%
Lincoln	402	399	-0.7%
Lowndes	856	856	none
Madison	1,785	2,052	15.0%
Marion	120	190	58.3%
Marshall	225	225	none
Monroe	153	143	-6.5%
Montgomery	139	139	none
Neshoba	1,542	1,565	1.5%
Newton	103	103	none
Noxubee	64	59	-7.8%
Oktibbeha	707	707	none
Panola	416	502	20.7%
Pearl River	134	299	123.1%
Perry	19	19	none
Pike	685	777	13.4%
Pontotoc	56	56	none
Prentiss	100	70	-30.0%
Quitman	0	0	NA
Rankin	1,782	1,938	8.8%
Scott	233	233	none
Sharkey	19	19	none
Simpson	129	194	50.4%
Smith	33	33	none
Stone	93	93	none
Sunflower	235	240	2.1%
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	82	49	-40.2%
Tishomingo	130	130	none
Tunica	6,300	6,300	none

Appendix G (continued)

County	Hotel/Motel Rooms (6-30-08)	Hotel/Motel Rooms (6-30-09)	Percentage Change
Union	200	225	12.5%
Walthall	30	30	none
Warren	1,765	2,309	30.8%
Washington	1,230	1,221	-0.7%
Wayne	150	150	none
Webster	10	50	400.0%
Wilkinson	0	12	NA
Winston	213	213	none
Yalobusha	30	30	none
Yazoo	139	139	none
Total	53,719	56,222	4.7%

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2009 and January 2010, 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 2008 and FY 2009 updates, reflecting all hotel/motel properties in Smith Travel Research's Mississippi database. Some counties reflected a slight decline in their hotel/motel room inventory due to eliminating a few rooms to "make room" for other amenities such as business and fitness centers.

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

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Hendersonville, Tennessee, 2009.

Appendix H

MISSISSIPPI'S FIVE TOURISM REGIONS

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

SOURCE: MDA/Tourism Division, 2009.

NOTES