

Fiscal Year 2007 Economic Impact
For
Tourism In Mississippi
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Prepared By:

Mississippi Development Authority/Tourism Division
Research Unit
Post Office Box 849
Jackson, Mississippi 39205-0849

Telephone: (601) 359-3297
Fax: (601) 359-5757

VisitMississippi.org

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INTRODUCTION

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

Tourism's visibility throughout Mississippi is at an all-time high. Fifty-three local entities with a Room and/or Restaurant Tax were in place as of February 2008. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism is a \$700 billion national industry in terms of direct domestic and international expenditures with 7.5 million direct jobs, \$178.1 billion in payroll income, and \$109.9 billion in combined federal, state and local tax revenues, per the Travel Industry Association, CY 2006 data. It's a key part of Mississippi's economic development engine.

This report's purpose is to estimate Tourism's economic impact at the state and county level for FY2007. Tourism is vital to Mississippi's economy, based on these estimates:

- Tourism accounted for 85,300 direct jobs in FY2007, based on quarterly employment figures, a 13.4% increase versus FY2006. Approximately 83,600 of these FY2007 jobs, or 98.0%, were private sector ones. The 85,300 direct jobs were 7.4% of the total statewide establishment-based employment in FY2007.
- Tourism accounted for 37,295 indirect/induced jobs in FY2007. Thus, the total FY2007 Tourism employment (direct plus indirect plus induced) was 122,595.
- FY2007 Tourism annual payroll for the 85,300 direct jobs was \$1.7 billion, a 22.8% increase from the \$1.4 billion annual payroll in FY2006. The indirect/induced labor income was about \$714.3 million. Thus, the total labor income (direct payroll plus indirect/induced labor income) was about \$2.4 billion or +19.3% versus FY2006 levels.
- The Tourism Industry ranked 6th in total estimated FY2007 direct employment, based on all sectors of Mississippi's economy.
- FY2007 Tourism expenditures of \$5.7 billion, a 10.1% increase from FY2006.
- Tourism's proportion of Mississippi's FY2007 General Fund—\$380.4 million of the \$4.7 billion General Fund—was 8.1%, or \$1 of every \$12. The \$380.4 million was a 17.2% increase over the \$324.7 million in FY2006 Tourism General Fund revenues.
- Tourism's estimated portion of the Gross State Product (GSP) was \$3.2 billion, or 4.0% in FY2006 (1/25 of the state's economy), and \$4.2 billion, or 5.0% in FY2007 (1/20).
- Estimated FY2007 Tourism Capital Investment (TCI)—new/renovated contract construction costs—were \$895.6 million, a 62.5% increase over FY2006. About \$343 million, or 38.3% of this TCI total, were attributed to state-licensed casinos + amenities.
- FY2007 City/County Tourism tax revenues (Room/Restaurant, 18.5% of the 7% state sales tax returned to cities attributed to Tourism, Seawall Tax, state-licensed casinos) were \$143 million, a 10.0% increase from FY2006.
- Estimated FY2007 Tourism state taxes collected were \$417.1 million, a 10.5% increase versus FY2006. State-licensed casino taxes accounted for 38.0% of the state taxes collected and a portion are diverted to MDOT. Gasoline taxes are included in Tourism state taxes collected, but not in the Tourism General Fund revenues—they are diverted.
- The FY2007 portion of state sales tax (18.5% of the 7%) returned to cities attributed to Tourism was \$37.7 million, a 4.8% increase compared to FY2006 levels. These taxes do not include state-licensed Casino Gaming nor Gasoline taxes.
- Estimated Return on Investment (ROI) for the State's Domestic Consumer Ad Placement and Production Costs were \$10.40 in FY2006 and \$7.80 in FY2007, a 25.0% decrease.
- The number of statewide hotel/motel rooms increased from 45,774 on June 30, 2006, to 51,087 on June 30, 2007, or 11.6%. Statewide hotels/motels increased from 585 as of June 30, 2006, to 609 as of June 30, 2007, or 4.1%.
- Mississippi's estimated 22 million total visitors in FY2007, a 5.8% increase over FY2006, included 21.8 million domestic visitors (person-trips)—sum of overnight leisure + leisure day-trip + overnight/day business travelers + combined business/leisure travelers + pass-throughs + group tour visitors—plus an estimated 190,000 international visitors.
- An estimated 10.6 million domestic overnight leisure visitors in FY2007 were up 7.5% versus the 9.9 million domestic overnight leisure visitors in FY2006. These exclude group tour, business travelers, and international visitors who overnight.

- About 72% of the FY2007 domestic overnight leisure visitors to Mississippi in FY2007, were from out-of-state, or “Tourism Exports”. This excludes day leisure, group tour, business travelers and international visitors.
- An estimated 81% of all FY2007 travel party expenditures were from out-of-state.
- Mississippi’s net balance of Tourism trade—Tourism Exports (expenditures from out-of-state visitors in Mississippi) minus Tourism Imports (expenditures out of Mississippi)—was about \$1 billion, or similar to the FY2006 level of \$1 billion.
- Welcome Center registrants for FY2007 totaled 2,206,418, a 10.0% increase versus the 2,005,849 recorded in FY2006.
- The estimated FY2007 Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Tourism tax revenues and ROI figures cited on page 5 include leisure dollars from in-state and out-of-state Mississippi tourists/visitors. They reflect some expenditures by out-of-state volunteers and work crews, and by pass-through travelers.

METHODS

The purpose of this report was to estimate Tourism’s FY2007 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 Airport passenger data, are covered. Certain agencies, such as federal entities, have an October to September FY and some data reflect 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, pharmacies and drug stores, book stores, tape/cd/record 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 DWF&P provided hunting/fishing licensing fees and state park jobs/revenues. Officials with the Natchez National Historical Park, the Vicksburg National Military Park, Brice’s Crossroads National Battlefield Site and Shiloh 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 FY2007 park revenue/employment data.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the Mississippi Department of Employment Security (MDES), Labor Market Information (LMI) Department, via monthly NAICS code averages, July 2006–June 2007. FY2007 Gaming jobs/payroll data were secured from Mississippi Gaming Commission (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.

Tourism’s Broader View and Economic Development are on pages 18–20. These state level indicators focus on Gross State Product, Total Value Added, Total Value Added to Expenditures, State-level Tourism Accounts, Employment and Labor Income Multipliers, Tourism Exports and Imports, Estimated Effective Tax Rates, and Employment Rankings.

FINDINGS

Gaming (state-licensed), Restaurant and Lodging jobs were the top three in terms of direct Tourism Employment, in Mississippi, based on Appendix A. The 26,526 state-licensed casino gaming jobs, excluding casino hotels, represented 31.2% of direct Tourism Employment. When state-licensed casino hotel employment totals (3,574) are added to the casinos, their combined direct employment total is 30,100, or 35.3% of direct Tourism jobs. All other direct Tourism jobs totaled 55,200, or 64.7% of direct FY2007 Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY2006/2007. The narrative section on page 18 summarizes data on indirect/induced jobs. Appendix B shows FY2006/2007 payroll-related information by employment component. The indirect/induced labor income multipliers are presented on page 19.

Estimated Tourism expenditures were \$5.2 billion in FY2006 and \$5.7 billion in FY2007, per Appendix C. FY2006/2007 estimated General Fund revenues are in Appendix D. These estimates totaled \$324.7 million in FY2006 and \$380.4 million in FY2007. Tourism's \$380.4 million portion of the FY2007 General Fund was 8.1%. It includes the estimated Tourism-related construction activity amount, Personal Income, Sales Tax and all other taxes.

Appendices E and F, respectively, have estimated FY2006/2007 county level Tourism Expenditures, direct Tourism Employment, the Tourism employment percentage, State Sales Taxes returned to Cities attributed to Tourism, and Tourism Capital Investment data.

Appendix G presents the FY2006/2007 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 studies are highlighted. These include snapshots for FY2006 and FY2007.

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 FY2007, with 2,206,418 registrants out of 2,782,698 persons serviced. Most Welcome Center registrants are U.S. residents. International travelers, in FY2007, comprised 42,599, or 1.9% of the 2,206,418 registrants. This proportion was 2.1% in FY2006 based on 41,660 international registrants.

U.S. registrants increased by 10.2% between FY2006 and FY2007; the international component increased by 2.3%; and total registrants increased by 10.0%, per Table 1. Louisiana, Mississippi, Alabama, Texas, Florida and Georgia held the top six spots in FY2006/2007, per Tables 2/3. Canada had the most international registrants—35.2% market share in FY2006 and 38.3% market share in FY2007, per Tables 4/5.

Welcome Center Reservation Service

The Welcome Center Reservation Service enables travel counselors to make reservations for tourists/visitors in any hotel/motel, bed and breakfast, or campground that accepts those reservations. This Reservation Service completed its 14th year of operation in June 2007 with \$420,312 in revenue, 5,022 reservations and 6,067 room nights booked.

Regional Airport/Air Passenger Data

Mississippi's Regional/International Airports reported 1,216,531 enplanements in FY2007, a 0.1% increase over FY2006. The two International/five Regional Airports, plus Tunica County's Airport/others with non-scheduled service had capital expenditures and improvements.

The Jackson-Evers International Airport enplaned 714,946 passengers, or 58.8% of all passengers enplaned in Mississippi. It had 42 daily nonstop flights to 11 cities/13 airports, including Atlanta, Baltimore, Charlotte, Chicago, Cincinnati, Dallas, Detroit, Houston, Memphis, Orlando, and Washington, D.C. Service to Newark, via Continental, began in September 2007. Jackson-Evers reported some \$7.5 million in capital improvement projects during FY2007. This airport is a vital cog for the state's air traffic activity.

Gulfport-Biloxi's International Airport reported 411,971 enplanements in FY2007 (July 2006-June 2007), a 16.9% increase versus 352,411 enplanements in FY2006. Six carriers—Air Tran, ASA/Delta, Allegiant, American, Continental and Northwest—serve it. Cities served were

Atlanta, Dallas-Ft. Worth, Ft. Lauderdale, Houston, Las Vegas, Memphis, Orlando and Tampa. They cited \$54.6 million in estimated FY2007 capital expenditures and improvements.

FY2007 charter flights included: Gulfport-Biloxi—70 charter flights/3,931 passengers, with cities of origin such as Atlanta, Charlotte, Chicago, Orlando and Philadelphia; Hattiesburg-Laurel—37 charter flights/2,465 passengers; Tupelo—10 charter flights/800 passengers; and Mid-Delta—5 charter flights/543 passengers.

The Tunica County Airport had 2,361 scheduled enplanements and 35,552 charter enplanements in FY2007. Their 434 charter flights in FY2007 comprised airports throughout the U.S.—Atlanta; Baton Rouge; Dallas; Greensboro, North Carolina; Kansas City, Missouri; Chicago; among others. Some \$7.0 million in estimated net capital expenditures and improvements were made to the Tunica County Airport in FY2007.

Ad Effectiveness Studies, FY2006/FY2007 (Source: TNS, July 2007)

These studies survey households within and 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 FY2007 ROI was \$8, based on the Tourism General Fund revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's domestic consumer ad placement costs. For FY2006, the corresponding ROI was \$10. Domestic consumer advertising, in FY2007, contributed an estimated \$14.4 million, or 3.8%, to Tourism's \$380.4 million portion of Mississippi's General Fund. This is just as significant as the estimated ROI.

Other tools measured include intent to visit a destination, image ratings and commitment. FY2007 ads (all sources) captured the attention of half (50%) of in-state resident respondents as well as 26% (250-mile market), 13% (500-mile market) and 9% (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 three 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 (59% recall versus 20% do not recall).

Visitor Profile Study, FY2007 (Sources: MGC, STR, TNS, and others October 2007)

Some 22 million estimated total visitors (person-trips)—all domestic leisure plus all business plus all group travel plus international visitors—overnight in, or did a day trip to Mississippi in FY2007. This includes roughly 21.8 million domestic plus an estimated 190,000 international visitors. An estimated 910,000 group travelers, including some international visitors, were 4% of all visitors. Sources used to compute the estimated visitation figure include the Mississippi Gaming Commission (MGC) quarterly surveys, reflecting patrons by state of origin and occupancy rates for state-licensed casino hotels; monthly Smith Travel Research (STR) surveys; Mississippi Highway Welcome Center registration data; among other sources.

TNS, in the FY2007 Domestic Visitor Profile/consumer survey, reported that about 76% (³/₄) were leisure travelers, or tourists; 15% were business only; and 9% both business/leisure. Domestic overnight leisure person-trips totaled about 10.6 million, a 7.5% increase over the nearly 9.9 million in FY2006, based on various sources. About 72% of the overnight leisure person-trips were from out-of-state, similar to the 73% in FY2006. Moreover, 82% of all FY2007 overnight leisure visitors came from 10 states—Mississippi, Alabama, Louisiana, Texas, Florida, Tennessee, Georgia, Arkansas, Missouri and Illinois. The top five origin Designated Market Areas (DMAs) were Jackson (Mississippi), Columbus-Tupelo-West Point, Memphis, New Orleans, and Mobile-Pensacola.

Median annual household income for all Mississippi visitors was \$59,800 (half were above and half were below this level), up from \$52,800 in FY2006, per TNS. Their average age was 47, identical to FY2006. Average travel party size was 2.9 persons. About 39% (2/5) traveled in pairs. Another 27% traveled with children. The average number of children—for those traveling with children—was 2.2. Only 7% of all visitors arrived by air. Some 58% of all visitors stayed in paid accommodations. On average, they spent 2.6 nights in Mississippi. Vacation activity niche characteristics varied by interest, but sample sizes were too low to draw valid conclusions. It's complex to compare/contrast consumer survey data from year to year.

TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY2006 AND FY2007

Origin	FY2006 Registrants	FY2007 Registrants	Percentage Change
States	1,964,189	2,163,819	10.2%
Countries	41,660	42,599	2.3%
Total	2,005,849	2,206,418	10.0%

NOTE: Tables 1-5 only reflect those visitors who completed the registration forms.
SOURCE: MDA/Tourism Division, 2007.

TABLE 2
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY2006

State	Registrants	Percentage of States	Percentage of Top Ten
Louisiana	355,256	18.1%	22.3%
Mississippi	338,654	17.2%	21.3%
Alabama	222,543	11.3%	14.0%
Texas	170,958	8.7%	10.7%
Florida	133,818	6.8%	8.4%
Georgia	125,214	6.4%	7.9%
Tennessee	95,080	4.8%	6.0%
Arkansas	61,436	3.1%	3.9%
Illinois	45,097	2.3%	2.8%
Missouri	43,934	2.2%	2.7%
Other	372,199	19.0%	NA
Total	1,964,189	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2006.

TABLE 3
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY2007

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

SOURCE: MDA/Tourism Division, 2007.

TABLE 4
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY2006

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	14,660	35.2%	42.1%
Germany	5,514	13.2%	15.8%
England	4,610	11.1%	13.2%
Mexico	2,648	6.4%	7.6%
France	2,516	6.0%	7.2%
Holland	1,844	4.4%	5.3%
Australia	1,553	3.7%	4.5%
Switzerland	607	1.5%	1.7%
Belgium	473	1.1%	1.4%
Sweden	416	1.0%	1.2%
Other	6,819	16.4%	NA
Total	41,660	100.0%	100.0%

SOURCE: MDA/Tourism Division, 2006.

TABLE 5
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY2007

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

SOURCE: MDA/Tourism Division, 2007.

GAMING

Mississippi had 28 state-licensed casinos as of June 30, 2007 versus 22 state-licensed casinos at the start of FY2006, or +27.3%. There were 29 state-licensed casinos as of 2/1/2008.

Gaming Revenues

Total state-licensed casino gross gaming revenues were \$2.8 billion in FY2007. About \$2 billion of this total, or 71.4%, were the estimated “net” tourist/visitor revenues. This tourist/visitor portion comprised 35.0% of the \$5.7 billion statewide Tourism expenditures.

Mississippi’s total gaming-related tax revenues were \$332.3 million in FY2007, with \$221.8 million in state tax receipts and \$110.4 million earmarked for cities/counties. Tourism accounted for an estimated \$158.4 million of the \$221.8 million in state tax receipts and \$79.2 million of the \$110.4 million in city/county gaming tax revenues. About \$185.8 million, or 83.8% of the \$221.8 million in state tax receipts, went into the General Fund; the other \$36 million, or 16.2%, was diverted to MDOT. Tourism’s estimated proportion of the \$185.8 million in General Fund gaming dollars was \$132.7 million, or 71.4%. The \$132.7 million comprised 34.9% of Tourism’s \$380.4 million contribution to the state’s General Fund.

FY2006/2007 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 FY2006/2007.

Mississippi Gaming Commission (MGC) Quarterly Survey Trends

About 73.3% of all FY2007 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per MGC data. Coahoma and Tunica County casinos in the North River Region had 84.1% of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Missouri, Oklahoma, Alabama, and Georgia patrons. About 44.7% of the South River Region—Greenville, Natchez and Vicksburg—casino patrons were from out-of-state; e.g., Arkansas and Louisiana, while 72.1% of Coastal Region casino patrons were from out-of-state. Louisiana, Florida, Alabama, Georgia and Texas were the top five states for out-of-state Coastal Region casino patrons.

Twenty-eight state-licensed casinos contributed to the local/state economy through a FY2007 payroll of \$789 million, up 27.3% over FY2006. FY2007 advertising and promotional expenditures attributed to the state-licensed casinos were \$94.9 million, a 32.8% increase versus FY2006. Casino patrons stayed in casino hotels in three gaming regions, per Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY2006/2007 quarterly averages. State-licensed casino hotel rooms increased from 8,653 (FY2006) to 11,660 (FY2007), or by 34.8%.

An estimated \$343 million in Tourism Capital Investment (TCI) for casinos/amenities were attributed to the state-licensed casinos and/or new development in FY2007, or 38.3% of the statewide TCI. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. and do not include land acquisition/gaming equipment, site prep.

Gaming Employment

FY2007 quarterly casino employment figures came from the MGC via their quarterly surveys. FY2007 figures reflect 26,526 state-licensed casino employees and 3,574 persons employed at state-licensed casino hotels. These combined 30,100 jobs (casinos + casino hotels) were 35.3% of all estimated statewide direct Tourism jobs.

NonGaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$250.9 million in FY2007; food and beverage revenue accounted for \$459.7 million, based on MGC data. This is significant. FY2007 retail sales at state-licensed casinos was \$98.8 million. All dollar amounts are gross sales. A portion of lodging, food & beverage, and other amenities/services are comped.

TABLE 6
GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY2006 & FY2007

Region	FY2006 Gross Gaming Revenue	Percentage of FY2006 Total	FY2007 Gross Gaming Revenue	Percentage of FY2007 Total
Coastal	\$594,828,791	26.6%	\$1,190,556,479	42.4%
North River	1,254,661,991	56.0%	1,284,077,435	45.7%
South River	390,283,553	17.4%	335,750,253	11.9%
Total	\$2,239,774,335	100.0%	\$2,810,384,167	100.0%

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2007.

TABLE 7
GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY2006 AND FY2007

Region	FY2006 Gross Gaming Revenue	FY2007 Gross Gaming Revenue	Percentage Change
Coastal	\$594,828,791	\$1,190,556,479	100.2%
North River	1,254,661,991	1,284,077,435	2.3%
South River	390,283,553	335,750,253	-14.0%
Total	\$2,239,774,335	\$2,810,384,167	25.5%

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

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2007.

TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY2006

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate	REV PAR*
Coastal	4	1,825	89.9	\$100.26	\$90.13
North River	12	6,017	85.2	57.56	49.04
South River	6	811	73.5	62.76	46.13
Total/Average	22	8,653	85.1	\$65.56	\$55.79

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2005-2006.

TABLE 9
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY2007

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

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

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

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

INTERNATIONAL TRAVEL

This section highlights some International Travel items for FY2006/2007. MDA/Tourism Division began tracking International Travel to Mississippi in CY2001 via specific surveys at certain attractions. The following information is separate from the number of International Welcome Center Registrants.

FY2006 and FY2007 Visitor Sample

FY2007 target markets were determined for 17 countries where the MDA/Tourism Division has marketing activities, e.g., England, Scotland, Ireland, Canada, Holland, France, Denmark, Belgium, Switzerland, Sweden, Norway, Austria, Germany, Japan, Australia, Mexico, and Wales. Representation is from Best Choice (Germany), Lofthouse Enterprises (Europe) 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 in the state's five Tourism Regions with cities/areas. Table 10 data comprise complete information for FY2006/2007 in terms of target market countries.

The number of international visitors to surveyed attractions decreased by 11.6% from FY2006 to FY2007, based on survey respondents. This does not reflect actual rates of change for all international visitors, nor includes a significant number of Canadians, the state's largest market share with perhaps 35%-40% of all international visitors.

MDA/Tourism Division was honored in August 2007 with the Travel Industry Association (TIA) Mercury Award, to recognize International Travel Marketing and Promotion excellence. Nineteen travel writers from six different countries were flown to the Mississippi Gulf Coast in November 2006 to witness first-hand the devastation caused by Hurricane Katrina.

TABLE 10
TOP TARGET MARKETS FOR INTERNATIONAL
VISITOR ATTRACTIONS, FY2006 AND FY2007

Country	FY2006 Market Total	Target Percent FY2006 Total	Country	FY2007 Market Total	Target Percent FY2007 Total
England	5,554	43.5%	England	5,677	49.5%
Canada	1,937	15.2%	Canada	2,121	18.5%
Germany	1,031	8.1%	Germany	642	5.6%
Holland	721	5.6%	Scotland	507	4.4%
Scotland	662	5.2%	Ireland	494	4.3%
Ireland	633	4.9%	Australia	462	4.0%
Australia	550	4.3%	Sweden	395	3.4%
Sweden	432	3.4%	Holland	373	3.2%
France	275	2.2%	Japan	190	1.7%
Japan	209	1.6%	Norway	157	1.4%
Norway	175	1.4%	France	130	1.1%
Belgium	148	1.2%	Belgium	73	0.6%
Denmark	146	1.1%	Denmark	71	0.6%
Mexico	122	1.0%	Mexico	68	0.6%
Switzerland	117	0.9%	Switzerland	68	0.6%
Austria	50	0.4%	Austria	46	0.4%
			Wales	4	
Sub-Total	12,762	100.0%	Sub-Total	11,478	100.0%
Other	1,076	NA	Other	756	NA
Total	13,838	100.0%	Total	12,234	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.

NOTE: A rough estimate of FY2007 International visitors to Mississippi is approximately 190,000.

SOURCE: MDA/Tourism Division, 2007.

OUTDOOR RECREATION

Employment, payroll and revenue figures for the DWFP, U.S. Army Corps of Engineers, Vicksburg's National Military Park, Natchez's National Historical Park, Corinth Civil War Interpretive Center and Brice's Crossroads National Battlefield Site are in Appendices A-C.

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

DWF&P 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 \$8,357,566 in FY2007. The number of FY2007 nonresident fishing and hunting licenses totaled 126,820.

Mississippi's 24 State Parks had 238 cabins, 50 motel rooms and 1,679 campsites on 23,904 acres in FY2007. Table 11 lists FY2007 park visitation. Their FY2006/2007 employment figures are in Appendix A, with payroll data in Appendix B. Appendix C has estimated FY2006/2007 Tourism revenues from nonresident licenses and entrance fees.

Selected Federal Park and Recreation Areas

Vicksburg's National Military Park reported 772,977 FY2007 visitors, a 44.9% increase from FY2006. A significant proportion are from out-of-state and various countries. The Natchez National Historical Park accounted for 244,472 visitors in FY2007, a 5.4% increase versus FY2006. Their FY2006/2007 sales/fee collections are in Appendix C.

Vicksburg's District Office of the U.S. Army Corps of Engineers reported 7.4 million FY2007 combined visits at Arkabutla, Enid, Grenada and Sardis Lakes, a 34.3% increase over FY2006. Each visit, on average, lasted 3.8 hours. Columbus's Office of the U.S. Army Corps cited 2.77 million FY2007 total visits along the Tennessee-Tombigbee Waterway. The Corinth Civil War Interpretive Center had 21,509 visitors in FY2007 and Brice's Crossroads had 1,844.

TABLE 11
STATE PARK VISITATION, FY2007

Park	FY2007 Visits
Buccaneer	0
Clark Creek	6,024
Clarkco	63,883
Florewood	0
George P. Cossar	47,006
Golden Memorial	1,707
Great River Road	27,158
Holmes County	41,869
Hugh White	54,456
J.P. Coleman	74,470
John W. Kyle	66,152
Lake Lincoln	47,588
Lake Lowndes	79,344
LeFleur's Bluff	130,923
Legion	16,075
Leroy Percy	14,042
Nanah Waiya	NA
Natchez	20,370
Paul B. Johnson	148,719
Percy Quin	70,866
Roosevelt	88,798
Shepard	7,842
Tishomingo	50,344
Tombigbee	30,532
Trace	52,054
Wall Doxey	50,677
Total	1,190,899

NOTE: There were 24 state parks during FY2007. MDWFP began using a different system of estimating visitation in FY2007.

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2007.

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 FY2004 "Broader View" indicators in the spring of 2005. This "Broader View" enables Tourism—which is a "Composite Industry" comprising different sectors of the economy—to be more clearly and precisely defined within the overall economy.

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

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

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

Mississippi's GSP was \$79.8 billion in CY 2005 and \$84.2 billion in CY 2006. About $\frac{1}{4}$ of Mississippi's GSP was in Goods-Producing Sectors; $\frac{3}{4}$ in Services-Producing Sectors. Total Value Added is the contribution of a given industry or sector to GSP. Tourism's Total Value Added of Mississippi's GSP, was \$3.2 billion, or 4.0%, in FY2006; and \$4.2 billion, or 5.0% in FY2007. Tourism's 5.0% total impact of GSP is lower than Tourism's Employment concentration of 7.4% and Tourism's 8.1% slice of General Fund Revenues. The direct portion only of FY2007 Total Value Added to expenditures shows that 42 cents out of each Tourist Dollar spent, including TCI, stays in Mississippi. Tourism's direct value added was \$2.4 billion in FY2007, or 2.9% of GSP. TCI's direct value added was \$334.3 million, or 0.4% of GSP.

Food services and drinking places, lodging, casino gaming, gasoline stations/other retail, recreation, TCI and transportation were part of the Tourism Industry GSP. Casino gaming, food services and drinking places, and lodging comprised a major portion of Mississippi's Tourism Industry GSP in FY2007. This industry's composite nature needs to be emphasized.

Mississippi's economy reflected a FY2007 unemployment rate of 6.6%, based on a 12-month average. The state had a civilian labor force of 1,315,300, with an average of 86,300 unemployed persons in FY2007. Metropolitan Statistical Areas (MSAs) for counties with a significant Tourism industry had these FY2007 unemployment rates: 7.2% for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 6.9% for Pascagoula (Jackson and George counties); 5.0% for Hattiesburg (Forrest, Lamar and Perry counties); and 5.3% 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 7.1% unemployment rate in FY2007. Memphis's MSA includes DeSoto and Tunica Counties. DeSoto County's FY2007 unemployment rate was 4.1%; Tunica County's was 8.3%.

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 a Social Accounting Matrix (SAM). The FY2006/2007 Employment Multipliers for Mississippi were 1.38 and 1.44, respectively. The 75,200 estimated statewide direct FY2006 Tourism jobs resulted in an additional 28,685 indirect plus induced jobs or 103,885 total jobs associated with Tourism. The 85,300 statewide direct Tourism jobs in FY2007 resulted in an additional 37,295 indirect plus induced jobs. Total FY2007 jobs associated with Tourism were 122,595. FY2007 Employment multipliers varied by description—1.43 for lodging, 1.25 for food services and drinking places, among many others.

Labor Income Multipliers (Indirect/Induced)

Payroll or labor income earned by an employee results in additional money spent by the firm (indirect) and by the individual (induced). Mississippi's FY2006 Labor Income Multiplier was 1.46 based on total labor income of \$2.04 billion—\$1.4 billion (direct) and \$637.4 million (indirect/induced). The FY2007 Labor Income Multiplier for Mississippi was 1.41 with Total labor income of \$2.44 billion—\$1.724 billion (direct) and \$714.3 million (indirect/induced). IMPLAN codes were used to compute the FY2006/2007 Labor Income Multipliers.

Tourism Exports and Imports

Mississippi's net balance of Tourism Trade, defined as Tourism Exports (expenditures from out-of-state visitors in Mississippi) minus Tourism Imports (expenditures out of Mississippi), showed an estimated FY2007 surplus of about \$1 billion, similar to the \$1 billion balance in FY2006. Out-of-state visitors spent an estimated \$4.65 billion in Mississippi, or 81.0% of the \$5.74 billion spent by tourists/visitors in FY2007. Mississippians spent about \$3.65 billion traveling out-of-state. The Mississippians traveling within their state—at least 50 miles or more, one-way—spent an estimated \$1.1 billion on FY2007 in-state trips.

Estimated Effective Tax Rates

The Center for Policy Research and Planning, Mississippi IHL, estimates total additions to the General Fund, by tax bracket. MDA/Tourism Division'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 \$73.2 million in Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY2006, plus another \$13.2 million from the estimated Tourism-related construction activity tax. An estimated \$91 million in Tourism-related personal income tax, sales tax and all other taxes were FY2007 General Fund additions, or +24.4% versus FY2006. The estimated FY2007 Tourism-related construction activity tax monies in the General Fund were \$18.8 million, or +42.0% versus FY2006. These construction activity tax monies were influenced by post-Katrina construction.

Employment Rankings

The Tourism Industry ranked 6th in total estimated FY2007 direct employment, behind Government, Manufacturing, Wholesale/Retail Trade, Health Care & Social Assistance, and Professional & Business Services. Most of the direct FY2007 Tourism jobs—an estimated 83,600 of the 85,300 statewide direct Tourism jobs or 98.0%—were private sector ones (hotels/motels, restaurants, casinos). The other 2.0% were held by employees in state parks, federal parks, private outdoor recreation, regional and international airports, museums, historic sites, state/local Tourism offices, museums, performing arts centers and spectator sports sites.

Mississippi's 85,300 statewide direct Tourism jobs in FY2007 equaled 7.4 of the state's establishment-based nonfarm jobs, per Appendix F. In FY2006, the 75,200 statewide direct Tourism jobs were 6.7% of all jobs, per Appendix E. The state's nonfarm employment rankings reflect sectors and super sectors, per their definition on page 26. Table 12 presents Mississippi's FY2007 nonfarm, establishment-based employment rankings by the top sectors/super sectors.

TABLE 12
MISSISSIPPI NON FARM ESTABLISHMENT-BASED EMPLOYMENT RANKINGS
TOP SECTORS/SUPER SECTORS, FY2007

Sector	FY2007 Establishment Based Employment	FY2007 Employment Percentage	FY2007 Rank
Government (1)	241,235	20.9%	1
Manufacturing (2)	173,790	15.1%	2
Wholesale/Retail Trade (3)	172,430	15.0%	3
Educational & Health Services (4)	125,015	10.8%	4
Professional & Business Services (5)	94,415	8.2%	5
Tourism (6)	85,300	7.4%	6
Leisure & Hospitality (7)	55,520	4.8%	7
Construction (8)	52,725	4.6%	8
Transportation & Warehouse/Utilities (9)	46,605	4.0%	9
Financial Activities	46,330	4.0%	10
Other Services (10)	36,300	3.1%	11
Information	13,615	1.2%	12
Natural Resources & Mining	9,585	0.8%	13
Total Employment	1,152,865	100.0%	NA

1. Excludes an estimated 1,700 Tourism jobs funded by public monies--State Tourism Office, Regional/International Airports, Museums, Historical Sights, Performing Arts, etc. It includes all public sector employment--Health Care, Education, etc.
2. Durable goods comprised 115,725 jobs, or 2/3, of Manufacturing jobs.
3. Retail Trade was the dominant component with 135,400 non-Tourism jobs. Does not include an estimated 8,245 Tourism jobs directly related to Retail Trade.
4. Health Care & Social Assistance was the dominant component with 108,970 jobs.
5. Excludes Tourism-related Advertising.
6. Includes Accommodations, Food Services, Amusement, 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 27. Those jobs not directly related to Tourism are included in the Leisure & Hospitality Super Sector. Appendix A includes a breakdown of the FY2007 direct statewide Tourism jobs.
7. Reflects the Leisure & Hospitality employment not related to Tourism.
8. Excludes Tourism-related Construction.
9. Excludes Tourism-related Transportation.
10. Excludes Tourism-related Laundry Services, Passenger Car Rental, and Travel Arrangement/Reservations.

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

SOURCE: Mississippi Department of Employment Security, LMI Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, 2007.

LOCAL LEVEL INDICATORS

Local Tourism indicators include economic impact based on hotel/motel tax levies and restaurant taxes collected, 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% state sales tax. 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, but do not include tax revenues from state-licensed casinos, nor gasoline taxes.

MDA/Tourism's Division Research Unit began tracking the estimated portion of the state sales tax returned to cities attributed to Tourism in FY2004. This enabled our Unit to monitor an important revenue source for municipalities, plus estimate their Tourism-related portion.

FY2006 computations were made for nearly 300 municipalities. An estimated \$36 million allocated to municipalities from FY2006 state sales taxes were attributed to Tourism. FY2007 data were computed for roughly 300 municipalities, with an estimated \$37.7 million, allocated locally from FY2007 state sales taxes, attributed to Tourism, +4.8% versus FY2006.

Appendices E and F present the estimated portion of the state sales tax that went into the cities' General Fund, attributed to Tourism, by county.

Room/Restaurant Tax Revenue

Room/Restaurant tax percentages range from 1.0% to 5.0%. Table 13 presents these tax percentages by jurisdiction, plus FY2007 gross Tourism special tax revenue. About \$32.75 million, or 2/3, of the gross FY2007 special tax revenues were from restaurant sales with \$15.7 million, or 1/3, from lodging sales. Special tax revenues totaled \$48.4 million. Baldwyn received special tax revenues for the first time in late FY2007.

County Tourism Expenditures/Employment and Hotel/Motel Room Data

Estimated FY2006/2007 Tourism expenditures and employment data for the state's 82 counties, estimated Tourism employment percentage, and TCI comprise Appendices E and F, respectively. The sum of the county level Tourism Expenditures is less than the total estimated statewide Tourism expenditures, per the first set of footnotes.

Mississippi's 609 total hotel/motel properties as of June 30, 2007, reflected a 4.1% increase compared to the 585 total hotel/motel properties as of June 30, 2006, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms increased from a 45,774 as of June 30, 2006, to 51,087 as of June 30, 2007, or 11.6%, per Appendix G. It's estimated that 4,000 new statewide hotel/motel rooms were under construction between July–October 2007, or 7.8% above June 2007 inventory levels.

Mississippi had an estimated 150 Bed & Breakfasts (B&B's) as of June 30, 2007, with 728 total B&B rooms, 565 cabin rooms, 1,056 condo/timeshare rooms and 10,661 recreational vehicle (RV) spaces with electricity and water, per the FY2007 MDA/Tourism Division survey.

Mississippi's statewide estimated room availability, including summer 2007 construction projects, was 57,428 rooms. This included 51,087 hotel/motel rooms in place; 4,000 hotel/rooms under construction; 720 B&B rooms; 565 cabin rooms; and 1,056 condo/time share rooms. The Mississippi Gulf Coast, as of December 2007, had about 11,200 total hotel/motel rooms, equally divided between casino and non-casino properties. This does not include condos.

The 12-month statewide average daily rate (ADR), based on STR and Mississippi State Tax Commission data through June 2007, was \$71.20. Mississippi's estimated 12-month statewide occupancy percent was 61.2 using STR. These STR indicators include corporate and franchise properties, but not the state-licensed casino hotels, whose occupancy percent (83.0) were much higher than the STR statewide figures, per Table 9. State-licensed casino hotel rooms accounted for 11,660, or 22.8%, of all statewide hotel/motel rooms in FY2007.

Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY2007

Our 56 Tourism Partners—CVB's, Tourism Commissions, Chambers, etc.—received FY2007 Advertising and Employment/Payroll mini-surveys for the October 2006 – September 2007 time frame. Twenty-five responded to the Advertising survey and 31 to the Employment one, including some zeros. Most of the CVB's responded; a lesser portion of the non-CVB's did so.

FY2007 Tourism Employment/Payroll data reflected 144 full-time equivalent staff with a \$6.4 million payroll, based on participating Tourism Partners. The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category. These respondents—as a group—reflected a total estimated FY2007 Tourism Budget of \$25.8 million.

The Advertising-related survey responses indicated that respondents spent: \$522,324 in Ad Agency fees; almost \$4.2 million in Ad Placement costs; another \$543,777 in Ad Production costs; \$324,881 for Promotional items; \$239,931 for Trade Show Participation costs; \$53,609 for FAM Tours; \$594,148 for Billboard Advertising; \$565,007 for Brochure and Collateral Printing; \$189,794 in Other Printing; \$1,169,583 in Sponsorships; \$267,701 for web site maintenance; \$331,837 in State Matching Grant funds; and \$74,646 from other Grant Programs.

About \$9.05 million were spent by the respondents for the various line items in the prior paragraph, with \$4.17 million of this amount, or 46.1%, on Ad Placement. These figures will vary from year-to-year, but provide useful local level Tourism Industry indicators/developments.

STATEWIDE TOURISM LINKS

Film Productions, Documentaries and Commercials

On March 13, 2007, Governor Haley Barbour, signed into law the new Mississippi Motion Picture Incentive Program. The new program enhances the production rebate on a production's local spend to 20-25-30% and adds a 10% rebate for the wages of non-resident cast and crew. Along with the established tax exemptions and reductions, the Mississippi program becomes one of the country's best.

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

In FY2007, the Mississippi Film Office coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films, and commercials. While each project created direct economic impact and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up, and location fees all add to the total impact of filming on location. Every corner of the state saw production activity.

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

Selected State Agencies with Tourism Links: FY2007 Operations/Budget Mini-Surveys

The Mississippi Arts Commission (MAC), Mississippi Gaming Commission (MGC), and others, furnished major objects of expenditure data. These mini-surveys estimated a portion of Tourism's "Government Expenditures", a complementary component to TCI and tourist/visitor expenditures. FY2007 (state) Government Expenditures were \$22.1 million. This is "over and above" the dollars budgeted and spent by Mississippi's city/county Tourism Offices/CVB's.

The MAC reported \$1.12 million in contractual services, and \$1.75 million in subsidies, loans and grants. This is separate from the (public funds component) Building Fund for the Arts Program. The MGC budgeted \$2.5 million for contractual and subsidies, loans and grants, with most of these funds in contractual. Our Pearl River Basin Development District had \$205,630 million for contractual and \$608,835 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget reflected \$3.08 million for contractual, plus \$601,149 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences indicated \$1.15 million for contractual services and \$102,000 for subsidies, loans and grants. During the 2006 Legislative Session the Mississippi Legislature appropriated \$6.462 million for the purpose of supporting Mississippi Tourism Advertising and Promotion in FY2007. MDOT spent \$4.35 million to maintain Welcome Centers and Rest Areas, including contract and routine expenses, and they funded a National Scenic Compact Scenic Byways Marketing Grant of \$163,600.

TABLE 13
ROOM/RESTAURANT GROSS SPECIAL TAX REVENUES BY TOURISM OFFICE, FY2007

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY2007 Room Tax Revenue	Gross FY2007 Restaurant Tax Revenue	Gross FY2007 Total Tax Revenues
Aberdeen	1.0	1.0	\$9,306	\$61,198	\$70,504
Baldwyn*	None	2.0	None	26,412	26,412
Batesville	3.0	3.0	125,980	701,936	827,916
Bay Springs	3.0	None	6,310	None	6,310
Canton	2.0	2.0	86,870	388,539	475,409
Cleveland	2.0	2.0	84,124	480,976	565,100
Clinton	2.0	None	105,047	None	105,047
Coahoma County	2.0	1.0	70,168	238,180	308,348
Columbus-Lowndes	2.0	2.0	265,766	1,217,380	1,483,146
Corinth	2.0	2.0	77,046	845,119	922,165
DeSoto County	2.0	2.0	697,333	4,309,706	5,007,039
Florence	None	2.0	None	149,258	149,258
Flowood	None	2.0	None	1,404,896	1,404,896
Greenwood	1.0	1.0	77,657	305,250	382,907
Grenada	2.0	1.0	90,975	277,645	368,620
Hancock County	2.0	None	129,382	None	129,382
Harrison County	5.0	None	5,136,250	None	5,136,250
Hattiesburg	2.0	2.0	533,956	3,840,173	4,374,129
Hernando	1.0	None	3,786	None	3,786
Holly Springs	2.0	2.0	33,609	178,287	211,896
Horn Lake	1.5	None	116,359	None	116,359
Indianola	2.0	2.0	31,824	239,112	270,936
Jackson (city)	4.0	2.0	2,521,134	5,007,803	7,528,937
Kosciusko	2.0	None	30,960	None	30,960
Lauderdale County	2.5	None	530,692	None	530,692
Laurel	2.0	2.0	123,813	1,063,909	1,187,722
Magee	1.0	1.0	18,651	159,679	178,330
McComb	3.0	None	154,346	None	154,346
Montgomery County	2.0	None	17,638	None	17,638
Moss Point	3.0	None	326,095	None	326,095
Natchez	3.0	1.5	337,301	587,468	924,769
New Albany	2.0	2.0	37,479	420,026	457,505
Newton	\$1/room night	None	15,576	None	15,576
Ocean Springs	2.0	None	31,439	None	31,439
Oxford	2.0	2.0	177,621	1,549,538	1,727,159
Pascagoula	3.0	None	146,817	None	146,817
Pearl	None	2.0	None	561,310	561,310

TABLE 13 (CONTINUED)

Philadelphia	3.0	None	106,198	None	106,198
Picayune	2.0	1.0	54,249	366,930	421,179
Pontotoc	2.0	2.0	8,123	183,731	191,854
Rankin County	2.0	None	563,830	None	563,830
Richland	None	2.0	None	257,506	257,506
Ridgeland	1.0	1.0	161,610	898,600	1,060,210
Southaven	1.0	None	137,619	None	137,619
Starkville	2.0	2.0	142,315	1,154,768	1,297,083
Stone County	2.0	2.0	30,660	275,734	306,394
Tishomingo County	2.0	None	18,187	None	18,187
Tunica County	3.0	3.0	1,221,175	1,401,389	2,622,564
Tupelo	2.0	2.0	342,662	2,537,416	2,880,078
Vicksburg	3.0	1.0	619,843	722,014	1,341,857
Washington County	1.0	1.0	68,206	479,667	547,873
West Point	1.0	1.0	19,426	199,195	218,621
Yazoo County	2.0	2.0	38,212	260,319	298,531
Total			\$15,683,625	\$32,751,069	\$48,434,694

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.

* Baldwin began collecting their Restaurant Taxes in April 2007, or FY2007.

SOURCE: Mississippi State Tax Commission, 2007.

Tourism Capital Investment (TCI) FY2007 Surveys

MDA/Tourism Division's Research Unit, with input from MDA/Regional Services Division, City Building/Permit Departments, McGraw-Hill Construction/Dodge, Tourism Offices, Chambers of Commerce, state agencies, and others, updated the FY2007 TCI data. Appendices E and F present the estimated FY2006 and FY2007 TCI expenditures by county. TCI valuation is based on commercial permits issued and the Tourism factor for new construction and expansion and/or renovation of Tourism-related businesses/projects. 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, but not land acquisition costs, site prep, casino/business equipment purchasing costs, condo "flipping," furniture placement, etc. Some entities don't provide, nor make TCI data available. TCI presents a "net" Tourism-related figure, or a portion of the estimated cost.

Total estimated statewide TCI in FY2006 was \$551.2 million, based on data secured, and \$895.6 million in FY2007, or a 62.5% increase. Some \$631 million, or about 70% of the FY2007 TCI, was from private sources. The other \$264.6 million, or 30%, comprised public monies, including federal, state, county and city sources. State-licensed casinos, including amenities, accounted for \$343 million in FY2007 TCI, or 38.3% of the \$895.6 million TCI.

The Mississippi Gulf Coast accounted for \$557.7 million in FY2007 TCI, or 62.3% 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 few years in post-Katrina projects. Harrison County TCI of \$467.3 million was 52.2% of the state's total TCI. Harrison County's TCI equaled 83.8%, or $\frac{5}{6}$, of the Mississippi Gulf Coast's TCI in FY2007.

Tunica County's \$29 million in FY2007 TCI comprised casino-related development, road/highway work, plus airport-related infrastructure, following projects finalized in FY2006.

The Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) FY2007 TCI was \$99 million, or about 11.1% of the \$895.6 million figure. New hotel/motel and renovation projects, retail establishments, plus infrastructure projects (airport and others) and parks were in the mix. Jackson's Convention Center was the most prominent one in terms of magnitude. This MSA's FY2006 TCI of \$59 million was 10.7% of the \$551.2 million statewide figure. In other words, the Jackson MSA's TCI/the statewide TCI was a nearly identical proportion in FY2006 and FY2007.

The Hattiesburg area (Forrest/Lamar counties) reflected \$61.3 million in FY2007 TCI, a 50% increase over FY2006 TCI levels. FY2007 examples included numerous restaurant and retail projects, new hotel/motel construction and expansion efforts, state park renovations, downtown projects and several major University of Southern Mississippi initiatives.

DeSoto County's \$30.2 million in FY2007 TCI comprised new hotels/motels, retail, new restaurants and expansion/renovation of others, arena and civic center renovations, plus significant infrastructure. Oxford plus some Lafayette County non-city TCI was about \$13.8 million. This included some retail, a parking garage, hotel development and condos. Tupelo's \$15.1 million for FY2007 TCI covered retail, museums, sports facilities, restaurants and infrastructure. Tishomingo County's \$1.3 million in FY2007 TCI had additional second home and lodges, marina development, state park repairs and other outdoor recreation projects.

Meridian/Lauderdale County's nearly \$16 million in FY2007 TCI covered a new hotel, new restaurants, infrastructure, Welcome Center site improvements, among other efforts. Greenville/Washington County reflected \$18.8 million for FY2007 projects such as a new casino/hotel and arena, plus infrastructure renovations. Vicksburg's \$15.9 million in FY2007 TCI pertained to a new casino project, restaurants, retail and infrastructure. Natchez reported \$16.1 million in FY2007—two new hotels, hotel-related renovations, plus casino improvements.

Sunflower County's \$3.3 million in TCI was the B.B. Museum and Delta Interpretive Center project. Oktibbeha County's \$1.8 million in TCI covered infrastructure, new retail and other projects. Pearl River County's \$1.6 million TCI-related projects included diverse small businesses such as new restaurants, several convenience stores, etc. Pike County's \$1.1 million in TCI featured new antiques/retail shops, infrastructure and Welcome Center improvements.

It is anticipated that the FY2008 TCI project "zeroes in" on city building/planning departments. The FY2008 TCI survey will be done between July-November 2008. This TCI figure should 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 makes use of statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. The IMPLAN 2006 state data intersect, but are not identical with, the FY2007 tourist/visitor data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by counties, cities and municipalities. Limitations at the city/county level include the difficulty in assigning percent figures in terms of tourists/visitor sales, e.g., a city/county whose restaurant sales to tourists/visitors comprise 25.0% of these sales, or another city/county where these the corresponding figure is 10.0% of this total.

GLOSSARY

Balance of Tourism Trade: Tourism Exports minus Tourism Imports.

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

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

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

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

Fiscal Year (FY) 2007: July 2006–June 2007.

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

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

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

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

IMPLAN: A nationally recognized economic impact model to estimate the economic activity associated with a sale of a good or service. It is the basis for indirect/induced impacts. The direct + indirect + induced/direct impacts are a Social Accounting Matrix (SAM).

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).

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

Mississippi Tourism Economic Impact Model: This model estimates Tourism employment, payroll, expenditures, General Fund revenues, Capital Investment and Total Value Added. It reflects Tourism's economic impact and contributions for a rural state with coastal counties.

Multipliers: The direct impact plus the indirect impact plus the induced impact/the direct impact, or Type SAM multipliers. It's an indicator of linkages in the economy.

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

North American Industry Classification System (NAICS) Codes: Two-to-six digit codes in the 1997 NAICS/Standard Industrial Classification (SIC) Code United States Manual.

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

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

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

Sub-Sectors/Industry Groups: Three-to-six digit categories—311 Food Manufacturing under 31 Manufacturing and 447 Gasoline Service Stations under 44 Retail Trade.

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

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

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

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

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

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

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

Tourism Imports: Expenditures by Mississippi residents outside the state.

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

Tourist/Visitor: Person/Travel Party making a 100-mile or more round trip from their household and/or from out-of-state to enjoy the history, scenery and attractions of another community. It includes in-state and out-of-state overnight leisure, day leisure, day/overnight business, group travelers, International visitors, and the combined business/leisure travel segment.

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Coahoma County. Daniel Vassel, County Administrator.

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

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

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

Meridian Airport Authority. Debbie Moulds, Executive Assistant.

Mid-Delta Regional Airport. Lane Rodgers, Director.

Tunica County Airport. Cliff Nash, Executive Director.

Tupelo Municipal Airport. Margot Ganaway, Executive Assistant.

Jackson County Economic Development Foundation. Helen Gardner, Special Projects Manager.

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Tunica County. Clifton Johnson, County Administrator; Susie White, County Clerk.

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

Washington County. Elizabeth Smith, County Administrator.

Tourism Capital Investments:

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

Brandon, City of. Debbie Barrick, Community Development.

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

D'Iberville, City of. Jeff Taylor, City Planner.

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

Forest, City of. N. Randall George, City Clerk's Office.

Gautier, City of. Johnny Williams, Planning Department.

Greenville, City of. Carlon Williams, Planning Department.

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

Gulfport, City of. Paula Doyle, Planner II.

Harrison County Code Administration. Theresa Hydrick, Office Manager.
 Hattiesburg CVB/Visitors Center. Kristen Brock and Christy McSwain.
 Hernando, City of. Angie Percy, Building Official.
 Hinds County Economic Development District. Benjie Barham, Director, Business Development.
 Holly Springs CVB. Stephanie Movre, Executive Director.
 Horn Lake, City of. Brenda Cook, Planning Department.
 Iuka, City of. Cindy Nelson.
 Jackson, City of. Ken Taylor.
 Kosciusko, City of. Dewitt Adcock, Building Inspector.
 Lawrence County Community Development. Bob Smira, Executive Director.
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 McGraw-Hill Construction/Dodge. Shawn LaRoche, Economic Analyst.
 Madison County Economic Development Authority.
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 Mississippi DFA. Bama S. Strong, Systems Analyst.
 Mississippi Department of Transportation (MDOT). Al Brantley, P. E., Assistant State Planning Engineer; Robby Burt, P.E.,
 Transportation Planner, Planning Division; John Vance, P.E., State Maintenance Engineer; Allyson A. Johnson,
 Staff Officer I.
 MAC. Judi Pulliam, Director of Grants and Special Initiatives.
 Ocean Springs, City of. Marie Starr, Deputy Tax Collector; André Kaufman, Director of Public Works.
 Olive Branch, City of. Bennie Epps, Building Director.
 Oxford CVB. Mary-Kathryn Millner, Tourism Manager; Brooke Coward.
 Pass Christian, City of. Gene Peralta.
 Pearl, City of. Lorraine Knight, Building Permit Specialist.
 Pearl River Basin Development District. Paul Collins, Park Administrator, Sr.
 Pearl River Valley Water Supply District. Susan McMullan, Director of Finance.
 Philadelphia, City of. James Johnson, Building Official.
 Picayune, City of. Diane Miller, Administrative Assistant.
 Poplarville, City of. Linda DuPont, Building Permits Official.
 Richland, City of. Ann Grantham, Public Works/Community Development.
 Simpson County Development Foundation.
 Southaven, City of. Jean Vowell, Building/Permit Department.
 Tishomingo County Development Foundation. Gary Matthews, Economic Development Director.
 Tupelo CVB. Pat Raspberry, Assistant Director.
 U.S. Army Corps of Engineers, Bay Springs Site Office. Stanley Perry, Manager.
 Vicksburg-Warren County Chamber of Commerce. Christi Kilroy, Executive Director.
 West Point, City of. Building Inspector.
 U.S. Army Corps of Engineers. Lawran Richter, Outdoor Recreation Planner, Vicksburg Headquarters. Ralph Antonelli, Park
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 Natchez Trace Parkway. Janet Battle, Manager, Human Resources Office.
 Shiloh National Military Park/Corinth Site. Stacy D. Allen, Chief Ranger.
 Tupelo Visitor Center (Natchez Trace Parkway). Don Carney, Manager.
 Vicksburg National Military Park. Shirley Smith, Human Resources Assistant.

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APPENDICES

APPENDIX A
ESTIMATED TOURISM EMPLOYMENT
FY2006 AND FY2007

CATEGORY	FY2006	FY2007	CHANGE
Food Services & Drinking Places (1)	24,680	24,533	-0.6%
Lodging (2)	10,747	10,800	0.5%
Gaming (3)	23,272	30,100	29.3%
Retail Trade (4)	8,230	8,245	0.2%
Support Activities, Air Transportation (5)	1,433	1,494	4.3%
Air Passenger, Scheduled & Chartered (5)	246	273	11.0%
Scenic & Sightseeing Transportation	53	47	-11.3%
Charter Bus Industry	109	111	1.8%
Taxi Service	33	30	-9.1%
Sub-Total, Transportation	1,874	1,955	4.3%
Travel Arrangement/Reservations	389	361	-7.2%
Passenger Car Rental	187	198	5.9%
Parking Lots & Garages	NA	18	NA
Advertising & Related Services	173	179	3.5%
Laundry Services	154	147	-4.5%
Sub-Total, Other Services	903	903	0.0%
Motion Picture Theaters	170	176	3.5%
Motion Picture & Video Production	76	70	-7.9%
Museums, Historical Sights & Similar (6)	177	193	9.0%
Bowling Centers	53	70	32.1%
Performing Arts, Spectator Sports & Related (6)	197	220	11.7%
Golf Courses (6)	863	898	4.1%
Marinas (6)	75	97	29.3%
Amusement Parks & Arcades	56	53	-5.4%
Sub-Total, Private/Public Entertainment/Recreation	1,667	1,777	6.6%
State Parks, Federal & Private Outdoor Recreation (7)	580	314	-45.9%
State, City, County Tourism Offices and State Agencies (8)	310	373	20.3%
Sub-Total, State/Local/Federal Government, State Parks...	890	687	-22.8%
Construction	2,937	6,300	114.5%
TOTAL	75,200	85,300	13.4%

APPENDIX A (CONTINUED)

This Appendix Includes:

1. Alcohol/nonalcohol Restaurants, Drinking Places, among other establishments.
2. Estimates based on Mississippi Department of Employment Security data for Hotels & Motels (NAICS 72111), Other Traveler Accommodations (NAICS 72119) and RV Parks & Recreational Camps (NAICS 7212), some Residential Property Managers (NAICS 531311).
3. Based on Mississippi Gaming Commission quarterly surveys and the data include state-licensed casino hotel employees.
4. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops, Antiques & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; Pre-recorded Tape, Compact Disc and Record Stores.
5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.
6. Includes some government jobs.
7. Includes Outfitters, Guides, among other employment for FY2006. This category is included in Appendices B and C. FY2006 featured an MDA/Tourism Division Outdoor Recreation Survey. The U.S. Army Corps of Engineers Columbus and Vicksburg Districts are included; ditto for the Natchez Trace Parkway, Vicksburg Military Park, Natchez National Historical Park, Brice's Crossroads National Battlefield Site, Shiloh National Military Park/Corinth Site, and National Forests in Mississippi.
8. Includes the staff at Mississippi's 12 Welcome Centers, MDA/Tourism Division, local Tourism Offices, in addition to some other State Agencies--the Mississippi Arts Commission, the Mississippi Gaming Commission, Pearl River Basin Development District, and the Pearl River Water Supply District.

SOURCES: Mississippi Arts Commission, 2007.

Mississippi Department of Employment Security, LMI Department, 2007.

Mississippi Department of Wildlife, Fisheries & Parks (DWF&P), 2007.

MDA/Tourism Division, 2007.

Mississippi Gaming Commission, 2007.

Mississippi Museum of Natural Science, 2007 (under DWF&P).

Mississippi State Tax Commission, 2007.

Pearl River Basin Development District, 2007.

Pearl River Water Supply District, 2007.

APPENDIX B
ESTIMATED TOURISM PAYROLL
FY2006 AND FY2007

CATEGORY	FY2006 PAYROLL	FY2007 PAYROLL
Food Services & Drinking Places	\$266,613,896	\$267,541,414
Lodging (1)	\$117,147,307	\$119,223,461
Gaming (2)	\$619,729,541	\$789,034,615
Retail Trade (3)	\$134,796,498	\$141,961,258
Support Activities, Air Transportation	57,543,090	60,283,689
Air Passenger, Scheduled & Chartered	8,128,857	9,313,234
Scenic & Sightseeing Transportation	974,160	763,278
Charter Bus Industry	1,942,733	2,139,238
Taxi Service	1,004,709	944,126
Sub-Total, Transportation	\$69,593,549	\$73,443,565
Travel Arrangement/Reservations	8,642,002	8,797,409
Passenger Car Rental	4,672,785	4,810,426
Parking Lots & Garages	NA	259,252
Advertising & Related Services	5,675,070	6,112,327
Laundry Services	2,618,535	2,638,788
Sub-Total, Other Services	21,608,392	22,618,202
Motion Picture Theaters	1,375,490	1,503,378
Motion Picture & Video Production	1,750,881	1,751,678
Museums, Historical Sights & Similar	4,896,617	5,303,939
Bowling Centers	761,615	814,219
Performing Arts, Spectator Sports & Related	4,188,523	4,799,378
Golf Courses	14,406,163	15,113,471
Marinas	1,846,299	2,319,584
Amusement Parks & Arcades	788,126	536,567
Sub-Total, Entertainment/Recreation	\$30,013,714	\$32,142,214
State Parks, Federal & Outdoor Recreation (4)	20,414,919	16,425,338
State, City, County Tourism Offices/Agencies (5)	12,664,707	14,009,138
Sub-Total, State/Local/Federal Government, State Parks...	\$33,079,626	\$30,434,476
Construction	\$111,403,266	\$247,600,795
Total	\$1,403,985,789	\$1,724,000,000

APPENDIX B (CONTINUED)

This Appendix Includes:

1. Does not include the payroll of employees at state-licensed casino hotels or the Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos plus the employees at state-licensed casino hotels. Data do not reflect the estimated payroll of casino and hotel employees at the Pearl River Resort.
3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; Prerecorded Tape, Compact Disc and Record Stores.
4. Included Outfitters, Guides, among other staff payroll in FY2006. The FY2007 data reflects survey responses from the U.S. Army Corps of Engineers, Columbus and Vicksburg Districts; ditto for the Natchez Trace Parkway, Vicksburg Military Park, Natchez National Historical Park, Brice's Crossroads National Battlefield Site, Shiloh National Military Park/Corinth Site, the National Forests in Mississippi, plus administrative Parks payroll at the DWF&P.
5. Includes staff payroll at Mississippi's 12 Highway Welcome Centers, MDA/Tourism Division, local Tourism Offices, State Agencies such as the Mississippi Arts Commission, the Mississippi Gaming Commission, Mississippi Museum of Natural Science, Pearl River Basin Development District and the Pearl River Water Supply District.

SOURCES: Mississippi Arts Commission, 2007.
Mississippi Department of Employment Security, LMI Department, 2007.
Mississippi DWF&P, 2007.
MDA/Tourism Division, 2007.
Mississippi Gaming Commission, 2007.
Mississippi Museum of Natural Science, 2007 (under DWF&P).
Mississippi State Tax Commission, 2007.
Pearl River Basin Development District, 2007.
Pearl River Water Supply District, 2007.

APPENDIX C
ESTIMATED TOURISM
EXPENDITURES, FY2006 AND FY2007

CATEGORY	FY2006	FY2007	CHANGE
Restaurants	\$849,428,995	\$869,465,827	2.4%
Quick-Stop, Specialty Food & Grocery Stores	469,889,660	486,706,413	3.6%
Concessions Quick Food	71,251,976	70,624,582	-0.9%
Bar & Beer Parlors	35,329,422	46,814,281	32.5%
Lodging	532,279,940	520,606,662	-2.2%
Gaming (1)	1,620,542,666	2,007,094,014	23.9%
Department & General Merchandise (NEC)	733,270,670	785,865,092	7.2%
Apparel & Accessories	48,937,625	47,384,147	-3.2%
Miscellaneous Retail (NEC)	70,190,546	75,932,543	8.2%
Gift, Novelty & Souvenir	67,952,811	74,674,192	9.9%
Sporting Goods, Bicycle & Music/Book Stores	35,817,989	41,615,423	16.2%
Camera & Photographic Stores	11,687,034	11,241,975	-3.8%
Antique & Secondhand Stores	14,231,648	11,514,581	-19.1%
Cigar Stores & Stands & Drug Stores	30,956,668	28,077,884	-9.3%
Gaming Related Gift/Novelty (2)	41,941,513	74,429,856	77.5%
Gasoline at 18 cents (3)	341,306,569	335,445,929	-1.7%
Gasoline Service Stations	30,032,427	29,335,698	-2.3%
Diesel Fuel at 18 cents (3)	43,039,277	42,809,281	-0.5%
Fixed Facilities, Air Transportation (4)	9,412,960	36,026,004	282.7%
Rental & Leasing, Transportation	24,906,696	21,325,403	-14.4%
Auto Repair Shops & Accessories	32,510,020	32,794,826	0.9%
Water Passenger Transportation	185,943	34,031	-81.7%
Entertainment/Recreation (5)	73,474,526	66,813,168	-9.1%
Licensing Fees—Nonres Hunting & Fishing (6)	8,027,191	8,357,566	4.1%
National Historical Areas	956,988	1,021,971	6.8%
Advertising Specialties	2,214,005	1,773,100	-19.9%
Printing & Publishing	2,775,175	2,299,969	-17.1%
Laundries, Dry Cleaning	7,677,450	6,855,106	-10.7%
Total	\$5,210,228,390	\$5,736,939,524	10.1%

Appendix C (continued)

This Appendix Includes:

1. Net Tourist/Visitor Gross Gaming Revenues for 28 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, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY2006 and FY2007, based on scheduled/charter passenger service and Passenger Facility Charges.
5. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Motion Picture Shows; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Museums; State Parks, Federal & Private Outdoor Recreation.
6. Only the nonresident fishing and hunting licensing portion were computed.

SOURCES: American Automobile Association Web Site, 2007.

Mississippi DWF&P, 2007.

MDA/Energy Division, 2007.

MDA/Tourism Division, 2007.

Mississippi Gaming Commission, 2007.

Mississippi State Tax Commission, 2007.

U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2007.

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

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

Shiloh National Military Park/Corinth Site, Vicksburg National Military Park, 2007.

APPENDIX D
ESTIMATED TOURISM GENERAL FUND
REVENUES, FY2006 AND FY2007

CATEGORY	FY2006	FY2007	CHANGE
Restaurants	\$35,648,125	\$36,488,851	2.4%
Quick-Stop, Specialty Food & Grocery Stores	19,733,983	20,427,699	3.5%
Concessions Quick Food	2,992,655	2,965,014	-0.9%
Bar & Beer Parlors	1,483,837	1,964,639	32.4%
Lodging	22,245,456	21,851,929	-1.8%
Gaming (1)	105,425,896	132,694,698	25.9%
Department & General Merchandise (NEC)	30,792,625	33,032,460	7.3%
Apparel & Accessories	2,055,218	1,988,282	-3.3%
Miscellaneous Retail (NEC)	2,741,284	2,958,632	7.9%
Gift, Novelty & Souvenir	2,852,641	3,133,535	9.8%
Sporting Goods, Bicycle & Music/Book Stores	1,502,180	1,748,342	16.4%
Camera & Photographic Stores	484,729	469,261	-3.2%
Antique & Secondhand Stores	596,241	479,575	-19.6%
Cigar Stores & Stands & Drug Stores	1,300,159	1,179,405	-9.3%
Gaming Related Gift/Novelty (2)	1,761,544	2,962,946	68.2%
Gasoline Service Stations	1,254,112	1,229,515	-2.0%
Rental & Leasing, Transportation	716,192	607,161	-15.2%
Auto Repair Shops & Accessories	1,348,452	1,363,922	1.1%
Water Passenger Transportation	8,590	2,382	-72.3%
Entertainment/Recreation (3)	2,814,302	2,581,928	-8.3%
National Historical Areas	NA	29,573	NA
Advertising Specialties	89,925	73,483	-18.3%
Printing & Publishing	115,815	95,170	-17.8%
Laundries, Dry Cleaning	321,727	289,248	-10.1%
Construction Activity Tax (4)	13,229,472	18,780,559	42.0%
Personal Income/Sales Tax (5)	73,161,164	91,018,278	24.4%
Total	\$324,676,324	\$380,416,487	17.2%

Appendix D (CONTINUED)

This Appendix Includes:

1. Approximately \$132.7 million, or 71.4% of the \$185.8 million in General Fund Gaming Fees and Tax Transfers, were the "Net" Tourism Portion. The other \$53.1 million, or 28.6%, were not attributed to Tourism.
2. Estimated Tourism-related sales at the various retail shops.
3. The Entertainment/Recreation component includes: Marina Services; Public Golf Courses; Motion Picture Shows; Dance Halls, Night Clubs; Parks; Bowling, Billiards & Pool; College Athletics; Skating Rinks; Race Tracks; Aquariums, Botanical Gardens; Museums; State Parks, Federal & Private Outdoor Recreation.
4. The estimated Tourism-related portion of the General Fund based on TCI.
5. The estimated Tourism-related portion of the General Fund amount, based on estimated effective tax rates for Personal Income, Sales Tax and all other Taxes.

SOURCES: Center for Policy Research and Planning, Mississippi IHL, 2007.
Mississippi Department of Employment Security, LMI Department, 2007.
MDA/Energy Division, 2007.
MDA/Tourism Division, 2007.
Mississippi State Tax Commission, 2007.

APPENDIX E
ESTIMATED COUNTY TOURISM EXPENDITURES,
EMPLOYMENT AND TCI, FY2006

County	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to Cities Attributed to Tourism+	Tourism Capital Investment
Adams	\$89,505,924	2,100	16.0	\$895,069	\$920,080
Alcorn	42,187,616	717	5.1	525,117	452,506
Amite	2,063,084	24	1.4	19,553	NA
Attala	15,746,076	295	5.8	189,881	NA
Benton	797,869	11	0.9	9,030	NA
Bolivar	24,868,555	465	3.8	311,102	896,086
Calhoun	2,743,800	30	0.9	33,531	17,638
Carroll	929,945	15	1.3	8,506	NA
Chickasaw	5,106,539	80	1.3	60,385	120,985
Choctaw	1,071,576	14	0.6	12,548	6,721
Claiborne	2,467,856	37	1.1	12,063	519,666
Clarke	3,162,311	55	2.0	35,729	11,491
Clay	12,718,168	205	2.7	146,817	NA
Coahoma	92,835,819	1,280	13.3	271,746	1,667,348
Copiah	7,266,648	125	1.6	87,742	88,264
Covington	5,198,585	90	1.7	55,260	NA
DeSoto	195,378,529	3,290	7.9	2,433,223	25,866,545
Forrest ^	211,546,350	3,690	6.8	2,613,771	40,871,543
Franklin	880,983	13	0.8	7,775	233,877
George	7,084,355	102	2.3	73,417	1,878,422
Greene	1,186,081	12	0.7	10,161	NA
Grenada	32,797,957	650	5.8	399,057	2,217,552
Hancock	40,213,764	660	6.7	198,567	20,741,351
Harrison@	851,777,212	12,470	15.1	5,088,441	199,216,490
Hinds	353,679,368	6,535	4.6	4,166,990	24,092,808
Holmes	3,826,165	52	1.3	39,446	261,229
Humphreys	2,384,159	24	0.9	24,542	37,500
Issaquena	98,930	2	1.1	330	NA
Itawamba	8,339,414	132	2.3	93,505	NA
Jackson	134,487,097	1,870	3.7	1,169,663	7,760,070
Jasper	3,082,959	44	1.1	34,132	NA
Jefferson	909,082	10	1.0	8,715	NA
Jefferson Davis	2,705,025	35	1.8	31,603	NA
Jones	50,752,572	770	2.5	600,554	610,706
Kemper	1,441,417	21	1.1	14,699	NA
Lafayette	66,512,569	1,275	6.8	718,364	13,098,610

APPENDIX E (CONTINUED)

Lamar^					
Lauderdale	119,690,110	1,915	5.2	1,428,856	11,612,291
Lawrence	2,702,781	33	1.3	29,835	50,000
Leake	8,722,164	102	1.8	104,306	36,250
Lee	223,900,177	3,650	6.9	2,845,867	12,806,070
Leflore	37,285,371	685	4.6	453,176	4,161,940
Lincoln	18,720,790	265	2.2	219,922	33,250
Lowndes	101,217,672	1,520	6.0	1,152,785	1,967,032
Madison	141,363,011	2,050	4.6	1,751,385	11,639,437
Marion	10,173,329	135	1.8	116,129	70,635
Marshall	10,624,397	175	2.5	107,819	789,700
Monroe	15,767,200	245	2.1	185,835	198,350
Montgomery	6,653,233	72	2.3	81,409	394,100
Neshoba #	36,625,534	430	NA	437,246	1,640,706
Newton	5,957,888	76	1.2	72,800	66,795
Noxubee	4,278,811	48	1.7	36,252	NA
Oktibbeha	53,893,839	945	4.5	592,582	1,675,720
Panola	19,754,906	288	2.7	230,346	94,350
Pearl River	20,743,954	260	2.5	236,171	301,940
Perry	2,045,476	28	1.1	21,696	134,304
Pike	33,270,639	525	3.3	377,534	1,029,530
Pontotoc	6,670,963	75	0.6	81,377	328,124
Prentiss	6,630,518	82	1.1	79,959	3,735
Quitman	1,250,312	13	0.8	15,266	NA
Rankin	131,275,804	2,985	5.4	1,463,700	22,807,022
Scott	16,293,006	220	1.8	181,527	676,403
Sharkey	1,157,961	12	1.1	14,547	30,340
Simpson	10,153,452	120	1.5	127,035	177,455
Smith	1,652,373	16	0.5	19,854	NA
Stone	6,847,055	85	2.5	76,666	456,509
Sunflower	10,650,724	160	1.7	129,077	115,938
Tallahatchie	1,826,680	25	0.8	18,574	NA
Tate	9,513,332	172	2.9	115,772	2,580,000
Tippah	6,358,049	82	1.1	78,057	NA
Tishomingo	9,435,824	160	2.9	99,260	2,205,233
Tunica	1,143,632,066	14,000	95.7	68,440	111,456,071
Union	11,920,880	190	2.1	149,979	120,939
Walthall	2,420,147	35	1.2	26,341	177,606
Warren	213,615,384	4,170	17.4	1,257,245	7,125,414
Washington	75,594,659	1,395	7.0	704,546	9,603,475
Wayne	8,108,764	95	1.8	96,431	676,386

APPENDIX E (CONTINUED)

Webster	2,047,507	22	1.0	23,909	50,025
Wilkinson	2,193,678	26	1.3	22,194	28,708
Winston	14,365,317	243	4.5	168,749	1,359,568
Yalobusha	2,159,798	30	1.0	24,068	788,768
Yazoo	9,205,068	140	2.4	109,531	170,400
Total	\$4,856,124,962	75,200	6.7	\$36,035,089	\$551,228,007

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

#Neshoba County employment figures do not reflect estimated Pearl River Resort employment. Estimated Neshoba County 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 data are included with Forrest County as Hattiesburg area.

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

@ FY2006 TCI data for Harrison County was conservative due to market conditions.

+These dollar amounts only reflect the 18.5 % of the 7.0 % state sales that is returned to municipalities (cities). It does not include any state-licensed casino nor gasoline tax revenues. The county totals equal the sum of city data.

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management.

McGraw-Hill Construction/Dodge.

Mississippi Department of Employment Security, LMI.

MDOT.

Mississippi DWFP.

Mississippi State Tax Commission.

Mississippi Gaming Commission.

Many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2006.

APPENDIX F
ESTIMATED COUNTY TOURISM EXPENDITURES
EMPLOYMENT AND TCI, FY2007

County	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to Cities Attributed to Tourism+	Tourism Capital Investment
Adams	90,419,577	2,200	17.3	\$933,939	\$16,089,602
Alcorn	41,526,124	705	5.0	524,419	167,501
Amite	1,719,371	20	0.9	19,774	3,699
Attala	15,740,743	290	5.4	188,901	244,838
Benton	826,277	10	0.8	9,484	3,699
Bolivar	26,866,888	500	4.2	328,266	372,303
Calhoun	2,776,797	30	0.9	34,003	342,750
Carroll	882,001	14	1.2	8,409	476,123
Chickasaw	5,034,572	80	1.2	59,485	3,699
Choctaw	1,020,424	13	0.7	12,042	5,199
Claiborne	2,047,848	32	0.9	9,783	468,120
Clarke	3,186,502	57	2.0	36,236	69,353
Clay	13,127,372	210	3.2	151,138	1,019,865
Coahoma	57,378,872	1,035	11.7	271,566	48,427
Copiah	6,844,847	120	1.5	82,352	1,061,272
Covington	5,212,777	73	1.4	53,797	NA
DeSoto	209,502,418	3,400	7.4	2,644,163	30,235,131
Forrest ^	227,542,650	4,000	6.9	2,777,309	61,334,422
Franklin	1,105,871	16	0.9	8,329	94,299
George	7,758,945	105	2.3	81,547	193,482
Greene	1,370,152	14	0.7	10,980	108,434
Grenada	34,173,929	655	5.9	417,863	86,286
Hancock	115,241,091	1,890	15.1	356,461	44,093,530
Harrison	1,342,950,816	22,000	24.7	6,311,354	467,266,933
Hinds	323,444,959	6,370	4.5	3,833,351	60,287,678
Holmes	3,829,181	52	1.1	39,761	263,667
Humphreys	2,326,450	22	0.8	24,059	37,500
Issaquena	106,787	2	1	420	NA
Itawamba	8,615,892	136	2.1	97,685	21,637
Jackson	126,215,877	1,840	3.7	1,133,520	46,353,143
Jasper	3,135,028	45	1.1	34,704	3,699
Jefferson	844,273	10	0.9	8,744	5,248
Jefferson Davis	2,484,797	30	1.5	29,625	NA
Jones	47,804,966	700	2.1	486,757	640,116
Kemper	1,409,082	20	1.0	14,499	81,451
Lafayette	77,289,936	1,425	7.1	942,407	13,767,442

APPENDIX F (CONTINUED)

Lamar^					
Lauderdale	117,353,732	1,915	5.0	1,394,769	15,968,000
Lawrence	2,602,433	32	1.2	28,697	47,981
Leake	8,517,541	93	1.7	101,385	995
Lee	226,830,481	3,655	6.8	2,829,853	15,059,906
Leflore	43,426,401	725	4.6	526,857	871,800
Lincoln	19,592,434	265	2.1	232,560	60,526
Lowndes	103,635,298	1,525	5.6	1,198,095	1,332,617
Madison	148,789,546	2,020	4.4	1,819,887	16,069,213
Marion	10,093,113	125	1.6	107,840	24,497
Marshall	10,883,228	175	2.6	137,214	237,461
Monroe	15,900,629	240	2.2	187,179	528,072
Montgomery	6,388,916	65	2.4	78,883	349,978
Neshoba #	28,414,144	405	NA	344,427	2,628,347
Newton	5,734,623	75	1.2	69,880	3,699
Noxubee	3,871,866	42	1.3	39,888	NA
Oktibbeha	55,498,561	960	4.6	642,891	1,764,065
Panola	20,185,032	290	2.5	231,572	77,625
Pearl River	20,069,190	245	2.4	228,041	1,583,357
Perry	1,995,056	24	0.9	20,757	45,136
Pike	30,595,815	480	2.9	341,451	1,113,719
Pontotoc	7,064,943	78	0.6	85,646	307,246
Prentiss	6,559,768	82	1.0	78,438	3,735
Quitman	1,262,308	13	0.8	15,387	NA
Rankin	137,609,255	2,555	4.3	1,486,709	20,002,288
Scott	16,791,114	200	1.7	200,818	440,772
Sharkey	1,179,595	12	1.1	14,875	NA
Simpson	11,351,312	150	1.9	143,099	1,628,750
Smith	1,802,869	17	0.5	\$21,184	3,699
Stone	7,066,255	87	2.0	78,850	22,304
Sunflower	10,889,949	166	1.5	133,886	3,277,875
Tallahatchie	1,773,294	25	0.9	18,866	NA
Tate	9,895,149	175	3.0	119,223	7,777
Tippah	6,606,101	85	1.1	81,398	90,568
Tishomingo	10,096,800	166	2.7	102,631	1,339,885
Tunica	1,143,963,396	13,800	91.7	70,287	29,048,453
Union	11,915,070	190	2.1	149,363	NA
Walthall	2,350,681	34	1.1	25,581	15,307
Warren	213,451,203	4,200	17.0	1,334,481	15,923,019
Washington	59,917,726	1,260	6.4	566,662	18,772,735
Wayne	7,654,510	85	1.5	90,029	1,302,030

APPENDIX F (CONTINUED)

Webster	2,038,167	22	1.0	25,055	38,500
Wilkinson	2,070,870	25	1.3	22,597	73,884
Winston	13,350,581	225	4.1	165,649	238,665
Yalobusha	2,413,607	31	1.0	27,143	5,366
Yazoo	9,320,515	140	2.4	113,850	17,759
Total	\$5,390,537,171	85,300	7.4	\$37,710,965	\$895,578,159

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 employment. 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 data are included with Forrest County as Hattiesburg area.

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

+ These dollar amounts only reflect the 18.5 % of the 7.0 % state sales that is returned to municipalities (cities). It does not include any state-licensed casino nor gasoline tax revenues. The county totals equal the sum of city data.

SOURCES: DFA, Bureau of Buildings and Grounds and Real Property Management.

McGraw-Hill Construction/Dodge.

Mississippi Department of Employment Security, LMI.

MDOT.

Mississippi DWFP.

Mississippi State Tax Commission.

Mississippi Gaming Commission.

Many other Economic Development and Tourism Offices, Chambers of Commerce, Cities/Counties cited in the Acknowledgments, 2007.

APPENDIX G
ESTIMATED HOTEL/MOTEL ROOM COUNT, FY2006/FY2007

County	Hotel/Motel Rooms (6-30-06)	Hotel/Motel Rooms (6-30-07)	Percentage Change
Adams	1,065	1,065	none
Alcorn	291	291	none
Amite	14	14	none
Attala	123	123	none
Benton	0	0	NA
Bolivar	440	460	4.5%
Calhoun	44	24	-45.5%
Carroll	15	0	-100.0%
Chickasaw	62	62	none
Choctaw	20	20	none
Claiborne	0	44	NA
Clarke	24	20	-16.7%
Clay	166	157	-5.4%
Coahoma	894	885	-1.0%
Copiah	80	144	80.0%
Covington	93	93	none
DeSoto	1,783	2,054	15.2%
Forrest*	2,222	2,421	9.0%
Franklin	6	7	16.7%
George	151	151	none
Greene	9	9	none
Grenada	715	796	11.3%
Hancock	402	661	64.4%
Harrison	4,282	7,650	78.7%
Hinds	5,210	5,461	4.8%
Holmes	66	66	none
Humphreys	50	52	4.0%
Issaquena	0	0	NA
Itawamba	62	62	none
Jackson	2,055	2,502	21.8%
Jasper	26	26	none
Jefferson	0	0	NA
Jefferson Davis	68	40	-41.2%
Jones	588	563	-4.3%
Kemper	35	35	none
Lafayette	704	664	-5.7%
Lamar*			

APPENDIX G (CONTINUED)

Lauderdale	1,755	1,742	-0.7%
Lawrence	30	30	none
Leake	56	56	none
Lee	1,668	1,812	8.6%
Leflore	724	731	1.0%
Lincoln	451	451	none
Lowndes	832	832	none
Madison	1,554	1,656	6.6%
Marion	120	120	none
Marshall	211	210	-0.5%
Monroe	201	153	-23.9%
Montgomery	159	165	3.8%
Neshoba	1,341	1,420	5.9%
Newton	95	95	none
Noxubee	64	64	none
Oktibbeha	707	707	none
Panola	429	428	-0.2%
Pearl River	286	170	-40.6%
Perry	15	0	-100.0%
Pike	469	451	-3.8%
Pontotoc	56	56	none
Prentiss	100	100	none
Quitman	0	0	NA
Rankin	1,397	1,650	18.1%
Scott	263	233	-11.4%
Sharkey	13	0	-100.0%
Simpson	129	110	-14.7%
Smith	0	0	NA
Stone	93	93	none
Sunflower	212	235	10.8%
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	82	82	none
Tishomingo	151	151	none
Tunica	6,348	6,348	none
Union	248	248	none
Walthall	30	30	none
Warren	1,855	1,896	2.2%
Washington	1,170	1,291	10.3%
Wayne	174	136	-21.8%

APPENDIX G (CONTINUED)

Webster	10	10	none
Wilkinson	0	0	NA
Winston	221	213	-3.6%
Yalobusha	20	20	none
Yazoo	139	139	none
Total	45,774	51,087	11.6%

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2007 and January 2008, 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 FY2006 and FY2007 updates, reflecting all hotel/motel properties in Smith Travel Research's Mississippi database. Some counties reflected a slight decline in their hotel/motel room inventory due to eliminating a few rooms to "make room" for other amenities such as business and fitness centers.

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

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Hendersonville, Tennessee, 2007.

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, 2007.