

Fiscal Year 2005 Economic Impact

For

Tourism In Mississippi

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INTRODUCTION

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

Tourism's visibility throughout Mississippi is at an all-time high. Fifty-two local entities with a Room and/or Restaurant Tax were in place as of February 2006. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism, a \$600 billion U.S. industry with 7.3 million direct jobs per the Travel Industry Association, is a vital component of the state's economic development engine. Tourism's emergence throughout Mississippi has brought respect and attention to this industry.

This report's purpose is to estimate Tourism's economic impact at the state and county level for FY 2005. Tourism is vital to Mississippi's economy, based on these **estimates**:

- Tourism accounted for 91,700 direct jobs in FY 2005, based on quarterly employment figures. Approximately 90,337 of these jobs, or 98.5 %, were private sector ones.
- The 91,700 direct jobs were 8.2 %, or 1/12, of the total statewide nonfarm establishment-based employment in FY 2005.
- Tourism accounted for 34,800 indirect/induced jobs in FY 2005. Thus, the total FY 2005 Tourism employment (direct plus indirect plus induced) was 126,500.
- FY 2005 Tourism annual payroll for the 91,700 direct jobs was nearly \$1.7 billion. The indirect/induced labor income was about \$739 million. Thus, the total labor income (direct payroll plus indirect/induced labor income) was about \$2.4 billion.
- The Tourism Industry ranked 5th in total estimated FY 2005 direct employment, based on **all** sectors of Mississippi's economy.

- FY 2005 Tourism expenditures of \$6.35 billion, a 4.0 % increase over FY 2004.
- Tourism's proportion of Mississippi's FY 2005 General Fund—\$376 million of the \$3.78 billion General Fund—was 10.0 %, or \$1 of every \$10. The \$376 million reflected a 2.7% increase over the \$366 million in FY 2004 Tourism General Fund revenues.
- Tourism's estimated proportion of the Gross State Product (GSP) was 5.1 % in FY 2004 and 5.0 % in FY 2005, or 1/20th of the state's economy.
- Estimated FY 2005 Tourism Capital Investment was \$513.3 million. About \$197.4 million of this total, or 38.5 %, were made by state-licensed casinos.
- FY 2005 City/County Tourism tax revenues (Room/Restaurant, 18.5 % of the 7.0 % state sales tax returned to cities attributed to Tourism, Seawall Tax, state-licensed casinos) were \$155.4 million, a 3.6 % increase over FY 2004.
- Estimated FY 2005 Tourism state taxes collected were \$479 million. State-licensed casino taxes accounted for 36.3 % of the state taxes collected and a portion (1/4) are diverted. Gasoline taxes are included in Tourism state taxes collected, but not in the Tourism General Fund revenues since they are diverted.
- The FY 2005 portion of state sales tax (18.5 % of the 7.0 %) returned to cities attributed to Tourism was \$41.4 million, a 4.1 % increase over FY 2004 levels.
- Estimated Return on Investment (ROI) for the State's Domestic Consumer Ad Placement and Production Costs were \$13 in FY 2004 and \$12 in FY 2005.
- The number of statewide hotel/motel rooms increased from 54,110 in FY 2004 to 55,259 in FY 2005, or 2.1 %. Statewide hotels/motels increased from 618 as of June 30, 2004 to 633 as of June 30, 2005, or 2.4 %.

- An estimated 30 million visitors (person-stays)—sum of overnight leisure plus leisure day-trip plus overnight and day business travelers—visited Mississippi in FY 2005.
- The estimated 11.5 million overnight leisure visitors comprised 38.3 % of the 30 million total visitors (person-stays). About $\frac{3}{4}$ of the 11.5 million overnight leisure visitors to Mississippi in FY 2005 were from out-of-state.

The estimated FY 2005 Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Tourism tax revenues and ROI figures cited on pages 5 - 7 include leisure dollars from in-state and out-of-state Mississippi tourists/visitors. Data reflect the July 2004 – June 2005 fiscal year.

METHODS

The purpose of this report was to estimate Tourism's FY 2005 statewide economic impact in terms of Total Value Added, Tourism jobs (direct and indirect/induced), payroll (labor income), sales (expenditures), Capital Investment, and State tax revenue—including the General Fund portion—plus some county and city level indicators. County indicators include estimated Tourism jobs (direct only), expenditures and Capital Investment. Local Room/Restaurant tax revenues are presented, plus the portion in sales taxes returned to cities attributed to Tourism.

Other trends, e.g., Visitor Profile data, Highway Welcome Center highlights, and FY 2006 Katrina Impact Projections, are covered. Certain agencies, such as federal entities, have an October to September FY and some data reflects that period. Most of Mississippi's Convention and Visitor Bureaus are on an October-September FY as well, but the State Tax Commission compiles tax revenue information for these entities on a monthly and state FY basis. The State Tax Commission provided 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.

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

The Mississippi DWFP provided hunting/fishing licensing fees and state park jobs/revenues. Officials representing the Natchez National Historical Park and the Vicksburg National Military Park supplemented this information at the federal level. The Vicksburg headquarters and Columbus office of the U.S. Army Corps of Engineers furnished FY 2005 federal park revenue and employment data.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the MDES, LMI Department, through monthly averages by NAICS code from July 2004 - June 2005. FY 2005 Gaming jobs and payroll data were secured from the MGC quarterly surveys.

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

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

FINDINGS

Restaurant, Gaming (state-licensed) and Lodging jobs were the top three in terms of FY 2005 direct Tourism Employment, in Mississippi, based on Appendix A. Total estimated FY 2005 nongaming jobs were 68.7 % of all FY 2005 Tourism Employment. The 28,736 gaming jobs, excluding casino hotels, represented 31.3 % of FY 2005 direct Tourism Employment. When state-licensed casino hotel employment totals (4,658) are combined with the casinos, their combined total is 33,394, or 36.4 % of all direct Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY 2004 and FY 2005. The narrative section on page 26 summarizes data on indirect/induced jobs. Appendix B shows FY 2004 and FY 2005 payroll-related information by employment component. The indirect/induced labor income multipliers are presented on page 26.

Estimated Tourism expenditures were \$6.35 billion in FY 2005, per Appendix C. FY 2004 and FY 2005 estimated General Fund revenues are Appendix D. These estimated revenues totaled \$366 million in FY 2004 and \$376 million in FY 2005. Tourism's \$376 million portion of the FY 2005 General Fund was 10.0 %. It includes the estimated Tourism-related portion from construction activity, as well as Personal Income, Sales Tax and all other taxes.

Appendices E and F, respectively, have estimated FY 2004 and FY 2005 county level Tourism Expenditures, direct Tourism Employment, the countywide establishment-based, nonfarm employment figure, the Tourism employment proportion and Tourism Capital Investment data.

Appendix G presents the FY 2004/2005 statewide and countywide hotel/motel room data. Appendix H has a county breakdown for the state's five Tourism Regions: The Capital/River Region, The Coastal Region, The Delta Region, The Hills Region and The Pines Region.

TRANSPORTATION

Highway Welcome Center statistics, Regional Airport data and Ad Effectiveness/Visitor Profile trends are highlighted. These include snapshots for FY 2004 and FY 2005.

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 2005, with 2,296,805 registrants out of 2,862,349 persons serviced. The majority of Welcome Center registrants are U.S. residents. International travelers, in FY 2004, comprised 52,716, or 2.2 % of the 2,373,513 registrants. This proportion was 2.4 % in FY 2005 based on 56,224 International respondents out of 2,296,805 total Welcome Center registrants.

U.S. registrants decreased by 3.5 % between FY 2004 and FY 2005 while the International component increased by 6.7 %. Total registrants decreased by 3.2 % between FY 2004 and FY 2005, per Table 1. Louisiana, Alabama, Texas, Florida, Georgia and Tennessee held the top six spots in FY 2005, excluding Mississippi, as evidenced by Table 3. Table 5 shows Canada with the most International registrants—36.4 % market share in FY 2005, followed by England (19.4 %) and Germany (13.2 %).

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 12th year of operation in June 2005 with \$772,095 in revenue, 10,492 reservations and 14,371 room nights booked.

Regional Airport/Air Passenger Trends

Mississippi's Regional Airports reported 1,193,651 deplanements in FY 2005, a 4.0 % increase over FY 2004. The seven Regional Airports, plus Tunica County's Airport (and some others with non-scheduled service) had significant capital expenditures and improvements. Gulfport-Biloxi reported 90 charter flights in FY 2005 with 8,143 deplanements; Golden Triangle Regional Airport—30 charter flights/2,009 passengers; Hattiesburg-Laurel—16 charter

flights/1,430 passengers; Tupelo—15 charter flights/609 passengers; Meridian—6 charter flights/1,375 passengers; and Mid-Delta—1 charter flight/120 passengers.

The Tunica County Airport had 237 charter flights with 3,734 passengers in FY 2005. Twenty-four cities of origin comprised this mix, including Atlanta, Chattanooga, Chicago, Dallas, Indianapolis, Nashville, Richmond, among others. About \$8.3 million in estimated net capital expenditures and improvements were made to the Tunica County Airport in FY 2005.

Ad Effectiveness Studies, FY 2004/FY 2005 (Source: TNS, July 2005)

These studies survey households outside of, but within a 750-mile radius of, Mississippi. Some goals are to identify the proportion of households that are aware of the state's advertising, measure the incremental travel that could be attributed to the MDA/Tourism Division's advertising campaign via Return on Investment (ROI) and evaluate trip satisfaction. The estimated FY 2005 ROI was \$12, based on the Tourism General Fund revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's Domestic Consumer and Ad Placement costs. For FY 2004, the corresponding ROI was \$13. Domestic consumer advertising, in FY 2005, contributed an estimated \$25 million to Tourism's \$376 million portion of Mississippi's General Fund. This is just as significant as the estimated ROI.

Other tools measured include advertising awareness, intent to visit a destination, image ratings and commitment. FY 2005 Ads (all sources) captured the attention of three in five in-state resident respondents as well as 29 % (250-mile market), 16 % (500-mile market) and 8 % (750-mile market). An on-line survey presented the actual print ads and radio/TV commercials used in the various markets. Of these, one in four in-state residents and one in eight out-of-state residents recognized an ad. Those who recall an ad (any ad) are three times more likely to express their intent to visit (61 % recall versus 19 % do not recall).

Visitor Profile Trends, FY 2005 (Source: D.K. Shifflet & Associates, January 2006)

Some 30 million visitors (person-stays)—all Leisure plus all Business—overnight in or did a day trip to/in Mississippi in FY 2005. About 77 % of all person-stays were Leisure and 23% Business-related. Total Day Leisure person-stays were about 11.6 million; Overnight Leisure person-stays totaled 11.5 million. About 75 % of the Overnight Leisure visitors were

from out-of-state. Ninety percent of all Overnight Leisure visitors came from 10 states—Mississippi, Louisiana, Tennessee, Florida, Alabama, Texas, Georgia, Arkansas, North Carolina and Illinois. The top five origin Designated Market Areas (DMAs) were New Orleans, Memphis, Jackson (Mississippi), Atlanta and Biloxi-Gulfport. Overnight Leisure travel parties, on average, spent \$715 in Mississippi. Air travel expenditures are excluded in these indicators. Their Purpose of Stay in Mississippi was Visit Friend/Relative (29 %), Getaway Weekend (27%), General Vacation (18 %), Other Personal (14 %) and Special Event (12 %).

Median annual household income for the Overnight Leisure visitors—the segment covered throughout this paragraph—was \$56,500 (½ were above and ½ were below this level.) Their average age was 44. Retirees accounted for 20 % of this segment, but the proportion of young families (age 18-34) with children comprised 23 %. Roughly 45 % had one or more children in the household. Only three percent of all Overnight Leisure visitors arrived by air. Median auto distance traveled (one-way) for in-state visitors was 129 miles; for non-residents, it was 311 auto miles. Two-thirds stayed in hotels/motels. About 30 % of all Overnight Leisure visitors traveled from July – September. On average, they spent 2.3 nights (3.05 days) in Mississippi. The average travel party size was 2.35 persons. Over ½ (52 %) made repeated visits to their Mississippi destination in the past three years—about three/year. Casino Gaming was their top leisure activity since 45 % indicated this.

**TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY 2004 AND FY 2005**

Origin	FY 2004	FY 2005	Percentage Change
States	2,320,797	2,240,581	-3.5
Countries	52,716	56,224	6.7
Total	2,373,513	2,296,805	-3.2

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

SOURCE: MDA/Tourism Division, 2005.

TABLE 2
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY 2004

State	Visitors	Percentage of States	Percentage of Top Ten
Louisiana	491,747	21.2	25.7
Mississippi	348,478	15.0	18.2
Alabama	252,302	10.9	13.2
Texas	209,967	9.0	11.0
Florida	208,984	9.0	10.9
Georgia	120,651	5.2	6.3
Tennessee	104,903	4.5	5.5
Missouri	61,081	2.6	3.2
Illinois	59,076	2.5	3.1
Arkansas	52,691	2.3	2.8
Other	410,917	17.7	NA
Total	2,320,797	100.0	100.0

SOURCE: MDA/Tourism Division, 2004.

TABLE 3
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY 2005

State	Visitors	Percentage of States	Percentage of Top Ten
Louisiana	455,996	20.4	24.7
Mississippi	353,330	15.8	19.1
Alabama	248,519	11.1	13.4
Texas	204,980	9.1	11.1
Florida	204,784	9.1	11.1
Georgia	116,476	5.2	6.3
Tennessee	102,563	4.6	5.6
Arkansas	57,608	2.6	3.1
Illinois	53,197	2.4	2.9
Missouri	50,693	2.2	2.7
Other	392,435	17.5	NA
Total	2,240,581	100.0	100.0

SOURCE: MDA/Tourism Division, 2005.

TABLE 4
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY 2004

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

SOURCE: MDA/Tourism Division, 2004.

TABLE 5
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY 2005

Country	Visitors	Percentage of Countries	Percentage of Top Ten
Canada	20,459	36.4	42.6
England	10,910	19.4	22.7
Germany	7,417	13.2	15.4
Mexico	2,264	4.0	4.7
Holland	1,977	3.5	4.1
France	1,939	3.4	4.0
Australia	1,394	2.5	2.9
Switzerland	722	1.3	1.5
Belgium	495	0.9	1.0
South Africa	480	0.9	1.0
Other	8,167	14.5	NA
Total	56,224	100.0	100.0

SOURCE: MDA/Tourism Division, 2005.

GAMING

Mississippi had 29 state-licensed casinos as of June 30, 2005. The average number of state-licensed casinos in operation throughout FY 2005 was 29.

Gaming Revenues

Total state-licensed casino Gross Gaming revenues were about \$2.8 billion in FY 2005. Nearly \$2.2 billion of this total, or 78 %, were estimated “Net” Tourist/Visitor revenues. These “Net” Tourist/Visitor revenues comprised 34.3 % of statewide Tourism expenditures.

Mississippi’s total gaming-related tax revenues were \$334.6 million in FY 2005, with \$223.1 million in state receipts and \$111.5 million earmarked for cities/counties. Tourism accounted for an estimated \$174 million of the \$223.1 million in state receipts and \$87 million of the \$111.5 million in city/county gaming tax revenues. About 75 % of the \$223.1 million in Gross Gaming state tax receipts, or \$168.5 million, went into the General Fund; one-fourth was diverted to MDOT. Tourism’s estimated proportion of the \$168.5 million in General Fund Gaming dollars was \$131.5 million, or 78 %. The \$131.5 million comprised 35 % of Tourism’s \$376 million contribution to the state’s General Fund.

FY 2004 and FY 2005 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 2004 and FY 2005.

Mississippi Gaming Commission Quarterly Survey Trends

About 77 % of all FY 2005 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Louisiana, Oklahoma, Illinois, Tennessee and Texas, per Mississippi Gaming Commission data. Coahoma and Tunica County casinos in the North River Region had 87 % of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Oklahoma and

Alabama patrons. About 43 % of the South River Region—Greenville, Natchez and Vicksburg—casino patrons were from out-of-state; e.g., Arkansas and Louisiana, while 76 % of Coastal Region casino patrons were from out-of-state. Florida, Louisiana, Alabama and Georgia were the top four states for out-of-state Coastal Region casino patrons.

Twenty-nine state-licensed casinos contributed to the local and state economy through an FY 2005 payroll of \$889 million. The FY 2005 advertising/promotional expenditures attributed to the state-licensed casinos were \$115.5 million. Casino patrons stayed in casino hotels throughout the three Gaming regions, as evidenced by Tables 8 and 9. The number of hotel rooms presented in Tables 8 and 9 are based on FY 2004 and FY 2005 quarterly averages.

An estimated \$197.4 million dollars in Tourism Capital Investment (TCI) for facilities and other items were attributed to the state-licensed casinos and/or new development in FY 2005. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. They do not include land acquisition/gaming equipment.

Gaming Employment

FY 2005 quarterly casino employment figures came from the Mississippi Gaming Commission via their quarterly surveys. FY 2005 figures reflect 28,736 state-licensed casino employees and 4,658 persons employed at state-licensed casino hotels. These combined 33,394 jobs (casinos plus casino hotels) were 36.4 % of all statewide direct Tourism jobs.

NonGaming (Room/Food and Beverage) Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$274.2 million in FY 2005, while food and beverage revenue accounted for \$422.4 million, based on MGC data. The combined room plus food and beverage revenue at state-licensed casinos is significant. FY 2005 retail sales at all state-licensed casinos was about \$113.2 million. All these dollar amounts are gross sales.

**TABLE 6
GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2004 AND FY 2005**

Region	FY 2004 Gross Gaming Revenue	Percentage of FY 2004 Total	FY 2005 Gross Gaming Revenue	Percentage of FY 2005 Total
Coastal	\$1,221,100,661	43.9	\$1,252,219,864	44.8
North River	1,208,919,000	43.5	1,191,290,996	42.7
South River	348,675,843	12.5	350,000,000	12.5
Total	\$2,778,695,504	100.0	\$2,793,510,860	100.0

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2005

**TABLE 7
GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY 2004 AND FY 2005**

Region	FY 2004 Gross Gaming Revenue	FY 2005 Gross Gaming Revenue	Percentage Change
Coastal	\$1,221,100,661	\$1,252,219,864	2.5
North River	1,208,919,000	1,191,290,996	-1.5
South River	348,675,843	350,000,000	0.4
Total	\$2,778,695,504	\$2,793,510,860	0.5

Note: Table 6 and Table 7 reflect Gaming Revenue Region shares. Coastal revenues are for cities in Hancock and Harrison counties. North River revenues reflect a city in 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, 2005.

TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2004

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

TABLE 9
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2005

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate	REV PAR*
Coastal	13	7,296	83.5	\$65.86	\$54.99
North River	13	6,151	88.9	50.43	44.83
South River	8	811	74.6	59.20	44.16
Total/Average	34	14,258	85.3	\$58.59	\$49.98

Note: Table 8 and Table 9 figures reflect fiscal year **quarterly averages**. The REV PAR indicator is the Occupancy percent times the Average Daily Rate. A portion of the casino hotel rooms are complimentary or “comped.”

SOURCES: Mississippi Gaming Commission Quarterly Surveys, 2004-2005.

INTERNATIONAL TRAVEL

This section highlights some International Travel items for FY 2004 and FY 2005. MDA/Tourism Division began tracking International Travel to Mississippi in CY 2001 via specific surveys at certain attractions. The following information is separate from the number of International Welcome Center Registrants depicted in Tables 4 and 5.

FY 2004 and FY 2005 Visitor Sample

FY 2005 target markets were determined for 17 countries that the MDA/Tourism Division has marketing activities, e.g., England, Scotland, Wales, Ireland, Holland, France, Denmark, Belgium, Switzerland, Sweden, Norway, Austria, Germany, Japan, Australia, and Canada. Representation is from Best Choice (Germany), Lofthouse Enterprises (Europe) and Lakeview Productions (Canada). Japan is represented through Mississippi River Country.

Survey forms are sent to participating attractions on a quarterly basis to secure International Visitor data, e.g., number of visitors by country of origin for selected attractions. These attractions are located throughout the state's five Tourism Regions with cities/areas including Biloxi-Gulfport, Clarksdale, Jackson, Kosciusko and Tupelo. Table 10 data comprise complete information for FY 2004 and FY 2005 in terms of target market countries.

The number of International visitors increased by 1.4 % from FY 2004 to FY 2005, based on survey respondents. Canada reflected a significant increase between FY 2004 and FY 2005 (22.2 %); ditto for Ireland (20.0 %).

Stats Canada computes province of residence data for overnight visits by Canadians in the U.S. Nearly 42,000 Canadians overnighted in Mississippi during CY 2004, per Stats Canada. Sixty-four percent of these Canadian visitors were from Ontario.

TABLE 10
**TOP TARGET MARKETS FOR INTERNATIONAL
VISITOR ATTRACTIONS, FY 2004 AND FY 2005**

Country	FY 2004 Market Total	Target Percent FY 2004 Total	Country	FY 2005 Market Total	Target Percent FY 2005 Total
England	4,774	45.1	England	4,806	41.5
Canada	1,926	18.2	Canada	2,354	20.3
Germany	1,075	10.2	Germany	1,141	9.9
Holland	599	5.7	Holland	582	5.0
Scotland	389	3.7	Australia	412	3.6
Ireland	313	3.0	Ireland	376	3.2
Sweden	224	2.1	Scotland	354	3.1
France	222	2.1	Sweden	293	2.5
Belgium	215	2.0	Japan	250	2.2
Japan	187	1.7	France	234	2.0
Norway	178	1.6	Belgium	179	1.5
Switzerland	161	1.5	Switzerland	146	1.3
Denmark	93	0.9	Norway	141	1.2
Mexico	84	0.8	Austria	122	1.1
Wales	81	0.8	Mexico	85	0.7
Austria	62	0.6	Denmark	54	0.5
			Wales	52	0.4
Sub-Total	10,583	100.0	Sub-Total	11,581	100.0
Other	1,850	NA	Other	1,022	NA
Total	12,433	100.0	Total	12,603	100.0

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

SOURCE: MDA/Tourism Division, 2005.

OUTDOOR RECREATION

This section highlights the Mississippi DWFP and Federal data. Employment, payroll and revenue figures for the U.S. Army Corps of Engineers, Vicksburg's National Military Park and Natchez's National Historical Park are in Appendices A, B and C.

Mississippi Department of Wildlife, Fisheries and Parks (DWFP)

DWFP nonresident (tourists/visitors) revenues, based on licenses issued and total sales for all game hunting, 7-day all game hunting, archery-primitive weapon, small game hunting, freshwater fishing, among other nonresident fishing and hunting activities, were \$7,933,731 in FY 2005. The number of FY 2005 nonresident fishing and hunting licenses totaled 111,661.

Mississippi's State Parks had 234 cabins, 48 motel rooms and 1,618 campsites on 23,467 acres in FY 2005. Table 11 contrasts FY 2004/2005 park visitation. Their FY 2004 and FY 2005 employment figures are in Appendix A, with payroll data in Appendix B. Appendix C has estimated FY 2004 and FY 2005 tourism revenues from nonresident licenses and entrance fees.

Selected Federal Park and Recreation Areas

Vicksburg's National Military Park reported 584,898 FY 2005 visitors, a 21.7 % decrease from FY 2004. A significant proportion are from out-of-state and various countries. The Natchez National Historical Park accounted for 193,534 visitors in FY 2005, a 6.2 % decrease versus FY 2004. Their FY 2005 sales/fee collections are in Appendix C.

Vicksburg's District Office of the U.S. Army Corps of Engineers reported 5,068,963 FY 2005 combined visits at Arkabutla, Enid, Grenada and Sardis Lakes, an 8.2 % increase over FY 2004. Each visit, on average, lasted 5.5 hours. Columbus's Office of the U.S. Army Corps of Engineers cited 2.7 million FY 2005 total visits along the Tennessee-Tombigbee Waterway. It's estimated that 80 % (2.15 million visits) pertained to the Mississippi portion.

TABLE 11
STATE PARK VISITATION, FY 2004 AND FY 2005

Park	FY 2004 Visits	FY 2005 Visits	Percentage Change
Buccaneer	558,248	544,812	-2.4
Casey Jones	1,636	80	-95.1
Clark Creek	14,655	17,592	20.0
Clarkco	103,036	114,436	11.1
Floewood	15,720	4,088	-74.0
George P. Cossar	153,284	105,304	-31.3
Golden Memorial	4,344	4,288	-1.3
Great River Road	67,628	50,256	-25.7
Holmes County	77,260	69,804	-9.7
Hugh White	168,928	161,398	-4.5
J.P. Coleman	32,504	42,860	31.9
John W. Kyle	129,784	115,480	-11.0
Lake Lincoln	97,980	96,839	-1.2
Lake Lowndes	147,232	203,920	38.5
LeFleur's Bluff	319,996	271,640	-15.1
Legion	84,333	87,756	4.1
Leroy Percy	30,312	32,584	7.5
Nanah Waiya	10,676	4,968	-53.5
Natchez	41,808	37,908	-9.3
Paul B. Johnson	405,120	309,936	-23.5
Percy Quin	88,408	96,839	9.5
Roosevelt	187,620	173,800	-7.4
Shepard	26,648	29,072	9.1
Tishomingo	95,168	105,028	10.4
Tombigbee	44,568	50,152	12.5
Trace	115,360	113,024	-2.0
Wall Doxey	105,816	98,124	-7.3
Total	3,128,072	2,941,988	-5.9

Note: The number of state parks during FY 2005 decreased from 27 to 24.

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2005.

TOURISM'S BROADER VIEW AND ECONOMIC DEVELOPMENT

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

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

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

MDA/Tourism Division's Research Unit, with the assistance of Dr. Bob Neal, Senior Economist, Forecast and Analysis, Center for Policy Research and Planning, Mississippi Institutions of Higher Learning (IHL), estimated Tourism's Total Value Added—the contribution of an industry to GDP or GSP. This includes Tourism's proportion of the GSP, the indirect/induced impact for Tourism Employment and Labor Income, the Effective Tax Rates for Personal Income Tax, Sales Tax and other taxes, plus other economic development indicators.

The direct effects of Total Value Added from Mississippi's statewide Tourism data were matched to the pertinent IMPLAN description, e.g., gasoline stations, food services and drinking places, etc. And the result was Tourism's Total Value Added as a percentage of the state total.

Mississippi's GSP was \$71.9 billion in CY 2003 and \$76.2 billion in CY 2004. Total

Value added is the contribution of a given industry or sector to GSP. Tourism's estimated portion, or Total Value Added of Mississippi's GSP, was 5.1 % in FY 2004 and 5.0 % in FY 2005. The Tourism Industry's GSP is lower than the estimated Tourism Employment proportion (8.2 %) and Tourism's proportion of the General Fund Revenues (10.0 %) for various reasons.

Food services and drinking places, lodging, gasoline stations, recreation, other retail businesses and some contract construction, maintenance and repair work (new or expansions and/or renovations), government and transportation were part of the Tourism Industry GSP. State-Licensed Casino Gaming accounted for 35.7 % of Mississippi's Tourism Industry GSP in FY 2005. Gasoline stations comprised 9.1 % of the FY 2005 Tourism Industry GSP, while Tourism Capital Investment (TCI) made up about 5.0 %. The Tourism Industry's composite nature needs to be emphasized in this analysis.

Mississippi's economy reflected a FY 2005 unemployment rate of 6.9 %, based on a 12-month average. The state had a civilian labor force of 1,340,900, with an average of 92,000 unemployed persons throughout FY 2005. Metropolitan Statistical Areas (MSAs) for certain counties with a significant Tourism industry had lower FY 2005 unemployment rates than the state average, as follows: 5.7 % for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 6.6% for Pascagoula (Jackson and George counties); 5.7 % for Hattiesburg (Forrest, Lamar and Perry counties); and 5.7 % for Jackson (Copiah, Hinds, Madison, Rankin and Simpson counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, taken together, form a consolidated MSA. This consolidated MSA had a 6.1 % unemployment rate in FY 2005. Memphis's MSA includes DeSoto and Tunica Counties, but much of their MSA data reflect Tennessee county figures; thus, available unemployment statistics are not comparable.

Type SAM 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/Direct—they are Type SAM, or Social Accounting Matrix. The FY 2005 Type SAM Employment Multiplier for Mississippi was 1.38. This meant that the 91,700 statewide direct Tourism jobs resulted in an additional 34,800 indirect plus induced jobs. Type SAM employment multipliers varied by description—1.36 for lodging, 1.27 for food services and drinking places, among many others. The FY 2004 Type SAM Employment Multiplier for Mississippi was 1.37. Thus, the 92,400 statewide direct Tourism jobs resulted in an additional 34,268 indirect plus induced jobs.

Type SAM 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 2004 Type SAM Labor Income Multiplier was 1.43. Total labor income was \$2.4 billion--\$1.67 billion (direct) and \$719 million (indirect/induced). The FY 2005 Type SAM Labor Income Multiplier for Mississippi was 1.443. Total labor income was \$2.4 billion: \$1.67 billion (direct) and \$739 million (indirect/induced). IMPLAN codes were used to compute the FY 2004/2005 Type SAM Labor Income Multipliers.

Estimated Effective Tax Rates

The Center for Policy Research and Planning, Mississippi IHL, estimates total additions to the General Fund, by tax bracket. Thus, MDA/Tourism Division's Research Unit can estimate 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 \$85.9 million in Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2004, plus another \$11 million from the estimated Tourism-related construction activity tax.

An estimated \$86 million in Tourism-related personal income tax, sales tax and all other taxes were FY 2005 General Fund additions, flat versus FY 2004. The estimated Tourism-

related construction activity tax monies in the General Fund were \$14.4 million, based on 3.5 % of an estimated \$410 million (roughly 80 % of the FY 2005 TCI). The FY 2006 and FY 2007 Tourism-related construction activity tax monies should continue their upward growth.

Employment Rankings

The Tourism Industry ranked 5th in total estimated FY 2005 direct employment, behind Government, Manufacturing, Retail Trade and Health Care & Social Assistance. Most of the direct FY 2005 Tourism jobs—an estimated 90,337 of the 91,700 statewide direct Tourism jobs or 98.5 %—were private sector ones (hotels/motels, restaurants, casinos...). The other 1.5 % were held by employees in state parks, federal parks, regional airports, museums, historic sites, state/local Tourism offices, museums and performing arts centers and spectator sports sites. These private/public sector jobs comprise sectors, super sectors, and their components, including Leisure & Hospitality; Trade, Transportation and Utilities; Construction, etc. Table 12 presents Mississippi's total FY 2005 nonfarm employment rankings.

Mississippi's 91,700 statewide direct Tourism jobs equaled 8.2 %, or 1/12, of all statewide establishment-based nonfarm jobs. This proportion of nonfarm jobs, or Concentration Rank, was 6th nationally, behind these states—Nevada (31.5 %), Hawaii (27.1 %), Wyoming (11.2 %), Florida (10.1 %)—and Washington, D.C. (8.4 %), per the Travel Industry Association of America's (TIA) *Impact of Travel & Tourism on the U.S. & State Economies, 2005 edition*.

TABLE 12
**MISSISSIPPI NONFARM EMPLOYMENT RANKINGS,
TOP 10 SECTORS/SUPER SECTORS, FY 2005**

Sector	FY 2005 Establishment Based Employment	FY 2005 Employment Percentage	FY 2005 Rank
Government (1)	243,708	21.5	1
Trade, Transportation & Utilities (2)	221,292	19.6	2
Manufacturing (3)	179,158	15.8	3
Leisure & Hospitality (4)	125,942	11.1	4
Educational & Health Services (5)	120,633	10.7	5
Professional & Business Services	84,308	7.4	6
Construction	49,558	4.4	7
Financial Activities	46,183	4.1	8
Other Services	37,508	3.3	9
Information	14,383	1.3	10
Other (6)	8,707	0.8	NA
Total Employment (7)	1,131,380	100.0	NA

This Table Includes:

1. **All public sector** employment is included, e.g., Education, Health Care, Tourism, etc.
2. Includes Retail Trade, Wholesale Trade, Transportation & Warehousing and Utilities. Retail Trade was the dominant component with nearly 139,000 jobs.
3. Durable goods comprised about 116,500 jobs, or 65 % of Manufacturing jobs.
4. Includes Accommodations, Food Services, Amusement as well as Arts, Entertainment, state-licensed Casino Gaming and Recreation jobs. A portion of these jobs are not directly related to Tourism, based on the definition of a Tourist/Visitor on page 40. Total Leisure & Hospitality employment should be fairly close to the sum of the direct Tourism jobs, plus Tourism's indirect and induced jobs. Mississippi's estimated 91,700 direct Tourism jobs in FY 2005 resulted in an additional 34,800 indirect and induced jobs. Thus, total jobs associated with Tourism equaled 126,500. The Tourism Industry included 1,363 direct government jobs (federal, state, city/county) and 90,337 direct private sector jobs. Appendix A includes the employment breakdown for direct jobs.
5. Health Care & Social Assistance was the dominant component with nearly 105,000 jobs.
6. Natural Resources & Mining.
7. Some of the monthly averages were subject to a second and final revision at the time this Appendix was published. Thus, FY 2005 Sector/Total employment data are preliminary.

SOURCE: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2005.

LOCAL LEVEL INDICATORS

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

Portion of State Sales Taxes Returned to Cities Attributed to Tourism

Tourism's contribution to the local economy—namely, a city's General Fund—includes the 18.5 % portion of the 7.0 % state sales tax. In other words, the Mississippi State Tax Commission stipulates that 18.5 % of the total state sales tax revenue collected—with some exceptions—on business activities within a municipality, shall be allocated for distribution to the municipality and paid to the city. These monies are diverted to cities throughout the state and become part of a city's General Fund.

MDA/Tourism's Division Research Unit began tracking the estimated portion of the state sales tax returned to cities attributed to Tourism in FY 2004. This enabled our Unit to monitor an important revenue source for municipalities as well as estimate the portion of these monies that is Tourism-related. These tax revenues do not include casino gaming nor gasoline taxes.

FY 2004 computations were made for some 200 municipalities, with annual gross retail sales of \$1,000,000 more for pertinent categories, e.g., food and beverage, lodging, department stores, etc. An estimated \$39.8 million allocated to municipalities from FY 2004 state sales taxes were attributed to Tourism. This dollar amount was greater than the \$35.4 million in special lodging and room/restaurant taxes that were received by cities and counties in FY 2004.

The FY 2005 data were computed for roughly 210 municipalities, with annual gross retail sales of \$1,000,000 more for the sum of categories. An estimated \$41.4 million, allocated to municipalities from FY 2005 state sales taxes, were attributed to Tourism. This exceeded \$40.8 million in special lodging and room/restaurant taxes that were received by cities and counties.

FY 2005 contributions increased from \$39.8 million in FY 2004 to \$41.4 million in FY 2005, or by 4.1 %, per Tables 13 and 14. Data are broken down by the state's five Tourism Regions. Appendix H presents the county breakdown for each Tourism Region. The \$41.4 million attributed to Tourism comprised 12.0 % of the \$342.5 million in total statewide FY 2005 diversions to cities from sales tax collections, the same (12.0 %) proportion in FY 2004.

Room/Restaurant Tax Revenue

Room/Restaurant tax percentages range from 1 to 5. Table 15 presents these tax percentages by jurisdiction, plus the FY 2005 gross Tourism special tax revenue. About \$27.6 million, or 67.6 % (2/3), of the gross FY 2005 special tax revenues were from restaurant sales with \$13.2 million, or 32.4 % (1/3), from lodging sales. Special tax revenues totaled \$40.8 million. The Harrison County lodging tax increased from 3 to 5 % while the city of Jackson's restaurant tax increased from 1 to 2 % and its lodging tax from 1 to 4 % in FY 2005.

County Revenues and Hotel/Motel Room Data

Estimated FY 2004 and FY 2005 Tourism Revenues and Employment data for the Mississippi's 82 counties plus estimated countywide Tourism Employment and other indicators such as Tourism Capital Investment comprise Appendices E and F, respectively. The sum of these revenue figures is less than the total estimated statewide Tourism revenues per the first set of footnotes.

Mississippi's 633 total hotel/motel properties as of June 30, 2005, were 2.4 % more than the 618 total hotel/motel properties as of June 30, 2004, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms increased from a 54,110 as of June 30, 2004, to 55,259 as of June 30, 2005, or 2.1 %, per

Appendix G. It's estimated that 1,449 new statewide hotel/motel rooms were under construction between July-August 2005, or 2.6 % above June 2005 inventory levels.

Mississippi had an estimated 173 Bed & Breakfasts (B & B's) as of June 30, 2005, with 791 total B & B rooms, 523 cabin rooms, 1,522 condo/timeshare rooms and 10,282 recreational vehicle (RV) spaces with electricity and water, per the FY 2005 MDA/Tourism Division survey.

Mississippi's statewide estimated room availability, including summer 2005 construction projects, was 59,544 rooms. This included 55,259 hotel/motel rooms in place; 1,449 hotel/rooms under construction; 791 B & B rooms; 523 cabin rooms; and 1,522 condo/time share rooms. The Mississippi Gulf Coast, had 129 hotels/motels with 15,959 rooms; 21 B & B's with 102 rooms; a 400-room casino hotel under construction; 77 cabin rooms; and 1,381 condo/time share rooms. Simply put, the Mississippi Gulf Coast had a room availability of 17,919, or 30.1 % (3/10) of the statewide inventory.

The 12-month statewide average daily rate (ADR), based on STR and Mississippi State Tax Commission data through June 2005, was nearly \$60. Mississippi's estimated 12-month statewide occupancy percent was about 60.0 using STR. These STR indicators include, for the most part, corporate and franchise properties, but not the state-licensed casino hotels, whose occupancy percent (85.0) were much higher than the STR statewide figures, per Table 9. State-licensed casino hotel rooms accounted for ¼ of all statewide hotel/motel rooms in FY 2005.

Film Productions, Documentaries and Commercials

The Mississippi Film Incentive Program*, passed in 2004, was the first step in realizing the vision outlined in the groundbreaking 2003 Mississippi Film Office Agenda for the future of the film industry in Mississippi. The Agenda focuses the attention on incentives for both

Hollywood and local production, seeks the creation of film industry training programs, and outlines the development of film funding for Mississippi production. In FY 2005, we moved closer to the realization of the second phase: the design of the Mississippi Film Industry Training Center and the creation of the training curriculum. Groundbreaking on the facility should happen in the Fall of 2005.

In FY 2005, the **Mississippi Film Office** coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films and commercials. While each project created direct economic impact and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up and location fees all add to the total impact of filming on location. Every corner of the state saw production activity.

The Mississippi Film Office again sponsored the Magnolia Independent Film Festival (Starkville), the Crossroads Film Festival (Jackson), the Natchez Literary and Cinema Celebration, the Oxford Film Festival and the Tupelo Film Festival. Incentive grants were given to Mississippians for the development of film projects, to communities for the support of film festivals (Oxford, Natchez, Columbus, Jackson, Tupelo) and to film programs (Crossroads Film Society, Mississippi Film and Video Alliance) in support of Mississippi filmmakers and audiences.

* The four-point plan includes a 10% tax credit for local payroll, a 10% tax rebate for all in-state production expenditures, an expansion of tax exempt production items and a reduction of the tax on all equipment used in film production. The incentives apply to all forms of filmed entertainment: feature film, television, documentaries and commercials.

TABLE 13
PORTION OF STATE SALES TAX RETURNED TO CITIES ATTRIBUTED TO
TOURISM BY STATE TOURISM REGION, FY 2004 AND FY 2005

Region	FY 2004 Sales Tax Attributed to Tourism	Percentage of FY 2004 Total	FY 2005 Sales Tax Attributed to Tourism	Percentage of FY 2005 Total
Capital/River	\$10,840,890	27.3	\$11,122,064	26.9
Coastal	14,297,097	36.0	14,911,110	36.0
Delta	2,167,504	5.4	2,186,178	5.3
Hills	7,537,635	18.9	8,012,397	19.4
Pines	4,915,413	12.4	5,147,299	12.4
Total	\$39,758,539	100.0	\$41,379,048	100.0

NOTE: In other words, 18.5% of the total sales tax revenue collected by the Mississippi State Tax Commission—on business activities within a municipal corporation (city)—shall be allocated for distribution to the municipality and paid to the municipal corporation. This does not include state/local casino gaming tax revenues/fees nor gasoline taxes/fees.

SOURCE: Mississippi State Tax Commission, 2005.

TABLE 14
PERCENTAGE CHANGE FOR PORTION OF STATE SALES TAX
RETURNED TO CITIES ATTRIBUTED TO TOURISM BY STATE
TOURISM REGION, FY 2004 AND FY 2005

Region	FY 2004 Sales Tax Attributed to Tourism	FY 2005 Sales Tax Attributed to Tourism	Percentage Change
Capital/River	\$10,840,890	\$11,122,064	2.6
Coastal	14,297,097	14,911,110	4.3
Delta	2,167,504	2,186,178	0.9
Hills	7,537,635	8,012,397	6.3
Pines	4,915,413	5,147,299	4.7
Total	\$39,758,539	\$41,379,048	4.1

NOTE: Appendix H includes the counties comprising each Tourism Region.

SOURCE: Mississippi State Tax Commission, 2005.

TABLE 15
**ROOM/RESTAURANT GROSS SPECIAL
TAX REVENUES BY TOURISM OFFICE, FY 2005**

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2005 Room Tax Revenue	Gross FY 2005 Restaurant Tax Revenue	Gross FY 2005 Total Tax Revenues
Aberdeen	1.0	1.0	\$12,242	\$60,599	\$72,841
Batesville	3.0	3.0	113,477	650,570	764,047
Bay Springs	3.0	None	5,906	None	5,906
Canton	2.0	2.0	67,179	352,369	419,548
Cleveland	2.0	2.0	83,664	438,908	522,572
Clinton	2.0	None	81,321	None	81,321
Coahoma County	2.0	1.0	85,535	217,573	303,108
Columbus-Lowndes	2.0	2.0	178,952	1,072,668	1,251,620
Corinth	2.0	2.0	44,652	742,719	787,371
DeSoto County	2.0	2.0	530,954	3,469,198	4,000,152
Florence	None	2.0	None	129,727	129,727
Flowood	None	2.0	None	1,041,497	1,041,497
Greenwood	1.0	1.0	56,250	284,402	340,652
Grenada	2.0	1.0	107,735	265,890	373,625
Hancock County	2.0	None	153,107	None	153,107
Harrison County	5.0	None	5,940,137	None	5,940,137
Hattiesburg	2.0	2.0	415,072	3,175,301	3,590,373
Hernando	1.0	None	9,876	None	9,876
Holly Springs	2.0	2.0	35,162	191,049	226,211
Horn Lake	1.5	None	23,498	None	23,498
Indianola	2.0	2.0	24,223	184,029	208,252
Jackson (city)	4.0	2.0	1,310,373	3,856,981	5,167,354
Kosciusko	2.0	None	23,000	None	23,000
Lauderdale County	2.5	None	441,597	None	441,597
Laurel	2.0	2.0	88,460	914,568	1,003,028
Magee	1.0	1.0	12,056	145,815	157,871
McComb*	3.0	None	None	None	None
Montgomery County	2.0	None	19,084	None	19,084
Moss Point	3.0	None	267,524	None	267,524
Natchez	3.0	1.5	285,643	549,481	835,124

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2005 Room Tax Revenue	Gross FY 2005 Restaurant Tax Revenue	Gross FY 2005 Total Tax Revenues
New Albany	2.0	2.0	\$33,609	\$393,818	\$427,427
Newton	2.0	None	13,414	None	13,414
Ocean Springs	2.0	None	30,176	None	30,176
Oxford	2.0	2.0	123,926	1,289,089	1,413,015
Pascagoula*	3.0	None	None	None	None
Pearl#	None	2.0	None	None	None
Philadelphia	3.0	None	88,701	None	88,701
Picayune	2.0	1.0	29,888	263,127	293,015
Pontotoc@	2.0	2.0	None	None	None
Rankin County	2.0	None	359,132	None	359,132
Richland	None	2.0	None	268,799	268,799
Ridgeland	1.0	1.0	141,620	755,157	896,777
Southaven	1.0	None	87,370	None	87,370
Starkville	2.0	2.0	87,233	1,014,955	1,102,188
Stone County	2.0	2.0	17,008	215,819	232,827
Tishomingo County	2.0	None	21,779	None	21,779
Tunica County	3.0	3.0	763,892	1,752,797	2,516,689
Tupelo	2.0	2.0	302,674	2,309,187	2,611,861
Vicksburg	3.0	1.0	589,640	636,525	1,226,165
Washington County	1.0	1.0	68,945	483,391	552,336
West Point	1.0	1.0	15,193	174,549	189,742
Yazoo County	2.0	2.0	27,875	254,005	281,880
Total			\$13,218,754	\$27,554,562	\$40,773,316

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.

*McComb and Pascagoula began collecting their Lodging Taxes on August 1, 2005, which corresponds to FY 2006. Thus, no dollar amounts were recorded.
 @ Pontotoc began collecting their local Taxes in December 2005, per an update.
 #This is a Restaurant Tax District near the Bloomfield Development where the Bass Pro Shop and Trustmark Stadium—home to the Mississippi Braves—are located. The Restaurant Tax District was approved by Pearl voters on September 13, 2005, or Fiscal Year 2006. Thus, no dollar amounts were recorded.

SOURCE: Mississippi State Tax Commission, 2005.

Tourism Capital Investment (TCI) FY 2005 Surveys

MDA/Tourism Division's Research Unit, with the assistance of MDA/Regional Services Division, Tourism Offices, Chambers of Commerce, state agencies, McGraw Hill Construction, among others, updated the FY 2005 TCI data, after the initial FY 2004 survey. Appendix E presents the estimated FY 2004 TCI expenditures by county, reflecting new construction and expansion and/or renovation of Tourism-related businesses/projects from antique stores to zoos; the estimated FY 2005 TCI county-by-county expenditures are in Appendix F. These dollar amounts do not reflect announcements nor dollars spent over a multi-year period. They primarily reflect estimated contract construction costs and permit fees, and some site prep costs, but do not include land acquisition costs, nor equipment costs. TCI, for the most part, presents a "net" Tourism-related figure, or a portion of the estimated cost.

Total estimated statewide TCI in FY 2004 was \$435.8 million, based on information secured, and \$513.3 million in FY 2005. The FY 2005 survey effort was more thorough and focused due to lessons learned from year one. Approximately \$411.6 million, or about 80 % of the FY 2005 TCI was from private sources. The other \$101.7 million, or roughly 20 %, comprised public monies, including federal, state, county and city sources. State-licensed casinos, including amenities, accounted for some \$197.4 million in FY 2005 TCI, or 38.5 % of the \$513.3 million TCI.

The Mississippi Gulf Coast accounted for \$222 million in FY 2005 TCI, or 43 % of the state's total. Condos, museums, casinos, retail establishments, infrastructure and many others comprised this TCI. This represents a portion of a much larger dollar amount that's expected to be spent over the next four years in post-Katrina projects.

Tunica County's estimated \$113 million in FY 2005 TCI comprised 22 % of the statewide TCI total. Casino-related development, a new hotel, other amenities, plus Airport-related infrastructure comprised much of Tunica County's TCI.

The Metro Jackson Area's (Hinds-Madison-Rankin counties) TCI was roughly \$60.4 million, or about 11.8 % of the \$513.3 million figure. New hotel and expansion/renovation projects, retail establishments, plus infrastructure projects (airport and others) and parks were in the mix, coupled with many other completed and on-going projects.

Vicksburg had \$24.1 million in estimated FY 2005 TCI between historic homes/sites, downtown landscaping/beautification, retail initiatives, casino-related projects, among others. They have reported a number of Tourism-specific projects in the past two years.

The Hattiesburg area (Forrest/Lamar counties) reflected \$27.3 million in FY 2005 TCI, more than double the FY 2004 estimate. FY 2005 examples included numerous restaurant and retail projects, hotel/motel construction and expansion, state park renovations and rails-to-trails.

DeSoto County (retail and infrastructure) and Tupelo (lodging and infrastructure) should be positioned for continued TCI. Tupelo's downtown area, in particular, has major projects coming to fruition. Tishomingo County had additional second home construction with TCI implications. They were cooperative in furnishing this plus additional information, as were other CVB's, Cities, Counties, Chambers, Tourism and Regional Offices mentioned above and below.

Aberdeen, Corinth, Oxford and Ripley were other north Mississippi cities with various TCI projects. Aberdeen had several fast food restaurants plus a B & B. Corinth's depot renovation and new movie theater were among its projects. Oxford's numerous retail projects and some hotel-related endeavors, plus Ripley's restaurants and other businesses were cited.

Contacts in Cleveland (retail and other projects); Grenada (golf course, campgrounds); Indianola (retail, some renovations); and Louisville (retail and other projects) were helpful. Ditto for Pike County/city data, plus information from other parts of the state.

State agencies—DFA, Bureau of Building, Grounds and Real Property Management; MDOT; the DWFP; the MGC, among others—were most helpful.

McGraw Hill Construction identified new FY 2005 TCI construction and renovations at the county level. It is anticipated that they will continue to do so for the FY 2006 TCI project.

The FY 2006 TCI survey will be done between July – November 2006. The \$513.3 million estimate for FY 2005 helped present a broader overview beyond tourist/visitor expenditures, tax revenues and other indicators. This figure will vary in subsequent years, depending on the nature of TCI projects, the thorough scope of the data provided by the various sources and the completed surveys returned to our office.

Delimitations

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

Limitations

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

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

This study does make use of statewide employment and labor income multipliers, but not county level multipliers. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties, cities and municipalities. Limitations at the county level include the difficulty in assigning percent figures in terms of tourists/visitors, e.g., a coastal county whose restaurants may cater to a clientele where tourists/visitors comprise 3/5 of the patrons or another county where tourists/visitors comprise only 15 % of the restaurant customers.

Glossary of Terms

Concentration Rank: Tourism measured as a percent of total nonfarm employment.

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

Fiscal Year: For purposes of this study, the fiscal year is July 2004 – June 2005.

General Fund: Tourism's contribution to Mississippi's General Fund includes a portion of these revenues related to Tourism—Sales Tax, Personal Income Tax, Gaming Fees and Taxes, Impact of Additional Labor Income, Construction Activity Tax and other taxes.

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: A measurement of a state's output; it is the sum of value added from all industries in the state. GSP is the state counterpart to the gross domestic product (GDP).

IMPLAN: A nationally recognized economic impact model to estimate the economic activity associated with a sale of a good or service. It is the basis for indirect/induced impacts.

Indirect Impact: Secondary impact of purchase of production by the firm (business level).

Induced Impact: Secondary impact from the purchases made by the workers (consumer level).

Mississippi Tourism Model: This model estimates Tourism employment, payroll, expenditures, General Fund revenues and Capital Investment for categories such as lodging, food services and drinking places, casino gaming, retail trade, etc. It best reflects economic impact for a rural state with coastal counties.

Net Tourist/Visitor Sales and Tax Revenues: The estimated portion of tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales (Tourist/Visitor expenditures) and 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 that reflect private and public sector categories by type of economic activity.

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

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

Total Value Added: The gross output of an industry or a sector less its intermediate inputs. In other words, the contribution of an industry or sector to GDP or GSP.

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

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

Tourism Industry GSP: The Total Value Added of Tourism's composite nature expressed as its industry contribution to GSP. In other words, Tourism's Total Value Added/GSP.

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

Travel Economic Impact Model (TEIM): Developed and operated by the Travel Industry Association of America (TIA), it provides annual estimates of travel's economic impact in the U.S. It covers NAICS codes and examines round trips of 100 miles or more.

Type SAM (Social Accounting Matrix) Multipliers: The direct impact plus the indirect impact plus the induced impact/the direct impact.

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The Mississippi Development Authority (MDA)/Tourism Division, Research Unit, acknowledges the following agencies, associations, companies and individuals with heartfelt thanks and appreciation for providing timely information in areas of expertise.

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

MDA/Energy Division. Janis Hill, Associate Manager, Grants Program.

Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department. Mary Willoughby, State Labor Market Analyst.

Mississippi Department of Wildlife, Fisheries and Parks (DWFP). Ted C. Brown, Bureau Director, Accounting & Finance – Parks Division. Kathy Harris, Director of Licensing.

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

Mississippi Restaurant Association. Mike Cashion, Executive Director.

Mississippi State Tax Commission. Jennifer Wentworth, Director of Accounting; Nicole Kendrick, Accountant/Auditor; Jerrod Pitts, Accountant; George Higdon, Director, Petroleum Tax Division.

Natchez Trace Parkway. Artis Griffin, Director, Human Resources.

Regional and Tunica County Airports:

Golden Triangle Regional Airport. Mike Hainsey, Assistant Director.

Gulfport-Biloxi International Airport. Monica Maturri, Director of Finance and Administration.

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

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

Meridian Airport Authority. Debbie Moulds, Executive Assistant.

Mid-Delta Regional Airport. Frank Cooper, Director.

Tunica County Airport. Cliff Nash, Executive Director.

Tupelo Municipal Airport. Margot Ganaway, Executive Assistant.

South Carolina Department of Parks, Recreation and Tourism. Julie Flowers, State Tourism Economist.

Statistics Canada. Joanne Hans, Account Executive, Central Region.

TNS Travel & Transport, Northridge, California. Rick Cain, VP, Account Executive; Jeanette Dino, Project Director; Ruth Sharp, VP, Analytical Services.

Tourism Capital Investments:

Aberdeen Visitors Bureau. Susan Evans, Executive Director.

Amory Main Street, Inc. Jean Pinkley, Director.

B. B. King Museum Foundation. Leslee J. Linn, Project Coordinator.

Bed & Breakfast Association of Mississippi. Loren Quart, Executive Director.

Brandon, City of. Lauren Banaka, Community Development.

Chickasaw County Development Foundation. Joyce East, Executive Director.

Cleveland Tourism Commission. Cheryl Line, Director.

Cleveland, City of. David Work, Mayor.

Clinton, City of. Tammie Roberson, Community Development.

Community Foundation of Northwest Mississippi. Peggy Linton, Community Development Director.

DeSoto County Tourism Association. Kim Terrell, Executive Director; Susan Fernandez, Sales Coordinator.

Eastport Marina, Iuka. Kenny Schaper.

Flowood, City of. Keith Marshall, Building & Permit Department.

Grenada, City of. Stanley Deshazier.

Grenada Tourism Commission. Tonja Ray-Smith, Executive Director; Marnie Cobern, Assistant.

Hammons & Associates, Greenwood. Hilda McKibbin, Vice President/CFO.

Hattiesburg CVB. Patrick Bell, Director of Tourism.

Hazlehurst Chamber of Commerce. Randall Day, Executive Director.

Holly Springs Tourism Bureau. James Thomas, Executive Director.

Leake County Chamber – Industrial Development Association. Renodda Dorman.

Louisville/Winston County Chamber of Commerce. Linda Skelton, Director.

McGraw Hill Dodge Construction, Lexington, Massachusetts. Louis Centorcelli.

Madison, City of. Steve Vassallo.

Magnolia, City of. Jim Storer, Mayor.

Meridian, City of. Maureen Lofton, Assistant for Governmental Affairs.

Mississippi Department of Finance and Administration (DFA). David L.

Anderson, Director; Heyward C. Bell, Architect, Bureau of Building, Grounds and Real Property Management.

Mississippi Department of Transportation (MDOT). Al Brantley, P.E., Assistant Planning Engineer; Ginger Donovan, Transportation Planner.

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MDA/Economic Development Office. John Helms, Research Bureau Manager.

MDA/Existing Industry & Business Division. Lanny McKay, Manager, Manufacturers' Cross-Match.
MDA/Regional Services Division. Steve Hardin, Director, and Regional Offices. Mississippi Institutions of Higher Learning, Center for Policy Research and Planning. Dr. Bob Neal, Senior Economist, Forecast and Analysis.
Montgomery County Economic Development Partnership. Sue Stidham, Executive Director; Jan Bailey, private citizen.
Oxford CVB. Mary-Kathryn Millner, Tourism Manager.
Panola Partnership. Colleen Clark, Office Manager/Main Street Manager.
Philadelphia/Neshoba County Community Development Partnership. Cindy Brown, Tourism Director.
Pickwick Pines Resort. Ken Hardwick, Chief Financial Officer.
Rankin First. Larry Mobley, Assistant Director.
Richland, City of. Ann Grantham, Public Works/Community Development.
Tippah County Development Foundation. Duane Bullard, ED Director.
Tishomingo County Development Foundation. Gary Matthews, ED Director.
Tunica Main Street. Caroline Myers, Executive Director.
Tupelo CVB. Pat Rasberry, Assistant Director.
Union County Development Association. Amanda Kent, Tourism/Community Development Specialist.
U.S. Army Corps of Engineers, Vicksburg District, Grenada Project Management Office. Shelby Staten.
Vicksburg CVB. Clara Ross-Stamps, Executive Director.
Vicksburg, City of. Christi Kilroy, Special Projects Coordinator.
Woodville Main Street. Mabel Clark, Director.

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

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

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

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

APPENDICES

Appendix A
ESTIMATED TOURISM EMPLOYMENT
FY 2004 AND FY 2005

CATEGORY	FY 2004	FY 2005	CHANGE
FOOD SERVICES & DRINKING PLACES (1)	29,482	28,975	-1.7%
LODGING (2)	16,640	16,400	-1.4
GAMING (3)	29,500	28,736	-2.6
RETAIL TRADE (4)	8,700	9,670	11.1
SUPPORT ACTIVITIES, AIR TRANSPORTATION (5)	1,697	1,471	-13.3
TRAVEL ARRANGEMENT/RESERVATIONS	498	455	-8.6
PASSENGER CAR RENTAL	167	169	1.2
AIR PASSENGER, SCHEDULED & CHARTERED (5)	283	258	-8.8
SCENIC & SIGHTSEEING TRANSPORTATION	65	75	15.4
CHARTER BUS INDUSTRY	104	104	None
TAXI SERVICE	36	38	5.6
SUBTOTAL, TRANSPORTATION	2,850	2,570	-9.8
MOTION PICTURE THEATERS	154	165	7.1
MOTION PICTURE & VIDEO PRODUCTION	83	96	15.7
MUSEUMS, HISTORICAL SIGHTS & SIMILAR (6)	216	211	-2.3
BOWLING CENTERS	73	77	5.5
PERFORMING ARTS, SPECTATOR SPORTS & RELATED (6)	214	202	-5.6
GOLF COURSES & COUNTRY CLUBS (6)	842	872	3.6
MARINAS	92	74	-19.6
AMUSEMENT PARKS & ARCADES	52	60	15.4
LAUNDRY SERVICES (7)	NA	161	NA
ADVERTISING & RELATED SERVICES (7)	NA	163	NA
STATE PARKS & FEDERAL RECREATION	660	375	-43.2
STATE, CITY, COUNTY TOURISM OFFICES (8)	240	244	1.7
SUBTOTAL, (OTHER SERVICES/RECREATION/ ENTERTAINMENT/STATE/LOCAL/FEDERAL GOVT)	2,626	2,700	2.8
NONRESIDENTIAL BUILDING CONSTRUCTION	1,364	1,407	3.2
HIGHWAY, STREET AND BRIDGE CONSTRUCTION	1,238	1,242	0.3
SUBTOTAL, CONSTRUCTION	2,602	2,649	1.8
TOTAL	92,400	91,700	-0.8%

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.
3. Based on Mississippi Gaming Commission quarterly survey and the data include state-licensed casino hotel employees.
4. Include Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores. The Specialty Food and Grocery Stores were first-time entities.
5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.
6. Includes some government jobs.
7. Estimated for the first time in FY 2005.
8. Includes the number of Full-Time Equivalent (FTE) staff at Mississippi's 12 Welcome Centers. Mississippi's 12th Welcome Center opened in FY 2005.

SOURCES: Mississippi Department of Wildlife, Fisheries Parks, 2005.
Mississippi Department of Employment Security, LMI Department, 2005.
MDA/Tourism Division, 2005.
Mississippi Gaming Commission, 2005.
Mississippi State Tax Commission, 2005.

Appendix B
ESTIMATED TOURISM PAYROLL
FY 2004 AND FY 2005

CATEGORY	FY 2004 PAYROLL	FY 2005 PAYROLL
FOOD SERVICES & DRINKING PLACES	\$294,037,420	\$288,615,060
LODGING (1)	\$119,501,224	\$117,420,276
GAMING (2)	\$899,159,804	\$889,189,852
RETAIL TRADE (3)	\$126,116,849	\$146,458,172
SUPPORT ACTIVITIES, AIR TRANSPORTATION	62,556,178	56,478,934
TRAVEL ARRANGEMENT/RESERVATIONS	9,406,571	9,645,927
PASSENGER CAR RENTAL	3,466,071	3,738,087
AIR PASSENGER, SCHEDULED & CHARTERED	8,136,446	8,352,314
SCENIC & SIGHTSEEING TRANSPORTATION	1,248,979	1,168,781
CHARTER BUS INDUSTRY	1,669,517	1,756,883
TAXI SERVICE	884,161	902,548
SUBTOTAL, TRANSPORTATION	\$87,367,923	\$82,043,474
MOTION PICTURE THEATERS	1,244,784	1,283,389
MOTION PICTURE & VIDEO PRODUCTION	2,022,481	2,261,868
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	4,921,308	5,106,006
BOWLING CENTERS	788,026	820,886
PERFORMING ARTS, SPECTATOR SPORTS & RELATED	4,238,681	4,411,046
GOLF COURSES	12,889,714	13,770,970
STATE PARKS & FEDERAL RECREATION	23,977,959	15,143,908
STATE, CITY, COUNTY TOURISM OFFICES (4)	8,038,869	8,150,000
MARINAS	1,714,592	1,372,400
AMUSEMENT PARKS & ARCADES	455,284	559,498
LAUNDRY SERVICES	NA	2,631,075
ADVERTISING & RELATED SERVICES	NA	5,346,618
SUBTOTAL, (OTHER SERVICES/RECREATION/ ENTERTAINMENT/STATE/LOCAL/FEDERAL GOVT)	\$60,291,698	\$60,857,664
NONRESIDENTIAL BUILDING CONSTRUCTION	46,038,636	47,939,884
HIGHWAY, STREET AND BRIDGE CONSTRUCTION	38,554,500	38,050,853
SUBTOTAL, CONSTRUCTION	\$84,593,136	\$85,990,737
TOTAL	\$1,671,068,054	\$1,670,575,235

Appendix B (continued)

1. Does not include the payroll of employees at state-licensed casino hotels or the Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state – licensed casinos plus the employees at state-licensed casino hotels. Data do not reflect the estimated payroll of casino and hotel employees at the Pearl River Resort.
3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores.
4. Includes the payroll of staff at Mississippi’s 12 Highway Welcome Centers.

SOURCES: Mississippi Department of Wildlife, Fisheries & Parks, 2005.
Mississippi Department of Employment Security, LMI Department, 2005.
MDA/Tourism Division, 2005.
Mississippi Gaming Commission, 2005.

Appendix C
ESTIMATED TOURISM
EXPENDITURES, FY 2004 AND FY 2005

CATEGORY	FY 2004	FY 2005	CHANGE
RESTAURANTS	\$939,013,335	\$923,154,035	-1.7%
QUICK-STOP GROCERIES, SPECIALTY FOOD RELATED & GROCERY STORES	349,951,862	413,089,284	18.0
CONCESSIONS QUICK FOOD	131,531,714	136,106,872	3.5
BAR & BEER PARLORS	62,693,665	62,606,246	-0.1
LODGING	500,536,945	518,098,263	3.5
GAMING (1)	2,167,382,493	2,178,938,471	0.5
DEPARTMENT STORES	716,777,707	748,295,653	4.4
APPAREL & ACCESSORIES	123,445,498	125,307,680	1.5
GENERAL MERCHANDISE (NEC)	35,745,132	39,676,681	11.0
MISCELLANEOUS RETAIL (NEC)	88,146,205	80,216,624	-9.0
GIFT, NOVELTY & SOUVENIR	75,269,271	76,105,875	1.1
SPORTING GOODS & BICYCLE	28,371,028	30,368,324	7.0
CAMERA & PHOTOGRAPHIC STORES	12,342,844	12,475,657	1.1
ANTIQUE & SECONDHAND STORES	21,057,545	21,529,968	2.2
CIGAR STORES & STANDS	13,255,854	13,832,838	4.4
GAMING RELATED GIFT/NOVELTY (2)	87,629,264	88,465,589	1.0
GASOLINE AT 18 CENTS (3)	534,838,535	636,336,009	19.0
GASOLINE SERVICE STATIONS	42,824,789	40,795,184	-4.7
DIESEL FUEL AT 18 CENTS (3)	52,223,888	75,141,242	43.9
FIXED FACILITIES, AIR TRANSPORTATION (4)	1,687,881	619,517	-63.3
RENTAL & LEASING, TRANSPORTATION	30,829,141	31,280,262	1.5
AUTO REPAIR SHOPS	14,485,816	14,436,783	-0.3
WATER PASSENGER TRANSPORTATION	NA	632,688	NA
MARINA SERVICES	5,535,199	6,195,526	11.9
PUBLIC GOLF COURSES	10,066,176	14,916,465	48.2
MOTION PICTURE SHOWS	9,501,797	8,887,960	-6.5
DANCE HALLS, NIGHT CLUBS	254,702	184,250	-27.7

Appendix C (continued)

CATEGORY	FY 2004	FY 2005	CHANGE
PARKS	\$12,574,510	\$12,386,421	-1.5
BOWLING, BILLIARDS & POOL	2,718,779	2,578,896	-5.1
COLLEGE ATHLETICS	9,866,251	8,895,782	-9.8
SKATING RINKS	887,793	1,005,177	13.2
RACE TRACKS	333,037	231,993	-30.3
AQUARIUMS, BOTANICAL GARDENS	818,297	921,581	12.6
MUSEUMS	1,660,198	1,403,839	-15.4
LICENSING FEES—NONRESIDENT HUNTING & FISHING (5)	7,372,405	7,933,731	7.6
STATE PARKS	3,226,251	3,942,409	22.2
FEDERAL PARKS & LAKES	595,939	748,909	25.7
NATIONAL HISTORICAL AREAS	1,544,454	1,117,690	-27.6
ADVERTISING SPECIALTIES	2,311,599	2,238,371	-3.2
PRINTING & PUBLISHING	3,195,876	3,193,916	-0.1
LAUNDRIES, DRY CLEANING	8,452,172	8,467,552	0.2
TOTAL	\$6,110,955,847	\$6,352,760,213	4.0%

This Appendix Includes:

1. Net Tourist/Visitor Gross Gaming Revenues for 29 state-licensed casinos.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages.
4. Air Transportation, Air Terminal and Transportation Services.
5. Only the nonresident fishing and hunting licensing portion were computed.

SOURCES: American Automobile Association Web Site, 2005.
MDA/Energy Division, 2005.
MDA/Tourism Division, 2005.
Mississippi Department of Wildlife, Fisheries & Parks, 2005.
Mississippi Gaming Commission, 2005.
Mississippi State Tax Commission, 2005.
U.S. Army Corps of Engineers, Vicksburg Headquarters and
the Columbus, Mississippi Office, 2005.
U.S. Department of the Interior, National Park Service:
Natchez National Historical Park, Vicksburg National Military Park, 2005.

Appendix D
ESTIMATED TOURISM GENERAL FUND
REVENUES, FY 2004 AND FY 2005

CATEGORY	FY 2004	FY 2005	CHANGE
RESTAURANTS	\$39,129,424	\$38,750,150	-1.0%
QUICK-STOP GROCERIES, SPECIALTY FOOD RELATED & GROCERY STORES	14,571,947	17,345,758	19.0
CONCESSIONS QUICK FOOD	5,484,287	5,716,142	4.2
BAR & BEER PARLORS	2,614,314	2,629,175	0.6
LODGING	20,872,472	21,760,148	4.3
GAMING (1)	130,512,151	131,461,309	0.7
DEPARTMENT STORES	29,889,902	31,428,839	5.1
APPAREL & ACCESSORIES	5,146,461	5,262,436	2.3
GENERAL MERCHANDISE (NEC)	1,482,974	1,658,528	11.8
MISCELLANEOUS RETAIL (NEC)	3,511,409	3,182,819	-9.4
GIFT, NOVELTY & SOUVENIR	3,136,921	3,194,739	1.8
SPORTING GOODS & BICYCLE	1,182,665	1,274,424	7.8
CAMERA & PHOTOGRAPHIC STORES	511,317	517,041	1.1
CIGAR STORES & STANDS	552,776	580,980	5.1
ANTIQUE & SECONDHAND STORES	876,673	902,890	3.0
GAMING RELATED GIFT/NOVELTY (2)	3,654,182	3,715,555	1.7
GASOLINE SERVICE STATIONS	1,810,865	1,709,428	-5.6
RENTAL & LEASING, TRANSPORTATION	899,762	900,587	0.1
AUTO REPAIR SHOPS	593,935	599,816	1.0
WATER PASSENGER TRANSPORTATION	NA	44,288	NA
MARINA SERVICES	230,820	260,093	12.7
PUBLIC GOLF COURSES	419,872	597,885	42.4
MOTION PICTURE SHOWS	396,230	373,295	-5.8
DANCE HALLS, NIGHT CLUBS	7,594	6,183	-18.6
PARKS	522,285	517,249	-1.0

Appendix D (continued)

CATEGORY	FY 2004	FY 2005	CHANGE
BOWLING, BILLIARDS & POOL	\$113,375	\$108,314	-4.5%
COLLEGE ATHLETICS	411,428	373,169	-9.3
SKATING RINKS	37,021	42,217	14.0
RACE TRACKS	13,222	9,518	-28.0
AQUARIUMS, BOTANICAL GARDENS	34,306	38,833	13.2
MUSEUMS	38,890	34,328	-11.7
ADVERTISING SPECIALTIES	89,725	92,791	3.4
PRINTING & PUBLISHING	132,622	134,006	1.0
LAUNDRIES, DRY CLEANING	351,851	354,951	0.9
CONSTRUCTION ACTIVITY TAX (3)	11,025,000	14,372,762	30.4
PERSONAL INCOME/SALES TAX (4)	85,870,761	86,008,194	0.2
TOTAL	\$366,129,439	\$375,958,840	2.7%

This Appendix Includes:

1. Approximately \$131.5 million, or about $\frac{3}{4}$ of the Net Tourist/Visitor State Gaming Tax Revenues, went to the General Fund in FY 2005. The other $\frac{1}{4}$ of these State Gaming Tax Revenues were diverted.
2. Estimated Tourism-related sales at the various retail shops.
3. The estimated Tourism-related portion of the General Fund based on Tourism-related construction activity, e.g., new construction, expansions/renovations.
4. The estimated Tourism-related portion of the General Fund amount, based on estimated effective tax rates for Personal Income, Sales Tax and all other Taxes.

SOURCES: Center for Policy Research and Planning, Mississippi IHL, 2005.
 MDA/Energy Division, 2005.
 MDA/Tourism Division, 2005.
 Mississippi State Tax Commission, 2005.

Appendix E

ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2004

COUNTY	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Adams	\$93,884,206	2,360	12,860	18.4	\$6,847,612
Alcorn	40,098,811	715	13,280	5.3	903,103
Amite	1,707,844	23	1,860	1.2	NA
Attala	16,562,757	300	6,500	4.4	37,577
Benton	691,729	11	1,220	0.9	8,600
Bolivar	22,486,795	425	13,260	3.3	2,183,954
Calhoun	2,430,048	27	3,840	0.7	60,500
Carroll	1,106,965	14	1,250	1.1	NA
Chickasaw	6,965,838	85	6,630	1.3	9,990
Choctaw	1,042,503	14	2,050	0.7	NA
Claiborne	2,221,620	34	3,660	0.9	430,007
Clarke	3,555,991	55	2,930	1.9	1,600
Clay	13,342,567	218	7,810	2.7	27,129
Coahoma	111,041,895	1,370	10,250	13.1	7,349,430
Copiah	7,059,799	116	8,160	1.5	NA
Covington	3,606,890	68	5,350	1.3	500,000
De Soto@	172,762,905	3,085	39,890	8.2	7,670,941
Forrest+	144,130,267	2,680	40,430	6.8	12,626,752
Franklin	714,075	11	1,700	0.6	NA
George	5,489,310	90	4,540	2.1	120,385
Greene	1,411,740	15	2,080	0.7	18,000
Grenada@	36,409,842	640	11,600	5.7	3,437,677
Hancock	133,653,264	2,105	13,830	15.3	7,340,454
Harrison	1,654,343,115	26,695	96,790	28.7	192,943,701
Hinds	388,361,501	6,750	144,530	4.7	18,658,514
Holmes	4,341,252	60	4,050	1.5	18,750
Humphreys	2,055,112	25	3,480	0.7	NA
Issaquena	211,766	3	290	1.1	NA
Itawamba	8,608,328	136	5,580	2.5	60,000
Jackson	147,960,364	2,460	50,050	5.0	2,183,788
Jasper	2,969,984	41	4,100	1.0	4,135
Jefferson	1,033,938	11	1,210	0.9	NA

Appendix E (continued)

COUNTY FY 2004	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Jefferson Davis	\$2,138,719	32	2,340	1.4	\$105,000
Jones	44,690,740	762	27,570	2.8	1,291,952
Kemper	1,592,770	21	1,830	1.1	NA
Lafayette	55,965,132	1,006	17,080	5.9	1,026,718
Lamar+	48,382,842	785	13,320	5.8	+
Lauderdale	115,803,865	1,835	38,090	4.9	2,350,701
Lawrence	2,296,259	31	3,200	1.0	7,788
Leake	9,798,355	115	6,350	1.8	120,000
Lee	229,705,613	3,645	52,050	7.0	9,030,675
Leflore	30,952,367	580	16,570	3.5	1,639,871
Lincoln	17,886,858	265	11,980	2.2	229,050
Lowndes	99,763,819	1,520	25,430	6.0	1,275,256
Madison	130,528,016	1,870	35,480	5.3	17,596,915
Marion	9,032,147	125	8,280	1.5	3,200
Marshall	8,802,554	140	6,940	2.0	500,786
Monroe	18,021,375	265	11,640	2.3	534,400
Montgomery	7,293,719	85	2,990	2.8	3,144
Neshoba#	39,372,617#	690#	15,060	NA	4,477,922
Newton	4,789,204	68	6,840	1.0	NA
Noxubee	3,740,631	45	3,630	1.3	NA
Oktibbeha	54,734,153	990	20,800	4.7	1,348,278
Panola	17,066,820	287	10,580	2.7	196,500
Pearl River	25,547,430	360	10,450	3.6	1,526,227
Perry	1,662,276	25	2,570	1.0	14,601
Pike	37,772,363	560	16,020	3.6	51,132
Pontotoc	6,516,846	85	10,860	0.8	156,059
Prentiss	5,063,599	76	9,400	0.8	67,958
Quitman	2,305,209	23	1,880	1.2	Zero
Rankin	106,728,313	2,920	53,240	5.6	13,666,591
Scott	14,647,887	206	11,140	1.8	261,761
Sharkey	1,152,147	13	1,510	0.9	NA
Simpson	9,916,839	150	7,520	2.0	NA

Appendix E (continued)

COUNTY FY 2004	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Smith	\$1,374,306	15	3,930	0.4	\$5,444
Stone	8,555,911	105	3,810	2.8	500,149
Sunflower	9,538,885	156	10,760	1.4	223,300
Tallahatchie	1,983,803	26	2,880	0.9	5,000
Tate	9,171,504	172	6,550	2.7	385,143
Tippah	5,504,059	76	7,030	1.1	376,403
Tishomingo	7,020,728	150	5,800	2.5	2,844,973
Tunica	1,123,362,490	14,765	16,180	87.6	79,214,256
Union	9,392,909	180	8,870	2.0	18,094
Walthall	2,362,834	40	2,910	1.4	39,000
Warren	218,889,284	4,524	24,130	18.5	19,251,563
Washington	92,229,350	1,417	22,310	6.4	9,031,546
Wayne	8,100,852	105	5,220	1.9	44,916
Webster	1,768,483	22	1,980	1.1	16,129
Wilkinson	2,009,013	26	2,250	1.2	1,007,575
Winston	13,437,369	213	5,260	4.0	1,848,789
Yalobusha	1,840,197	31	3,520	0.9	44,723
Yazoo	11,005,767	155	6,690	2.3	NA
Total	\$5,723,482,249	92,400	1,127,780*	8.3	\$435,782,087

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

Estimated Tourism Capital Investment (TCI) is based on data from sources responding to the survey. NA indicates not available or none. + Lamar County TCI is included with Forrest County as Hattiesburg area. @ Tourism Capital Investment estimates for these counties were revised downward, based on FY 2005 data.

*Total Establishment Based Employment reflects data at the county level, per the Mississippi Department of Employment Security's January 2005 Annual Averages, 2001 – Forward. This nonfarm employment total—based on monthly averages—is **not** Residence Based. The Statewide/County Establishment Based Employment figures reflect nonfarm monthly averages with the Statewide data comprising July 2003 – June 2004 monthly averages.

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

Appendix F

ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2005

COUNTY	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Adams	\$95,226,134	2,230	12,130	18.4	\$1,182,350
Alcorn	43,297,968	724	13,700	5.3	2,067,188
Amite	1,816,820	22	1,660	1.3	NA
Attala	16,081,118	300	5,650	5.3	NA
Benton	751,238	11	1,225	0.9	NA
Bolivar	24,807,878	465	12,220	3.8	1,657,961
Calhoun	2,349,078	27	3,470	0.8	NA
Carroll	925,422	13	1,015	1.3	NA
Chickasaw	6,273,750	80	6,450	1.2	66,000
Choctaw	1,263,045	14	2,050	0.7	NA
Claiborne	2,220,350	35	3,540	1.0	NA
Clarke	3,541,502	57	2,955	1.9	NA
Clay	13,610,658	218	7,575	2.9	NA
Coahoma	108,330,590	1,345	9,345	14.4	8,831,250
Copiah	7,005,664	120	8,000	1.5	240,050
Covington	4,198,123	73	5,320	1.4	NA
De Soto	187,466,035	3,190	39,390	8.1	7,761,505
Forrest +	144,512,662	2,800	37,750	7.4	27,265,600
Franklin	858,906	13	1,605	0.8	NA
George	6,056,034	95	4,600	2.1	4,800
Greene	1,459,008	15	1,770	0.8	4,800
Grenada	36,163,751	650	10,935	5.9	4,786,723
Hancock	147,471,749	2,190	14,400	15.2	26,753,917
Harrison	1,690,917,011	26,940	95,300	28.3	193,175,028
Hinds	385,744,275	6,620	143,600	4.6	30,027,244
Holmes	3,632,850	50	4,050	1.2	NA
Humphreys	2,159,896	20	3,055	0.7	NA
Issaquena	260,634	3	245	1.2	NA
Itawamba	8,885,234	135	5,400	2.5	NA
Jackson	162,671,507	2,500	50,860	4.9	1,907,189
Jasper	2,589,522	42	3,935	1.1	NA
Jefferson	1,043,469	11	1,120	1.0	NA

Appendix F (continued)

COUNTY FY 2005	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Jefferson Davis	\$2,245,695	30	2,050	1.5	NA
Jones	49,204,141	740	28,455	2.6	1,142,800
Kemper	1,283,634	20	1,845	1.1	NA
Lafayette	61,916,650	1,175	17,060	6.9	2,435,936
Lamar +	53,910,345	875	14,870	5.9	+
Lauderdale	118,006,806	1,875	37,120	5.1	937,766
Lawrence	2,280,706	30	2,645	1.1	2,697
Leake	9,288,586	105	6,170	1.7	104,406
Lee	230,501,836	3,600	53,535	6.7	9,846,153
Leflore	34,595,447	650	15,040	4.3	1,661,335
Lincoln	17,899,533	265	12,500	2.1	NA
Lowndes	99,954,180	1,480	25,355	5.8	1,586,354
Madison	138,907,395	1,895	43,820	4.3	9,966,660
Marion	9,208,927	126	8,040	1.6	29,250
Marshall	8,586,509	144	6,500	2.2	370,148
Monroe	19,445,244	265	11,300	2.3	594,700
Montgomery	6,893,999	80	2,880	2.8	279,010
Neshoba #	38,873,460	450	14,620	NA	5,284,266
Newton	5,257,893	69	6,640	1.0	23,000
Noxubee	3,882,624	45	3,280	1.4	18,422
Oktibbeha	55,383,064	950	20,575	4.6	533,555
Panola	16,736,002	264	10,730	2.5	1,022,537
Pearl River	26,343,876	350	10,080	3.5	547,120
Perry	1,589,972	25	2,470	1.0	66,715
Pike	37,879,500	575	15,645	3.7	254,938
Pontotoc	7,672,159	88	11,580	0.8	NA
Prentiss	6,172,055	76	8,805	0.9	3,992
Quitman	1,494,742	15	1,830	0.8	27,500
Rankin	119,207,156	2,935	54,700	5.4	20,402,013
Scott	15,286,520	216	11,665	1.9	182,939
Sharkey	1,222,498	13	1,200	1.1	12,000
Simpson	8,910,346	100	7,650	1.3	NA

Appendix F (continued)

COUNTY FY 2005	Tourism Expenditures	Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage	Tourism Capital Investment
Smith	\$1,429,670	15	3,450	0.4	NA
Stone	8,988,088	102	3,700	2.8	NA
Sunflower	9,761,730	160	9,970	1.6	434,097
Tallahatchie	1,940,384	26	2,745	0.9	NA
Tate	9,070,989	170	6,030	2.8	NA
Tippah	6,472,743	82	7,245	1.1	168,525
Tishomingo	7,900,003	155	5,730	2.7	2,993,459
Tunica	1,115,222,402	14,000	16,000	87.5	112,889,707
Union	10,123,445	186	8,470	2.2	121,893
Walthall	2,147,677	40	3,100	1.3	NA
Warren	221,944,503	4,300	25,275	17.0	24,140,457
Washington	86,014,552	1,400	21,380	6.5	6,232,227
Wayne	8,340,436	100	5,575	1.8	4,800
Webster	2,145,264	22	2,040	1.1	7,968
Wilkinson	1,951,804	25	1,930	1.3	378,968
Winston	13,192,456	212	5,020	4.2	1,702,992
Yalobusha	2,326,891	31	2,935	1.1	236,508
Yazoo	9,063,924	140	6,025	2.3	116,305
Total	\$5,841,670,342	91,700	1,121,595*	8.2	\$513,312,935

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

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

Estimated Tourism Capital Investment (TCI) is based on data from sources responding to the survey.

NA indicates not available or none. + Lamar County TCI is included with Forrest County as Hattiesburg area.

*Total Establishment Based Employment reflects nonfarm data at the state and county levels, per the Mississippi Department of Employment Security's State & Metro Trends monthly reports with FY 2005 data; the September 2005 Annual Averages, 2001 – Forward; and their Annual Labor Force Reports. This nonfarm employment total—based on monthly averages—is **not** Residence Based. The Statewide/County Establishment Based Employment figures reflect nonfarm monthly averages comprising July 2004 – June 2005, but these totals are subject to revisions. The estimated county-by-county nonfarm totals will not add up to the statewide nonfarm total in Table 12.

SOURCES: Mississippi State Tax and Mississippi Gaming Commissions; Mississippi Department of Employment Security, LMI; Jefferies & Company, Inc., New York, New York; MDOT; DFA, Bureau of Buildings and Grounds and Real Property Management; DWFP; McGraw Hill Construction; and many other Economic Development/Tourism Offices, Chambers of Commerce, Cities/Counties mentioned in the Acknowledgments, 2005.

Appendix G
ESTIMATED NUMBER OF HOTEL/MOTEL ROOMS BY COUNTY, FY 2004 AND FY 2005

COUNTY	HOTEL/MOTEL ROOMS (6-30-04)	HOTEL/MOTEL ROOMS (6-30-05)	PERCENTAGE CHANGE
Adams	919	919	None
Alcorn	471	459	-2.5
Amite	15	15	None
Attala	131	131	None
Benton	0	0	NA
Bolivar	440	476	8.2
Calhoun	44	44	None
Carroll	0	0	NA
Chickasaw	62	62	None
Choctaw	0	0	NA
Claiborne	45	45	None
Clarke	25	25	None
Clay	195	195	None
Coahoma	779	779	None
Copiah	143	145	1.4
Covington	93	93	None
De Soto	1,662	1,755	5.6
Forrest	1,522	1,592	4.6
Franklin	10	10	None
George	84	84	None
Greene	9	0	NA
Grenada	642	642	None
Hancock	1,071	1,065	-0.6
Harrison	12,349	12,839	4.0
Hinds	5,854	6,066	3.6
Holmes	40	40	None
Humphreys	38	38	None
Issaquena	0	0	NA
Itawamba	55	62	12.7
Jackson	2,205	2,055	-6.8
Jasper	26	26	None
Jefferson	0	0	NA

Appendix G (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-04)	HOTEL/MOTEL ROOMS (6-30-05)	PERCENTAGE CHANGE
Jefferson Davis	69	69	None
Jones	577	577	None
Kemper	35	35	None
Lafayette	678	704	3.8
Lamar	543	685	26.2
Lauderdale	1,641	1,583	-3.5
Lawrence	54	54	None
Leake	56	56	None
Lee	1,573	1,692	7.6
Leflore	651	703	8.0
Lincoln	411	396	-3.6
Lowndes	800	800	None
Madison	1,381	1,356	-1.8
Marion	117	120	2.6
Marshall	162	162	None
Monroe	201	201	None
Montgomery	116	116	None
Neshoba	1,335	1,335	None
Newton	87	200	129.9
Noxubee	64	64	None
Oktibbeha	707	707	None
Panola	403	429	6.5
Pearl River	286	286	None
Perry	0	0	NA
Pike	573	553	-3.5
Pontotoc	56	56	None
Prentiss	100	100	None
Quitman	0	0	NA
Rankin	1,440	1,397	-3.0
Scott	193	282	46.1
Sharkey	32	32	None
Simpson	129	94	-27.1
Smith	0	0	NA

Appendix G (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-04)	HOTEL/MOTEL ROOMS (6-30-05)	PERCENTAGE CHANGE
Stone	93	93	None
Sunflower	214	211	-1.4
Tallahatchie	0	0	NA
Tate	131	131	None
Tippah	82	82	None
Tishomingo	163	163	None
Tunica	6,365	6,323	-0.7
Union	248	248	None
Walthall	30	30	None
Warren	1,757	1,759	0.1
Washington	1,107	1,171	5.8
Wayne	159	159	None
Webster	0	0	NA
Wilkinson	0	0	NA
Winston	213	215	0.9
Yalobusha	30	30	None
Yazoo	138	138	None
Total	54,110	55,259	2.1

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2005 and January 2006, 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 2005 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.

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Hendersonville, Tennessee, 2005.

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, 2005.

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