

Fiscal Year 2006 Economic Impact

For

Tourism In Mississippi

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INTRODUCTION

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

Tourism's visibility throughout Mississippi is at an all-time high. Fifty-two local entities with a Room and/or Restaurant Tax were in place as of February 2007. They comprise Chambers of Commerce, Convention and Visitor Bureaus (CVBs), Tourism Councils, Economic Development Offices, Commissions, Cities, Counties and City/County Partnerships.

Travel and Tourism, a \$654 billion industry in terms of direct domestic and international expenditures with 7.5 million direct jobs (5.6 % of U.S. nonfarm employment), per the Travel Industry Association, is a vital part of Mississippi's economic development engine. Tourism's emergence throughout Mississippi has brought respect and attention to this industry.

This report's purpose is to estimate Tourism's economic impact at the state and county level for FY 2006. Tourism is vital to Mississippi's economy, based on these **estimates**:

- Tourism accounted for 75,200 direct jobs in FY 2006, based on quarterly employment figures, an 18 % decrease versus FY 2005. Approximately 73,846 of these FY 2006 jobs, or 98.2 %, were private sector ones. The 75,200 direct jobs were 6.7 %, or 1/15, of the total statewide establishment-based employment in FY 2006.
- Tourism accounted for 28,685 indirect/induced jobs in FY 2006. Thus, the total FY 2006 Tourism employment (direct plus indirect plus induced) was 103,885.
- FY 2006 Tourism annual payroll for the 75,200 direct jobs was \$1.4 billion, a 16 % decrease from the \$1.67 billion annual payroll in FY 2005. The indirect/induced labor income was about \$640 million. Thus, the total labor income (direct payroll plus indirect/induced labor income) was about \$2 billion or - 15.3 % versus FY 2005 levels.

- The Tourism Industry ranked 6th in total estimated FY 2006 direct employment, based on **all** sectors of Mississippi's economy.
- FY 2006 Tourism expenditures of \$5.2 billion, an 18 % decrease from FY 2005.
- Tourism's proportion of Mississippi's FY 2006 General Fund—\$324.4 million of the \$4.26 billion General Fund—was 7.6 %, or \$1 of every \$13. The \$324.4 million was a 13.7 % decrease from the \$376 million in FY 2005 Tourism General Fund revenues.
- Tourism's estimated portion of the Gross State Product (GSP) was \$3.8 billion, or 5 % in FY 2005 (1/20 of the state's economy), and \$3.2 billion, or 4 % in FY 2006 (1/25).
- Estimated FY 2006 Tourism Capital Investment (TCI)—focusing on new/renovated contract construction costs—were \$551.2 million, a 7.4 % increase over FY 2005. About \$182 million, or one-third of this TCI total, were attributed to state-licensed casinos.
- FY 2006 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 \$130 million, a 16.2 % decrease from FY 2005.
- Estimated FY 2006 Tourism state taxes collected were \$377.5 million, a 21.2 % decrease versus FY 2005. State-licensed casino taxes accounted for 34.8 % of the state taxes collected and a portion (1/5) are diverted. Gasoline taxes are included in Tourism state taxes collected, but not in the Tourism General Fund revenues since they are diverted.
- The FY 2006 portion of state sales tax (18.5 % of the 7 %) returned to cities attributed to Tourism was \$36 million, a 12.9 % decrease compared to FY 2005 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 \$12 in FY 2005 and \$10.40 in FY 2006, a 13.3 % decrease.

- The number of statewide hotel/motel rooms decreased from 55,079 on June 30, 2005, to 46,326 on June 30, 2006, or -15.9 %. Statewide hotels/motels decreased from 633 as of June 30, 2005, to 585 as of June 30, 2006, or -7.6 %.
- Mississippi's estimated 20.8 million total visitors in FY 2006 included 19.7 million domestic visitors (person-trips)—sum of overnight leisure plus leisure day-trip plus overnight/day business travelers plus combined business/leisure travelers—an additional 910,000 group tour visitors, plus an estimated 170,000 – 180,000 international visitors.
- An estimated 9.9 million domestic overnight leisure visitors in FY 2006 were 14.2 % fewer than the 11.5 million domestic overnight leisure visitors in FY 2005. These exclude day leisure, group tour, business travelers, and international visitors.
- About 7.2 million, or 73 % of the FY 2006 domestic overnight leisure visitors to Mississippi in FY 2006, were from out-of-state, or "Tourism Exports". This excludes day leisure, group tour, business travelers and international visitors.
- An estimated 81 % of all FY 2006 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 a 14.5 % decrease from the FY 2005 level of \$1.17 billion.
- State Parks visitation for FY 2006 totaled 2,255,713, a 23.3 % decrease versus 2,941,988, recorded in FY 2005.

The estimated FY 2006 Tourism direct sales, General Fund Tourism revenues, State tax revenues, City/County Tourism tax revenues and ROI figures cited on pages 5 - 7 include leisure dollars from in-state and out-of-state Mississippi tourists/visitors. They reflect some expenditures by out-of-state volunteers and work crews, but not by post-Katrina "refugees".

METHODS

The purpose of this report was to estimate Tourism's FY 2006 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 reflects that period. Most of Mississippi's Convention and Visitor Bureaus are on an October-September FY as well, but the State Tax Commission compiles tax revenue information for these entities on a monthly and state FY basis. The State Tax Commission provided most of the statewide and county revenue figures. They facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation and attractions/entertainment/recreation information through computer printouts.

Food and beverage components included restaurants (non-alcohol and alcohol serving); quick stop groceries, a.k.a. convenience, specialty food-related, and grocery stores; concessions quick food and bar and beer parlors. Lodging information was gleaned from hotels/motels, campgrounds and bed and breakfasts. Retail establishments comprised department and general merchandise stores, used merchandise stores, clothing and shoe stores, sporting goods stores, 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 DWFP provided hunting/fishing licensing fees and state park jobs/revenues. Officials representing the Natchez National Historical Park and the Vicksburg National Military Park supplemented this information at the federal level. The Vicksburg headquarters and Columbus office of the U.S. Army Corps of Engineers furnished FY 2006 federal park revenue and employment data. MDA/Tourism Division did an FY 2006 Outdoor Recreation survey—outfitters, campgrounds, and other entities participated.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the MDES, LMI Department, through monthly averages by NAICS code from July 2005 - June 2006. FY 2006 Gaming jobs and payroll data were secured from the MGC quarterly surveys.

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

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

Tourism's Broader View and Economic Development are on pages 25 - 29. 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

Restaurant, Gaming (state-licensed) and Lodging jobs were the top three in terms of direct Tourism Employment, in Mississippi, based on Appendix A. Total estimated nongaming jobs were 73.4 % of all FY 2006 Tourism Employment. The 20,019 state-licensed casino gaming jobs, excluding casino hotels, represented 26.7 % of direct Tourism Employment. When state-licensed casino hotel employment totals (3,253) are added to the casinos, their combined total is 23,272, or 31 % of all FY 2006 direct Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY 2005/2006. The narrative section on page 27 summarizes data on indirect/induced jobs. Appendix B shows FY 2005/2006 payroll-related information by employment component. The indirect/induced labor income multipliers are presented on page 27.

Estimated Tourism expenditures were \$6.35 billion in FY 2005 and \$5.2 billion in FY 2006, per Appendix C. FY 2005/FY 2006 estimated General Fund revenues are in Appendix D. These estimated revenues totaled \$376 million in FY 2005 and \$324.4 million in FY 2006. Tourism's \$324.4 million portion of the FY 2006 General Fund was 7.6 %. It includes the estimated Tourism-related portion from construction activity, as well as Personal Income, Sales Tax and all other taxes.

Appendices E and F, respectively, have estimated FY 2005/2006 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 FY 2005/2006 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 FY 2005 and FY 2006.

Welcome Center Registration Data

Travel party registrants provide the Welcome Centers with trip-related information. Welcome Center registrants comprised about four-fifths of the persons serviced in FY 2006, with 2,005,849 registrants out of 2,551,894 persons serviced. Most Welcome Center registrants are U.S. residents. International travelers, in FY 2006, comprised 41,660, or 2.1 % of the 2,005,849 registrants. This proportion was 2.4 % in FY 2005 based on 56,224 international registrants.

U.S. registrants decreased by 12.3 % between FY 2005 and FY 2006; the international component decreased by 25.9 %; and total registrants decreased by 12.7 %, per Table 1. Louisiana, Mississippi, Alabama, Texas, Florida and Georgia held the top six spots in FY 2005/FY 2006, per Tables 2/3. Canada had the most international registrants—36.4 % market share in FY 2005 and 35.2 % market share in FY 2006, 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 13th year of operation in June 2006 with \$571,517 in revenue, 6,227 reservations and 9,830 room nights booked.

Regional Airport/Air Passenger Data

Mississippi's Regional/International Airports reported 1,215,268 enplanements in FY 2006, a 1.8 % increase over FY 2005. 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 748,156 passengers (October 2005 - September 2006), or 61.6 % 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. Jackson-Evers reported some \$25 million in capital improvement projects during FY 2006. The Jackson-Evers

International Airport is a vital cog for the state's air traffic activity.

Gulfport-Biloxi's International Airport reported 352,411 enplanements in FY 2006 (July 2005 - June 2006), but activity picked up the 2nd half of 2006 with 99,206 enplanements in July - September 2006 and 105,067 enplanements from October - December 2006. This momentum continues. Five carriers—Air Tran, ASA/Delta, American, Continental and Northwest—serve it.

FY 2006 charter flights at Regional Airports included: Golden Triangle—27 charter flights/1,765 passengers; Hattiesburg-Laurel—18 charter flights/181 passengers; Tupelo—20 charter flights/650 passengers; and Mid-Delta—1 charter flight/120 passengers.

The Tunica County Airport had 3,616 scheduled enplanements and 12,610 charter enplanements in FY 2006. Their 178 charter flights FY 2006 comprised airports throughout the U.S.—Akron; Bristol; Charlotte; Columbia; Indianapolis; Orlando; Jacksonville; New Orleans; Richmond; among others. Nearly \$2.8 million in estimated net capital expenditures and improvements were made to the Tunica County Airport in FY 2006.

Ad Effectiveness Studies, FY 2005/FY 2006 (Source: TNS, July 2006)

These studies survey households outside of, but within a 750-mile radius of Mississippi. Some goals are to identify the proportion of households that are aware of the state's advertising, measure the incremental travel that could be attributed to the MDA/Tourism Division's advertising campaign via Return on Investment (ROI) and evaluate trip satisfaction. The estimated FY 2006 ROI was \$10, based on the Tourism General Fund revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's domestic consumer and ad placement costs. For FY 2005, the corresponding ROI was \$12. Domestic consumer advertising, in FY 2006, contributed an estimated \$21 million, or 6.5 %, to Tourism's \$324.4 million portion of Mississippi's General Fund. This is just as significant as the estimated ROI.

Other tools measured include advertising awareness, intent to visit a destination, image ratings and commitment. FY 2006 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, FY 2006 (Source: TNS, September 2006)

Some 20.6 million domestic visitors (person-trips)—all leisure plus all business plus all group travel—overnighted in or did a day trip to Mississippi in FY 2006. This does not include volunteers or construction workers on Mississippi's Gulf Coast, an estimated 170,000 –180,000 international visitors, nor some of the “passing through” segment. It does include an estimated 910,000 group travelers, in addition to 19.7 million domestic visitors. Of these 19.7 million, about 80 % were leisure travelers; 14 % were business only; and 6 % both business/leisure. Domestic overnight leisure person-trips totaled nearly 9.9 million, or 65 % of all leisure person-trips. The 9.9 million was a 14.2 % decrease from the FY 2005 estimate of 11.5 million domestic overnight leisure person-trips. About 73 % of the overnight leisure person-trips were from out-of-state. And 81 % of all overnight leisure visitors came from 10 states—Mississippi, Louisiana, Alabama, Texas, Florida, Tennessee, Georgia, Arkansas, Illinois and Missouri. The top five origin Designated Market Areas (DMAs) were Jackson (Mississippi), Memphis, Columbus-Tupelo-West Point, New Orleans, and Hattiesburg-Laurel.

Median annual household income for all Mississippi visitors was \$52,800 (½ were above and ½ were below this level.) Their average age was 47. Average travel party size was three (3) persons. About 39 % (2/5) traveled in pairs. Another 29 % (3/10) traveled with children. The average number of children—for those traveling with children—was 1.9. Only 6 % of all visitors arrived by air, with a higher proportion of business travelers than leisure travelers. Some 58 % of all visitors stayed in paid accommodations. On average, they spent 3.3 nights in Mississippi, based on 2.7 nights for leisure and 5.2 nights for business travelers. The 2.7 nights for overnight leisure was an improvement over the 2.3 nights by this segment in FY 2005.

Vacation activity niche characteristics varied by interest—culturally interested visitors (historic sites/churches, museums, mansions) tend to be older, while “high brow” (musical theater, symphony-opera-concert) are younger and most ethnically diverse segment. Golfers spend twice as much as the next segment (casino gamers), and travel further. The “soft adventurers” (bird watching, camping, eco-tours) are a bit older, but have lower annual household income than the “hard adventurers” (rafting/kayaking, hanggliding/sky diving).

TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY 2005 AND FY 2006

Origin	FY 2005	FY 2006	Percentage Change
States	2,240,581	1,964,189	-12.3
Countries	56,224	41,660	-25.9
Total	2,296,805	2,005,849	-12.7

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

SOURCE: MDA/Tourism Division, 2006.

TABLE 2
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY 2005

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

SOURCE: MDA/Tourism Division, 2005.

TABLE 3
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN STATES, FY 2006

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	7.8
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	2.8
Other	372,199	19.0	NA
Total	1,964,189	100.0	100.0

SOURCE: MDA/Tourism Division, 2006.

TABLE 4
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY 2005

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

SOURCE: MDA/Tourism Division, 2005.

TABLE 5
HIGHWAY WELCOME CENTER REGISTRANTS
TOP TEN COUNTRIES, FY 2006

State	Registrants	Percentage of States	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.

GAMING

Mississippi had 22 state-licensed casinos as of June 30, 2006 versus 29 state-licensed casinos at the start of FY 2006, or –24.1 %. There were 27 state-licensed casinos as of 2/1/2007.

Gaming Revenues

Total state-licensed casino gross gaming revenues were \$2.24 billion in FY 2006, with about \$1.62 billion of this total, or 72.4 %, were estimated “net” tourist/visitor revenues. This tourist/visitor portion comprised 31.1 % of the \$5.2 billion statewide Tourism expenditures.

Mississippi’s total gaming-related tax revenues were \$273.55 million in FY 2006, with \$181.7 million in state receipts and \$91.85 million earmarked for cities/counties. Tourism accounted for an estimated \$131.5 million of the \$181.7 million in state receipts and \$67.4 million of the \$93.1 million in city/county gaming tax revenues. About \$145.7 million, or 80 % of the \$181.7 million in gross gaming state tax receipts, went into the General Fund; the other \$36 million, or one-fifth, was diverted to MDOT. Tourism’s estimated proportion of the \$145.7 million in General Fund gaming dollars was \$105.5 million, or 72.4 %. The \$105.4 million comprised 32.5 %, or 1/3, of Tourism’s \$324.4 million contribution to the state’s General Fund.

FY 2005/2006 state-licensed casino gross gaming revenue market share by Gaming Region—North and South River and Coastal—comprises Table 6. Table 7 includes the percentage change in gross gaming revenue by Regions between FY 2005/2006.

Mississippi Gaming Commission Quarterly Survey Trends

About 73 % of all FY 2006 statewide patrons were from out-of-state; e.g., Alabama, Arkansas, Florida, Georgia, Louisiana, Oklahoma, Illinois, Tennessee and Texas, per Mississippi Gaming Commission data. Coahoma and Tunica County casinos in the North River Region had 86 % of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Missouri, Oklahoma,

Alabama, and Georgia patrons. About 39 % of the South River Region—Greenville, Natchez and Vicksburg—casino patrons were from out-of-state; e.g., Arkansas and Louisiana, while 64 % of Coastal Region casino patrons were from out-of-state. Alabama, Florida, Louisiana, and Georgia were the top four states for out-of-state Coastal Region casino patrons.

Twenty-two state-licensed casinos contributed to the local and state economy through an FY 2006 payroll of \$620 million, including some July-August 2005 data for Coastal Region casinos. The FY 2006 advertising/promotional expenditures attributed to the state-licensed casinos were \$71.5 million. Casino patrons stayed in casino hotels in three gaming regions, per Tables 8/9. The casino hotel rooms in Tables 8/9 are based on FY 2005/2006 quarterly averages.

An estimated \$182 million in Tourism Capital Investment (TCI) for facilities and other items were attributed to the state-licensed casinos and/or new development in FY 2006, or 33 % (one-third) of the statewide TCI. These are investment dollars over and above state-licensed casino employment, tax revenues, etc. They do not include land acquisition/gaming equipment.

Gaming Employment

FY 2006 quarterly casino employment figures came from the Mississippi Gaming Commission via their quarterly surveys. FY 2006 figures reflect 20,019 state-licensed casino employees and 3,253 persons employed at state-licensed casino hotels. These combined 23,272 jobs (casinos plus casino hotels) were 31 % of all statewide direct Tourism jobs.

NonGaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$164.8 million in FY 2006, while food and beverage revenue accounted for \$265.7 million, based on MGC data. The combined room plus food and beverage revenue at state-licensed casinos is significant. FY 2006 retail sales at all state-licensed casinos was about \$55.6 million. All these dollar amounts are gross sales.

TABLE 6
GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2005 AND FY 2006

Region	FY 2005 Gross Gaming Revenue	Percentage of FY 2005 Total	FY 2006 Gross Gaming Revenue	Percentage of FY 2006 Total
Coastal	\$1,252,219,864	44.8	\$594,828,791	26.6
North River	1,191,290,996	42.7	1,254,661,991	56.0
South River	350,000,000	12.5	390,283,553	17.4
Total	\$2,793,510,860	100.0	\$2,239,774,335	100.0

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2006.

TABLE 7
GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY 2005 AND FY 2006

Region	FY 2005 Gross Gaming Revenue	FY 2006 Gross Gaming Revenue	Percentage Change
Coastal	\$1,252,219,864	\$594,828,791	-52.5
North River	1,191,290,996	1,254,661,991	5.3
South River	350,000,000	390,283,553	11.5
Total	\$2,793,510,860	\$2,239,774,335	-19.8

NOTE: Table 6 and Table 7 reflect Gaming Revenue Region shares. Coastal revenues are for cities in Hancock and Harrison counties. North River revenues reflect 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, 2006.

TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2005

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

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

TABLE 9
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2006

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	13	6,017	85.2	57.56	49.04
South River	8	811	73.5	62.76	46.13
Total/Average	25	8,653	85.1	\$65.56	\$55.79

FY 2006 Coastal Region data do not reflect July – September 2005 quarterly averages since the data were not available.

* 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 complimentary or “comped,” but it appears that much fewer rooms were comped in FY 2006, versus FY 2005.

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

INTERNATIONAL TRAVEL

This section highlights some International Travel items for FY 2005/2006. MDA/Tourism Division began tracking International Travel to Mississippi in CY 2001 via specific surveys at certain attractions. The following information is separate from the number of International Welcome Center Registrants.

FY 2005 and FY 2006 Visitor Sample

FY 2006 target markets were determined for 16 countries where the MDA/Tourism Division has marketing activities, e.g., England, Scotland, Ireland, Holland, France, Denmark, Belgium, Switzerland, Sweden, Norway, Austria, Germany, Japan, Australia, Canada, and Mexico. 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 FY 2005/2006 in terms of target market countries.

The number of international visitors to surveyed attractions increased by 9.8 % from FY 2005 to FY 2006, 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. A November 2006 Internet survey of 965 Canadians (with some flaws), under the 12-state Travel South USA umbrella, indicated that Mississippi ranked 3rd—behind Florida and Arkansas—in nights stayed, based on 9.1 nights. Results were based on a full 12-month cycle of 12 states/12 months of sweepstakes. Those Canadian travel parties who vacationed in Mississippi did so around March – April 2006.

TABLE 10
**TOP TARGET MARKETS FOR INTERNATIONAL
VISITOR ATTRACTIONS, FY 2005 AND FY 2006**

Country	FY 2005 Market Total	Target Percent FY 2005 Total	Country	FY 2006 Market Total	Target Percent FY 2006 Total
England	4,806	41.5	England	5,554	43.5
Canada	2,354	20.3	Canada	1,937	15.2
Germany	1,141	9.9	Germany	1,031	8.1
Holland	582	5.0	Holland	721	5.6
Australia	412	3.6	Scotland	662	5.2
Ireland	376	3.2	Ireland	633	5.0
Scotland	354	3.1	Australia	550	4.3
Sweden	293	2.5	Sweden	432	3.4
Japan	250	2.2	France	275	2.2
France	234	2.0	Japan	209	1.6
Belgium	179	1.5	Norway	175	1.4
Switzerland	146	1.3	Belgium	148	1.1
Norway	141	1.2	Denmark	146	1.1
Austria	122	1.1	Mexico	122	1.0
Mexico	85	0.7	Switzerland	117	0.9
Denmark	54	0.5	Austria	50	0.4
Wales	52	0.4			
Sub-Total	11,581	100.0	Sub-Total	12,762	100.0
Other	1,022	NA	Other	1,076	NA
Total	12,603	100.0	Total	13,838	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 FY 2006 International visitors to Mississippi is 170,000 – 180,000.

SOURCE: MDA/Tourism Division, 2006.

OUTDOOR RECREATION

This section highlights the Mississippi DWFP and Federal data. Employment, payroll and revenue figures for the U.S. Army Corps of Engineers, Vicksburg's National Military Park and Natchez's National Historical Park are in Appendices A, B and C. A separate survey was administered to outfitters, campgrounds, among other outdoor entities.

Mississippi Department of Wildlife, Fisheries and Parks (DWFP)

DWFP nonresident (tourists/visitors) revenues, based on licenses issued and total sales for all game hunting, 7-day all game hunting, archery-primitive weapon, small game hunting, freshwater fishing, among other nonresident fishing and hunting activities, were \$8,027,191 in FY 2006. The number of FY 2006 nonresident fishing and hunting licenses totaled 134,764.

Mississippi's 24 State Parks had 233 cabins, 48 motel rooms and 1,690 campsites on 23,904 acres in FY 2006. Table 11 lists FY 2005/2006 park visitation. Their FY 2005/2006 employment figures are in Appendix A, with payroll data in Appendix B. Appendix C has estimated FY 2005/2006 Tourism revenues from nonresident licenses and entrance fees.

Selected Federal Park and Recreation Areas

Vicksburg's National Military Park reported 533,463 FY 2006 visitors, an 8.8 % decrease from FY 2005. A significant proportion are from out-of-state and various countries. The Natchez National Historical Park accounted for 232,023 visitors in FY 2006, a 19.8 % increase versus FY 2005. Their FY 2006 sales/fee collections are in Appendix C.

Vicksburg's District Office of the U.S. Army Corps of Engineers reported 5,497,275 FY 2006 combined visits at Arkabutla, Enid, Grenada and Sardis Lakes, an 8.4 % increase over FY 2005. Each visit, on average, lasted 5.3 hours. Columbus's Office of the U.S. Army Corps of Engineers cited 2.8 million FY 2006 total visits along the Tennessee-Tombigbee Waterway.

TABLE 11
STATE PARK VISITATION, FY 2005 AND FY 2006

Park	FY 2005 Visits	FY 2006 Visits	Percentage Change
Buccaneer	544,812	76,784	-85.9
Casey Jones	80	NA	NA
Clark Creek	17,592	16,972	-3.5
Clarkco	114,436	110,348	-3.6
Floewood	4,088	NA	NA
George P. Cossar	105,304	104,328	-0.9
Golden Memorial	4,288	2,560	-40.3
Great River Road	50,256	59,072	17.5
Holmes County	69,804	54,632	-21.7
Hugh White	161,398	155,136	-3.9
J.P. Coleman	42,860	78,192	82.4
John W. Kyle	115,480	137,352	18.9
Lake Lincoln	96,839	69,094	-28.7
Lake Lowndes	203,920	180,352	-11.6
LeFleur's Bluff	271,640	340,992	25.5
Legion	87,756	53,314	-39.2
Leroy Percy	32,584	32,305	-0.9
Nanah Waiya	4,968	NA	NA
Natchez	37,908	39,456	4.1
Paul B. Johnson	309,936	182,984	-41.0
Percy Quin	96,839	46,500	-52.0
Roosevelt	173,800	163,124	-6.1
Shepard	29,072	7,504	-74.2
Tishomingo	105,028	112,592	7.2
Tombigbee	50,152	44,792	-10.7
Trace	113,024	94,020	-16.8
Wall Doxey	98,124	93,308	-4.9
Total	2,941,988	2,255,713	-23.3

NOTE: There were 24 state parks during FY 2006.

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2006.

TOURISM'S BROADER VIEW AND ECONOMIC DEVELOPMENT

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

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

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

Mississippi's GSP was \$77 billion in CY 2004 and \$81 billion in CY 2005. About ¼ 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 estimated portion, or Total Value Added of Mississippi's GSP, was \$3.8 billion, or 5 %, in FY 2005, and \$3.2 billion, or 4 % in FY 2006. Tourism's 4 % GSP is lower than Tourism's Employment concentration of 6.7 % and Tourism's proportion of the General Fund Revenues (7.6 %). And comparing Total Value Added to expenditures shows that 55 cents out of each Tourist Dollar spent, including Tourism Capital Investment, stays in Mississippi.

Food services and drinking places, lodging, gasoline stations, recreation, other retail businesses and some contract construction, maintenance and repair work, government and transportation were part of the Tourism Industry GSP. State-Licensed Casino Gaming accounted for 31.7 % of Mississippi's Tourism Industry GSP in FY 2006. Lodging accounted for 11.6 % of the Tourism Industry's GSP; Gasoline Stations for 5.9 %; while TCI made up about 6 %. The Tourism Industry's composite nature needs to be emphasized in this analysis.

Mississippi's economy reflected a FY 2006 unemployment rate of 8.2 %, based on a 12-month average. The state had a civilian labor force of 1,329,400, with an average of 109,400 unemployed persons in FY 2006. Metropolitan Statistical Areas (MSAs) for counties with a significant Tourism industry had these FY 2006 unemployment rates: 14.9 % for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 12.1 % for Pascagoula (Jackson and George counties); 6.2 % for Hattiesburg (Forrest, Lamar and Perry counties); and 6 % 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 13.8 % unemployment rate in FY 2006. Memphis's MSA includes DeSoto and Tunica Counties, but much of their MSA data reflect Tennessee county figures; thus, available unemployment statistics are not comparable.

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. The FY 2005/2006 Employment Multipliers for Mississippi were 1.38. The 91,700 estimated statewide direct FY 2005 Tourism jobs resulted in an additional 34,800 indirect plus induced jobs, while the 75,200 statewide direct Tourism jobs in FY 2006 resulted in an additional 28,885 indirect plus induced jobs. Total FY 2006 jobs associated with Tourism were 103,885. Employment multipliers varied by description—1.36 for lodging, 1.27 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 FY 2005 Labor Income Multiplier was 1.44. Total labor income was \$2.4 billion—\$1.67 billion (direct) and \$739 million (indirect/induced). The FY 2006 Labor Income Multiplier for Mississippi was 1.45. Total labor income was \$2.04 billion: \$1.4 billion (direct) and \$640 million (indirect/induced). IMPLAN codes were used to compute the FY 2005/2006 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 FY 2006 surplus of about \$1 billion, or a 14.5 % decrease from the \$1.17 billion balance in FY 2005. Out-of-state visitors spent an estimated \$4.2 billion in Mississippi, or 81 % of the \$5.2 billion spent by tourists/visitors in FY 2006. Mississippians spent about \$3.2 billion traveling out-of-state. And Mississippians traveling within their state—at least 50 miles or more, one-way—spent an estimated \$1 billion on their FY 2006 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 \$86 million in Tourism-related personal income tax, sales tax and all other taxes went to the General Fund in FY 2005, plus another \$14.4 million from the estimated Tourism-related construction activity tax. An estimated \$73.2 million in Tourism-related personal income tax, sales tax and all other taxes were FY 2006 General Fund additions, or -14.9 % versus FY 2005. The estimated FY 2006 Tourism-related construction activity tax monies in the General Fund were \$13.4 million, or -8 % versus FY 2005. This factors in post-Katrina tax breaks for certain types of businesses throughout portions of the state, since Tourism Capital Investment activity increased.

Employment Rankings

The Tourism Industry ranked 6th in total estimated FY 2006 direct employment, behind Government, Manufacturing, Wholesale/Retail Trade, Health Care & Social Assistance, and Professional & Business Services. Most of the direct FY 2006 Tourism jobs—an estimated 73,846 of the 75,200 statewide direct Tourism jobs or 98.2 %—were private sector ones (hotels/motels, restaurants, casinos...). The other 1.8 % 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 75,200 statewide direct Tourism jobs equaled 6.7 %, or 1/15, of the state's establishment-based nonfarm jobs, per Appendix F. In FY 2005, the 91,700 statewide direct Tourism jobs were 8.2 % of all jobs, per Appendix E. The state's nonfarm employment rankings reflect sectors and super sectors, per their definition on page 42. Table 12 presents Mississippi's FY 2006 nonfarm, establishment-based employment rankings by the top sectors/super sectors.

TABLE 12
**MISSISSIPPI NONFARM ESTABLISHMENT-BASED
EMPLOYMENT RANKINGS,
TOP SECTORS/SUPER SECTORS, FY 2006**

Sector	FY 2006 Establishment Based Employment	FY 2006 Employment Percentage	FY 2006 Rank
Government (1)	240,296	21.3	1
Manufacturing (2)	176,042	15.6	2
Wholesale/Retail Trade (3)	167,429	14.8	3
Educational & Health Services (4)	121,633	10.8	4
Professional & Business Services (5)	88,885	7.9	5
Tourism (6)	75,200	6.7	6
Leisure & Hospitality (7)	58,271	5.1	7
Construction (8)	51,355	4.5	8
Transportation & Warehousing/Utilities (9)	46,224	4.1	9
Financial Activities	46,092	4.1	10
Other Services (10)	36,256	3.2	11
Information	14,008	1.2	12
Other (11)	8,717	0.7	NA
Total Employment	1,130,408	100.0	NA

1. Excludes an estimated 1,354 full-time equivalent Tourism jobs funded by public monies—State Tourism Office, Regional/International Airports, Museums, etc. It includes all public sector employment—Health Care, Education, etc.
2. Durable goods comprised 115,658 jobs, or 65.7 % of Manufacturing jobs.
3. Retail Trade was the dominant component with 132,337 non-Tourism jobs. Does not include an estimated 8,230 Tourism jobs directly related to Retail Trade.
4. Health Care & Social Assistance was the dominant component with 105,675 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 42. Those jobs not directly related to Tourism are included in the Leisure & Hospitality Super Sector.
Appendix A includes a breakdown of the FY 2006 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, Taxi Service, and Travel Arrangement/Reservations.
11. Natural Resources & Mining.

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, 2006.

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 on 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 FY 2004. This enabled our Unit to monitor an important revenue source for municipalities, plus estimate their Tourism-related portion.

FY 2005 computations were made for 210 municipalities. An estimated \$41.4 million allocated to municipalities from FY 2005 state sales taxes were attributed to Tourism. FY 2006 data were computed for the state's nearly 300 municipalities, with an estimated \$36 million, allocated locally from FY 2006 state sales taxes, attributed to Tourism, -12.9 % versus FY 2005.

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 to 5 %. Table 13 presents these tax percentages by jurisdiction, plus FY 2006 gross Tourism special tax revenue. About \$31.9 million, or 2/3, of the gross FY 2006 special tax revenues were from restaurant sales with \$16.4

million, or 1/3, from lodging sales. Special tax revenues totaled \$48.3 million. McComb, Pascagoula, Pearl and Pontotoc received special tax revenues for the first time in FY 2006.

County Tourism Expenditures/Employment and Hotel/Motel Room Data

Estimated FY 2005/2006 Tourism expenditures and employment data for the state's 82 counties, estimated Tourism employment percentage, and other indicators such as Tourism Capital Investment 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 585 total hotel/motel properties as of June 30, 2006, were -7.1 % compared to the 630 total hotel/motel properties as of June 30, 2005, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms decreased from a 55,079 as of June 30, 2005, to 46,326 as of June 30, 2006, or -15.9 %, per Appendix G. It's estimated that 4,508 new statewide hotel/motel rooms were under construction between July-August 2006, or 9.7 % above June 2005 inventory levels.

Mississippi had an estimated 147 Bed & Breakfasts (B & B's) as of June 30, 2006, with 717 total B & B rooms, 686 cabin rooms, 384 condo/timeshare rooms and 10,053 recreational vehicle (RV) spaces with electricity and water, per the FY 2006 MDA/Tourism Division survey.

Mississippi's statewide estimated room availability, including summer 2006 construction projects, was 52,621 rooms. This included 46,326 hotel/motel rooms in place; 4,508 hotel/rooms under construction; 717 B & B rooms; 686 cabin rooms; and 384 condo/time share rooms.

The Mississippi Gulf Coast, as of December 2006, had about 10,000 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 2006, was \$69.10. Mississippi's estimated 12-month statewide occupancy percent was about 68.9 using STR. These STR indicators primarily include corporate and franchise properties, but not the state-licensed casino hotels, whose occupancy percent (85.1) were much higher than the STR statewide figures, per Table 9. State-licensed casino hotel rooms accounted for nearly 1/5 of all statewide hotel/motel rooms in FY 2006.

Tourism Office Advertising and Employment/Payroll Mini-Surveys, FY 2006

Our 51 Tourism Partners—CVB's, Tourism Commissions, Chambers, etc.—received FY 2006 Advertising and Employment/Payroll mini-surveys for the October 2005 – September 2006 time frame. Twenty-two responded to the Advertising survey and 25 to the Employment one. Most of the CVB's—about 4/5—responded; a lesser portion of the non-CVB's did so.

FY 2006 Tourism Employment/Payroll data reflected 108 full-time equivalent staff with a \$3.65 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.

The Advertising-related survey responses indicated that respondents—as a “group”—spent: \$658,315 in Ad Agency fees; some \$3.8 million in Ad Placement costs; another \$380,000 in Ad Production costs; \$186,013 for Promotional items; \$248,379 for Trade Show Participation costs; \$49,641 for FAM Tours; \$503,194 for Billboard Advertising; \$406,490 for Brochure and Collateral Printing; \$32,849 in Other Printing; \$670,195 in Sponsorships; \$167,388 for web site maintenance; \$444,051 in State Matching Grant funds; and \$75,000 from other Grant Programs.

Some \$7.6 million were spent by the respondents for the various line items in the prior paragraph, with \$3.8 million of this amount, or 1/2, 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 May 23, 2006, Governor Haley Barbour, along with federal, state, and local officials, and Mississippi and national filmmakers broke ground for the Mississippi Film Centre, the central facility in the Mississippi Film Enterprise Zone and cornerstone of the Mississippi film industry for years to come. The workforce training facility and sound stage complex will be completed in early 2007. Combined with the Mississippi Motion Picture Incentive Program, Mississippi has taken two giant steps forward as a Southern production center, seeking both to attract out-of-state production and to develop Mississippi filmmaking.

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

In FY 2006, the **Mississippi Film Office** coordinated the activities of more than a dozen productions, including film, documentaries, music videos, short films, and commercials. While each project created direct economic impact and jobs for Mississippi, paychecks for Mississippi actors and crew were only part of the economic benefit. Hotels, restaurants and grocery stores, along with expenditures for building materials, production office expenses, vehicle and equipment rentals, props and set dressing, wardrobe/make-up, and location fees all add to the total impact of filming on location. Every corner of the state saw production activity.

The Mississippi Film Office again sponsored the Magnolia Independent Film Festival (Starkville), the 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 inaugural Ocean Springs Film Festival and the Southern Circuit Film Series at Millsaps College. Incentive grants were given to Mississippians for the development of film projects, to communities for the support of film festivals (Oxford, Natchez, Columbus, Jackson, Tupelo, Ocean Springs) and to film programs (Crossroads Film Society, Mississippi Film and Video Alliance) in support of Mississippi filmmakers and audiences.

Selected State Agencies with Tourism Links: FY 2006 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. FY 2006 (state) Government Expenditures were \$20.5 million.

The MAC reported \$563,833 in contractual services, and \$1.14 million in subsidies, loans and grants. This is separate from the \$1.78 million (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 \$1.25 million for contractual and \$161,030 for subsidies, loans and grants. Pearl River Valley Water Supply District's budget reflected \$2.33 million for contractual, plus \$787,000 in subsidies, loans and grants. Mississippi's Museum of Natural Sciences indicated \$741,995 for pertinent categories—contractual, plus subsidies, loans and grants. MDA/Tourism Division budgeted \$6.462 million for contracts, grants and other projects while MDOT spent \$4.36 million to maintain Welcome Centers and Rest Areas, including contract and routine expenses. MDOT funded a National Scenic Byway Grant of \$218,433 for the Natchez Trace Parkway, plus \$25,000 for the Great River Road Corridor Management Plan.

TABLE 13
**ROOM/RESTAURANT GROSS SPECIAL
TAX REVENUES BY TOURISM OFFICE, FY 2006**

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2006 Room Tax Revenue	Gross FY 2006 Restaurant Tax Revenue	Gross FY 2006 Total Tax Revenues
Aberdeen	1.0	1.0	\$13,059	\$61,722	\$74,781
Batesville	3.0	3.0	119,078	622,579	741,657
Bay Springs	3.0	None	7,673	None	7,673
Canton	2.0	2.0	92,939	409,492	502,431
Cleveland	2.0	2.0	95,687	496,040	591,727
Clinton	2.0	None	111,369	None	111,369
Coahoma County	2.0	1.0	71,323	226,891	298,214
Columbus-Lowndes	2.0	2.0	221,193	1,161,627	1,382,820
Corinth	2.0	2.0	78,084	756,313	834,397
DeSoto County	2.0	2.0	623,932	3,973,060	4,596,992
Florence	None	2.0	None	127,427	127,427
Flowood	None	2.0	None	1,189,012	1,189,012
Greenwood	1.0	1.0	69,411	300,498	369,909
Grenada	2.0	1.0	114,173	273,378	387,551
Hancock County	2.0	None	64,152	None	64,152
Harrison County	5.0	None	5,173,599	None	5,173,599
Hattiesburg	2.0	2.0	582,848	3,782,238	4,365,086
Hernando	1.0	None	9,185	None	9,185
Holly Springs	2.0	2.0	36,880	197,466	234,346
Horn Lake	1.5	None	115,940	None	115,940
Indianola	2.0	2.0	33,157	275,490	308,647
Jackson (city)	4.0	2.0	2,755,469	5,442,757	8,198,226
Kosciusko	2.0	None	30,290	None	30,290
Lauderdale County	2.5	None	595,692	None	595,692
Laurel	2.0	2.0	163,551	1,108,536	1,272,087
Magee	1.0	1.0	21,527	173,547	195,074
McComb*	3.0	None	201,156	None	201,156
Montgomery County	2.0	None	21,246	None	21,246
Moss Point	3.0	None	391,412	None	391,412
Natchez	3.0	1.5	378,733	587,656	966,389

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2006 Room Tax Revenue	Gross FY 2006 Restaurant Tax Revenue	Gross FY 2006 Total Tax Revenues
New Albany	2.0	2.0	\$40,178	\$401,510	\$441,688
Newton	2.0	None	17,412	None	17,412
Ocean Springs	2.0	None	77,807	None	77,807
Oxford	2.0	2.0	168,826	1,439,572	1,608,398
Pascagoula*	3.0	None	206,848	None	206,848
Pearl#	None	2.0	None	367,987	367,987
Philadelphia	3.0	None	121,477	None	121,477
Picayune	2.0	1.0	62,089	367,233	429,322
Pontotoc@	2.0	2.0	10,740	94,278	105,018
Rankin County	2.0	None	533,621	None	533,621
Richland	None	2.0	None	268,405	268,405
Ridgeland	1.0	1.0	179,203	805,629	984,832
Southaven	1.0	None	111,480	None	111,480
Starkville	2.0	2.0	146,156	1,089,149	1,235,305
Stone County	2.0	2.0	25,174	327,171	352,345
Tishomingo County	2.0	None	21,961	None	21,961
Tunica County	3.0	3.0	1,125,000	1,734,254	2,859,254
Tupelo	2.0	2.0	330,935	2,377,391	2,708,326
Vicksburg	3.0	1.0	670,827	706,309	1,377,136
Washington County	1.0	1.0	79,756	480,674	560,430
West Point	1.0	None	213,808	None	213,808
Yazoo County	2.0	2.0	34,450	255,287	289,737
Total			\$16,370,506	\$31,880,578	\$48,251,084

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

*McComb and Pascagoula began collecting their Lodging Taxes on August 1, 2005, which corresponds to FY 2006.

@ Pontotoc began collecting their local Taxes in December 2005.

#This is a Restaurant Tax District where the Bass Pro Shop and Trustmark Stadium—home to the Mississippi Braves—are located. The Restaurant Tax District was approved by Pearl voters on September 13, 2005, or FY 2006.

SOURCE: Mississippi State Tax Commission, 2006.

Tourism Capital Investment (TCI) FY 2006 Surveys

MDA/Tourism Division's Research Unit, with input from MDA/Regional Services Division, McGraw-Hill Construction/Dodge, Tourism Offices, Chambers of Commerce, state agencies, , among others, updated the FY 2006 TCI data. Appendix E presents the estimated FY 2005 TCI expenditures by county, reflecting new construction and expansion and/or renovation of Tourism-related businesses/projects from antique stores to zoos; the estimated FY 2006 TCI county-by-county expenditures are in Appendix F. These dollar amounts do not reflect announcements nor dollars spent over a multi-year period. They primarily reflect estimated contract construction costs and permit fees, and some site prep costs, but do not include land acquisition costs, nor equipment purchasing costs. Some entities do not 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 FY 2005 was \$513.3 million, based on data secured, and \$551.2 million in FY 2006, or a 7.4 % increase. Some \$334.8 million, or about 60 % of the FY 2006 TCI was from private sources. The other \$216.4 million, or 40 %, comprised public monies, including federal, state, county and city sources. State-licensed casinos, including amenities, accounted for \$182 million in FY 2006 TCI, or 33 % of the \$551.2 million TCI.

The Mississippi Gulf Coast accounted for \$228 million in FY 2006 TCI, or 41.3 % 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 three-to-five years in post-Katrina projects.

Tunica County's estimated \$111.5 million in FY 2006 TCI comprised 20.2 % of the statewide TCI total. Casino-related development, a new retail center, arena renovation, among other amenities, plus Airport-related infrastructure comprised much of Tunica County's TCI.

The Jackson MSA's (Copiah-Hinds-Madison-Rankin-Simpson counties) FY 2006 TCI was \$58.8 million, or about 10.7 % of the \$551.2 million figure. New hotel/motel expansion/renovation projects, retail establishments, plus infrastructure projects (airport and others) and parks were in the mix, coupled with many other completed and on-going projects.

The Hattiesburg area (Forrest/Lamar counties) reflected \$40.9 million in FY 2006 TCI, a 50 % increase over FY 2005 TCI levels. FY 2006 examples included numerous restaurant and retail projects, hotel/motel construction and expansion, state park renovations and various downtown projects. Some golf course projects were part of the mix.

DeSoto County's \$25.9 million in FY 2006 TCI comprised hotels/motels, retail, arena and civic center renovations, plus infrastructure. Oxford plus some Lafayette County non-city TCI was about \$13.1 million. This included some retail, depot renovation, recreation and condos. Tupelo's \$12.8 million for FY 2006 TCI covered lodging, retail, museums, RV parks and infrastructure. Tate County's \$2.6 million in FY 2006 TCI comprised a new convention center, a new restaurant and a new memorial park. Tishomingo County's \$2.2 million in FY 2006 TCI had additional second home and marina development, battlefield renovations, state park repairs and RV sites renovation. Coahoma County's \$1.7 million in FY 2006 TCI comprised casino-related renovations, a new restaurant and Welcome Center renovations.

Meridian/Lauderdale County's \$11.6 million in FY 2006 TCI covered a new hotel, restaurants, among other projects. Greenville/Washington County reflected \$9.6 million for FY 2006 projects such as a new casino and infrastructure renovations. Vicksburg's \$7.1 million in FY 2006 TCI pertained to casino-related projects, a new hotel, plus several historic homes. Natchez reflected approximately \$920,000 in FY 2006 TCI, primarily for retail projects.

Oktibbeha County's \$1.7 million in TCI covered infrastructure, campground, and other projects. Neshoba County's \$1.6 million was for gas station, restaurant, retail and infrastructure projects. Cleveland (retail and other projects); Corinth (retail, theater, trails); Laurel/Jones County (airport, museum, trails); Grenada (golf course/other state park work and gas stations); Louisville/Winston County (infrastructure, state park); Marshall County (various projects); Pike County (hotel/motel renovations, sports park/athletic fields, state park, restaurants); Panola County (art gallery, restaurants); Scott County (retail, state park); Wilkinson County (museum); and Yalobusha County (fish hatchery, recreational trails, state park) were among other counties with FY 2006 TCI. A number of mayors, city building officials, city/county planners, grants coordinators, and others, listed in the Acknowledgments, furnished city-specific TCI data.

McGraw Hill Construction identified new FY 2006 TCI construction and renovations at the county level, as well as some projects in the planning stage. It is anticipated that they will continue to furnish FY 2007 TCI project data. The FY 2007 TCI survey will be done between July - November 2007. This TCI figure will vary in subsequent years, depending on the nature of TCI projects, the thorough scope of the data provided by the various sources, and the completed surveys returned to our office.

Delimitations

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

Limitations

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

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

This study makes use of statewide employment and labor income multipliers from IMPLAN, but not county level multipliers. The IMPLAN data are not from the same year as the FY 2006 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 % of these sales, or another city/county where tourist/visitor restaurant sales may comprise 10 % 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) 2006: July 2005 - June 2006.

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 and 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.

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

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

Mississippi Tourism 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 for a rural state with coastal counties.

Multipliers: The direct impact plus the indirect impact plus the induced impact/the direct impact.

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.

Outliers: For purposes of the FY 2006 Visitor Profile Study, households that participated in multi-household travel such as church/tour groups, construction crews, among others.

Qualified Households: For the FY 2006 Visitor Profile and Ad Effectiveness Studies, qualified households (respondents) will have traveled more than 50 miles from home, but will 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 who traveled 50 plus 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: The gross output of an industry or a sector less its intermediate inputs. In other words, the contribution of an industry or sector to GDP or GSP.

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 and private funding sources during a given fiscal year.

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 from 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 primary home 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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Gulfport-Biloxi International Airport. Monica Maturri, Director of Finance.

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Meridian Airport Authority. Debbie Moulds, Executive Assistant.

Mid-Delta Regional Airport. Frank Cooper, Director.

Tunica County Airport. Cliff Nash, Executive Director.

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Cleveland, City of. John Lindsey, Chief Administrative Officer.

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Tupelo CVB. Pat Rasberry, Assistant Director.
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APPENDICES

Appendix A
ESTIMATED TOURISM EMPLOYMENT
FY 2005 AND FY 2006

CATEGORY	FY 2005	FY 2006	CHANGE
Food Services & Drinking Places (1)	28,975	24,680	-14.8%
Lodging (2)	16,400	14,000	-14.6
Gaming (3)	28,736	20,019	-30.3
Retail Trade (4)	9,670	8,230	-14.9
Support Activities, Air Transportation (5)	1,471	1,433	-2.6
Travel Arrangement/Reservations	455	389	-14.5
Passenger Car Rental	169	187	10.7
Air Passenger, Scheduled & Chartered (5)	258	246	-4.7
Scenic & Sightseeing Transportation	75	53	-29.3
Charter Bus Industry	104	109	4.8
Taxi Service	38	33	-13.2
Sub-Total, Transportation	2,570	2,450	-4.7
Motion Picture Theaters	165	170	3.0
Motion Picture & Video Production	96	76	-20.8
Museums, Historical Sights & Similar (6)	211	177	-16.1
Bowling Centers	77	53	-31.2
Performing Arts, Spectator Sports & Related (6)	202	197	-2.5
Golf Courses & Country Clubs (6)	872	863	-1.0
Marinas	74	75	1.4
Amusement Parks & Arcades	60	56	-6.7
Laundry Services	161	154	-4.3
Advertising & Related Services	163	173	6.1
State Parks, Federal & Private Outdoor Recreation (7)	375	580	54.7
State, City, County Tourism Offices and State Agencies (8)	244	310	27.0
Sub-Total, Other Services/Private and Public Recreation/Entertainment and State/Local/Federal Government	2,700	2,884	6.8
Nonresidential Building Construction	1,407	1,710	21.5
Highway, Street and Bridge Construction	1,242	1,227	-1.2
Sub-Total, Construction	2,649	2,937	10.9
TOTAL	91,700	75,200	-18.0%

Appendix A (continued)

This Appendix Includes:

1. Alcohol/Nonalcohol Restaurants, Drinking Places, among other establishments.
2. Estimates based on Mississippi Department of Employment Security data for Hotels & Motels (NAICS 72111), Other Traveler Accommodations (NAICS 72119) and RV Parks & Recreational Camps (NAICS 7212), some Residential Property Managers (NAICS 531311) plus the state-licensed casino hotel employees.
3. Based on Mississippi Gaming Commission quarterly survey 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; 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.
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 full-time equivalent employment. This category is included in Appendices B and C. Fiscal Year 2006 marked the initial year of 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, and National Forests in Mississippi.
8. Includes the number of Full-Time Equivalent (FTE) 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, 2006.
Mississippi Department of Wildlife, Fisheries & Parks, 2006.
Mississippi Department of Employment Security, LMI Department, 2006.
MDA/Tourism Division, 2006.
Mississippi Gaming Commission, 2006.
Mississippi Museum of Natural Science, 2006 (under Wildlife, Fisheries & Parks).
Mississippi State Tax Commission, 2006.
Pearl River Basin Development District, 2006.
Pearl River Water Supply District, 2006.

Appendix B
ESTIMATED TOURISM PAYROLL
FY 2005 AND FY 2006

CATEGORY	FY 2005 PAYROLL	FY 2006 PAYROLL
Food Services & Drinking Places	\$288,615,060	\$266,613,896
Lodging (1)	\$117,420,276	\$117,147,307
Gaming (2)	\$889,189,852	\$619,729,541
Retail Trade (3)	\$146,458,172	\$134,796,498
Support Activities, Air Transportation	56,478,934	57,543,090
Travel Arrangement/Reservations	9,645,927	8,642,002
Passenger Car Rental	3,738,087	4,672,785
Air Passenger, Scheduled & Chartered	8,352,314	8,128,857
Scenic & Sightseeing Transportation	1,168,781	974,160
Charter Bus Industry	1,756,883	1,942,733
Taxi Service	902,548	1,004,709
Sub-Total, Transportation	\$82,043,474	\$82,908,336
Motion Picture Theaters	1,283,389	1,375,490
Motion Picture & Video Production	2,261,868	1,750,881
Museums, Historical Sights & Similar	5,106,006	4,896,617
Bowling Centers	820,886	761,615
Performing Arts, Spectator Sports & Related	4,411,046	4,188,523
Golf Courses	13,770,970	14,406,163
Marinas	1,372,400	1,846,299
Amusement Parks & Arcades	559,498	788,126
Laundry Services	2,631,075	2,618,535
Advertising & Related Services	5,346,618	5,675,070
State Parks, Federal & Private Outdoor Recreation (4)	15,143,908	20,414,919
State, City, County Tourism Offices and State Agencies (5)	8,150,000	12,664,707
Sub-Total, Other Services/Private and Public Recreation/ Entertainment and State/Local/Federal Government	\$60,857,664	\$71,386,945
Nonresidential Building Construction	47,939,884	68,970,224
Highway, Street and Bridge Construction	38,050,853	42,433,042
Sub-Total, Construction	\$85,990,737	\$111,403,266
Total	\$1,670,575,235	\$1,403,985,789

Appendix B (continued)

1. Does not include the payroll of employees at state-licensed casino hotels or the Pearl River Resort casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state – licensed casinos plus the employees at state-licensed casino hotels. Data do not reflect the estimated payroll of casino and hotel employees at the Pearl River Resort.
3. Includes Gasoline Stations; Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Specialty Food and Grocery Stores; Tobacco Stores; Pharmacies and Drug Stores; Florists; Book Stores and News Dealers; Prerecorded Tape, Compact Disc and Record Stores.
4. Includes Outfitters, Guides, among other full-time equivalent employment. FY 2006 marked the initial year of 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 and Natchez National Historical Park.
5. Includes the staff payroll at Mississippi's 12 Highway Welcome Centers, MDA/Tourism Division, local Tourism Offices, in addition to state Agencies such as the Mississippi Arts Commission, the Mississippi Gaming Commission, Pearl River Basin Development District, and the Pearl River Water Supply District.

SOURCES: Mississippi Arts Commission, 2006.
Mississippi Department of Wildlife, Fisheries & Parks, 2006.
Mississippi Department of Employment Security, LMI Department, 2006.
MDA/Tourism Division, 2006.
Mississippi Gaming Commission, 2006.
Mississippi Museum of Natural Science, 2006 (under Wildlife, Fisheries& Parks).
Mississippi State Tax Commission, 2006.
Pearl River Basin Development District, 2006.
Pearl River Water Supply District, 2006.

Appendix C
ESTIMATED TOURISM
EXPENDITURES, FY 2005 AND FY 2006

CATEGORY	FY 2005	FY 2006	CHANGE
Restaurants	\$923,154,035	\$849,428,995	-8.0%
Quick-Stop, Specialty Food & Grocery Stores	413,089,284	469,889,660	13.8
Concessions Quick Food	136,106,872	71,251,976	-47.7
Bar & Beer Parlors	62,606,246	35,329,422	-43.6
Lodging	518,098,263	532,279,940	2.7
Gaming (1)	2,178,938,471	1,620,542,666	-25.6
Department & General Merchandise (NEC)	787,972,334	733,270,670	-6.9
Apparel & Accessories	125,307,680	48,937,625	-60.9
Miscellaneous Retail (NEC)	80,216,624	70,190,546	-12.5
Gift, Novelty & Souvenir	76,105,875	67,952,811	-10.7
Sporting Goods, Bicycle & Music/Book Stores	30,368,324	35,817,989	17.9
Camera & Photographic Stores	12,475,657	11,687,034	-6.3
Antique & Secondhand Stores	21,529,968	14,231,648	-33.9
Cigar Stores & Stands	13,832,838	5,196,413	-62.4
Drug Stores	NA	25,760,255	NA
Gaming Related Gift/Novelty (2)	88,465,589	41,941,513	-52.6
Gasoline at 18 cents (3)	625,336,009	341,306,569	-45.4
Gasoline Service Stations	40,795,184	30,032,427	-26.4
Diesel Fuel at 18 cents (3)	75,141,242	43,039,277	-42.7
Fixed Facilities, Air Transportation (4)	11,619,517	9,412,960	-19.0
Rental & Leasing, Transportation	31,280,262	24,906,696	-20.4
Auto Repair Shops & Accessories (5)	14,436,783	32,510,020	NA
Water Passenger Transportation	632,688	185,943	-70.6
Marina Services	6,195,526	4,747,624	-23.4
Public Golf Courses	14,916,465	16,203,731	8.6
Motion Picture Shows	8,887,960	9,962,276	12.1
Dance Halls, Night Clubs	184,250	217,571	18.1
Parks	12,386,421	11,210,433	-9.5
Bowling, Billiards & Pool	2,578,896	2,363,825	-8.3
College Athletics	8,895,782	13,153,678	47.9

Appendix C (continued)

CATEGORY	FY 2005	FY 2006	CHANGE
Skating Rinks	\$1,005,177	\$915,438	-8.9
Race Tracks	231,993	280,882	21.1
Aquariums, Botanical Gardens	921,581	941,220	2.1
Museums	1,403,839	2,269,395	61.7
Licensing Fees—Nonresident Hunting & Fishing (6)	7,933,731	8,027,191	1.2
State Parks, Federal & Private Outdoor Recreation (7)	4,691,318	11,208,453	NA
National Historical Areas	1,117,690	956,988	-14.4
Advertising Specialties	2,238,371	2,214,005	-1.1
Printing & Publishing	3,193,916	2,775,175	-13.1
Laundries, Dry Cleaning	8,467,552	7,677,450	-9.3
Total	\$6,352,760,213	\$5,210,228,390	-18.0%

This Appendix Includes:

1. Net Tourist/Visitor Gross Gaming Revenues for 29 state-licensed casinos.
2. Estimated Tourism-related sales at the various retail shops.
3. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages. The FY 2005 figure was adjusted slightly downward.
4. Air Transportation, Air Terminal, Transportation Services. Includes Gross Airport Non-Operating Revenues for FY 2006, based on scheduled/charter passenger service and Passenger Facility Charges. The FY 2005 estimate was revised upward to reflect likely Passenger Facility Charges.
5. Auto Parts Stores/Accessories included in Fiscal Year 2006.
6. Only the nonresident fishing and hunting licensing portion were computed.
7. FY 2006 data includes information from an Outdoor Recreation survey, the National Forests in Mississippi, Federal Park and Lake Revenues, as well as State Parks.

SOURCES: American Automobile Association Web Site, 2006.
 MDA/Energy Division, 2006.
 MDA/Tourism Division, 2006.
 Mississippi Department of Wildlife, Fisheries & Parks, 2006.
 Mississippi Gaming Commission, 2006.
 Mississippi State Tax Commission, 2006.
 U.S. Army Corps of Engineers: Vicksburg Headquarters and the Columbus, Mississippi Office, 2006.
 U.S. Department of the Interior, National Park Service:
 Natchez National Historical Park, Vicksburg National Military Park, 2006.

Appendix D
ESTIMATED TOURISM GENERAL FUND
REVENUES, FY 2005 AND FY 2006

CATEGORY	FY 2005	FY 2006	CHANGE
Restaurants	\$38,750,150	\$35,648,125	-8.0%
Quick-Stop, Specialty Food & Grocery Stores	17,345,758	19,733,983	13.8
Concessions Quick Food	5,716,142	2,992,655	-47.6
Bar & Beer Parlors	2,629,175	1,483,837	-43.6
Lodging	21,760,148	22,245,456	2.2
Gaming (1)	131,461,309	105,425,896	-19.8
Department & General Merchandise (NEC)	33,087,367	30,792,625	-6.9
Apparel & Accessories	5,262,436	2,055,218	-60.9
Miscellaneous Retail (NEC)	3,182,819	2,741,284	-13.9
Gift, Novelty & Souvenir	3,194,739	2,852,641	-10.7
Sporting Goods, Bicycle & Music/Book Stores	1,274,424	1,502,180	17.9
Camera & Photographic Stores	517,041	484,729	-6.2
Antique & Secondhand Stores	902,890	596,241	-34.0
Cigar Stores & Stands	580,980	218,249	-62.4
Drug Stores	NA	1,081,910	NA
Gaming Related Gift/Novelty (2)	3,715,555	1,761,544	-52.6
Gasoline Service Stations	1,709,428	1,254,112	-26.6
Rental & Leasing, Transportation	900,587	716,192	-20.5
Auto Repair Shops & Accessories (3)	599,816	1,348,452	NA
Water Passenger Transportation	26,573	8,590	-67.7
Marina Services	260,093	195,804	-24.7
Public Golf Courses	597,885	642,726	7.5
Motion Picture Shows	373,295	418,416	12.1
Dance Halls, Night Clubs	6,183	6,358	2.8
Parks	517,249	469,473	-9.2

Appendix D (continued)

CATEGORY	FY 2005	FY 2006	CHANGE
Bowling, Billiards & Pool	\$108,314	\$99,281	-8.3%
College Athletics	373,169	552,455	48.0
Skating Rinks	42,217	38,449	-8.9
Race Tracks	9,518	11,656	22.5
Aquariums, Botanical Gardens	38,833	39,577	1.9
Museums	39,655	62,186	56.8
Advertising Specialties	92,791	89,925	-3.1
Printing & Publishing	134,006	115,815	-13.6
Laundries, Dry Cleaning	354,951	321,727	-9.4
Construction Activity Tax (4)	14,372,762	13,229,472	-8.0
Personal Income/Sales Tax (5)	86,008,194	73,161,164	-14.9
Total	\$375,946,452	\$324,398,403	-13.7

This Appendix Includes:

1. Approximately \$105.4 million, or 72.4 % of the \$145.7 million in General Fund Gaming Fees and Tax Transfers, were the “Net” Tourism portion. The other \$40.3 million, or 27.6 %, were not attributed to Tourism.
2. Estimated Tourism-related sales at the various retail shops.
3. Auto Parts Stores/Accessories included in Fiscal Year 2006.
4. The estimated Tourism-related portion of the General Fund based on Tourism-related construction activity, e.g., new construction, expansions/renovations.
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, 2006.
 MDA/Energy Division, 2006.
 MDA/Tourism Division, 2006.
 Mississippi State Tax Commission, 2006.

Appendix E

ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2005

COUNTY	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to <u>Cities</u> Attributed to Tourism+	Tourism Capital Investment
Adams	\$95,226,134	2,230	18.4	\$982,071	\$1,182,350
Alcorn	43,297,968	724	5.3	546,377	2,067,188
Amite	1,816,820	22	1.3	17,558	NA
Attala	16,081,118	300	5.3	195,771	NA
Benton	751,238	11	0.9	8,351	NA
Bolivar	24,807,878	465	3.8	307,054	1,657,961
Calhoun	2,349,078	27	0.8	27,967	NA
Carroll	925,422	13	1.3	8,022	NA
Chickasaw	6,273,750	80	1.2	76,053	66,000
Choctaw	1,263,045	14	0.7	14,920	NA
Claiborne	2,220,350	35	1.0	12,564	NA
Clarke	3,541,502	57	1.9	33,201	NA
Clay	13,610,658	218	2.9	163,894	NA
Coahoma	108,330,590	1,345	14.4	304,443	8,831,250
Copiah	7,005,664	120	1.5	85,604	240,050
Covington	4,198,123	73	1.4	44,870	NA
DeSoto	187,466,035	3,190	8.1	2,356,563	7,761,505
Forrest ^	144,512,662	2,800	7.4	1,863,005	27,265,600
Franklin	858,906	13	0.8	6,263	NA
George	6,056,034	95	2.1	63,745	4,800
Greene	1,459,008	15	0.8	7,573	4,800
Grenada	36,163,751	650	5.9	442,176	2,609,979
Hancock	147,471,749	2,190	15.2	746,742	26,753,917
Harrison	1,690,917,011	26,940	28.3	8,824,870	193,175,028
Hinds	385,744,275	6,620	4.6	4,689,606	30,027,244
Holmes	3,632,850	50	1.2	35,821	NA
Humphreys	2,159,896	20	0.7	23,867	NA
Issaquena	260,634	3	1.2	NA	NA
Itawamba	8,885,234	135	2.5	106,209	NA
Jackson	162,671,507	2,500	4.9	1,494,313	1,907,189
Jasper	2,589,522	42	1.1	27,721	NA
Jefferson	1,043,469	11	1.0	12,924	NA

Appendix E (continued)

COUNTY FY 2005	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to <u>Cities</u> Attributed to Tourism+	Tourism Capital Investment
Jefferson Davis	\$2,245,695	30	1.5	\$27,074	NA
Jones	49,204,141	740	2.6	595,387	1,142,800
Kemper	1,283,634	20	1.1	13,115	NA
Lafayette	61,916,650	1,175	6.9	682,581	2,435,936
Lamar ^	53,910,345	875	5.9	605,533	^
Lauderdale	118,006,806	1,875	5.1	1,435,664	937,766
Lawrence	2,280,706	30	1.1	22,533	2,697
Leake	9,288,586	105	1.7	111,469	104,406
Lee	230,501,836	3,600	6.7	2,975,265	9,846,153
Leflore	34,595,447	650	4.3	415,307	1,661,335
Lincoln	17,899,533	265	2.1	212,384	NA
Lowndes	99,954,180	1,480	5.8	1,169,952	1,586,354
Madison	138,907,395	1,895	4.3	1,732,219	9,966,660
Marion	9,208,927	126	1.6	108,288	29,250
Marshall	8,586,509	144	2.2	87,903	370,148
Monroe	19,445,244	265	2.3	224,803	594,700
Montgomery	6,893,999	80	2.8	86,032	279,010
Neshoba #	38,873,460	450	NA	472,258	5,284,266
Newton	5,257,893	69	1.0	65,925	23,000
Noxubee	3,882,624	45	1.4	34,613	18,422
Oktibbeha	55,383,064	950	4.6	632,060	533,555
Panola	16,736,002	264	2.5	201,639	1,022,537
Pearl River	26,343,876	350	3.5	294,889	547,120
Perry	1,589,972	25	1.0	17,185	66,715
Pike	37,879,500	575	3.7	441,905	254,938
Pontotoc	7,672,159	88	0.8	89,626	NA
Prentiss	6,172,055	76	0.9	63,221	3,992
Quitman	1,494,742	15	0.8	17,388	27,500
Rankin	119,207,156	2,935	5.4	1,372,506	20,402,013
Scott	15,286,520	216	1.9	183,181	182,939
Sharkey	1,222,498	13	1.1	15,079	12,000
Simpson	8,910,346	100	1.3	110,811	NA

Appendix E (continued)

COUNTY FY 2005	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to Cities Attributed to Tourism+	Tourism Capital Investment
Smith	\$1,429,670	15	0.4	\$16,760	NA
Stone	8,988,088	102	2.8	116,535	NA
Sunflower	9,761,730	160	1.6	117,618	434,097
Tallahatchie	1,940,384	26	0.9	20,739	NA
Tate	9,070,989	170	2.8	111,741	NA
Tippah	6,472,743	82	1.1	78,365	168,525
Tishomingo	7,900,003	155	2.7	84,444	2,993,459
Tunica	1,115,222,402	14,000	87.5	72,289	112,889,707
Union	10,123,445	186	2.2	126,132	121,893
Walthall	2,147,677	40	1.3	23,376	NA
Warren	221,944,503	4,300	17.0	1,377,322	24,140,457
Washington	86,014,552	1,400	6.5	738,310	6,232,227
Wayne	8,340,436	100	1.8	99,990	4,800
Webster	2,145,264	22	1.1	24,723	7,968
Wilkinson	1,951,804	25	1.3	22,418	378,968
Winston	13,192,456	212	4.2	165,184	1,702,992
Yalobusha	2,326,891	31	1.1	23,837	236,508
Yazoo	9,063,924	140	2.3	110,241	116,305
Total	\$5,841,670,342	91,700	8.2	\$41,377,937	\$513,312,935

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

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

Estimated Tourism Capital investment (TCI) is based on data from sources responding to the survey. NA indicates not available or none. ^Lamar County TCI 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: Mississippi State Tax and Mississippi Gaming Commissions; Mississippi Department of Employment Security, LMI; Jefferies & Company, Inc., New York, New York; MDOT; DFA, Bureau of Buildings and Grounds and Real Property Management; DWFP; McGraw Hill Construction; and many other Economic Development/Tourism Offices, Chambers of Commerce, Cities/Counties mentioned in the Acknowledgments, 2005.

Appendix F

ESTIMATED COUNTY TOURISM EXPENDITURES, EMPLOYMENT AND TCI, FY 2006

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	304,663	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
De Soto	195,378,529	3,290	7.9	2,433,223	25,866,545
Forrest^	145,484,326	2,805	7.1	1,798,610	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

Appendix F (continued)

COUNTY FY 2006	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to Cities Attributed to Tourism+	Tourism Capital Investment
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
Lamar^	66,062,024	885	5.9	815,161	^
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

Appendix F (continued)

COUNTY FY 2006	Tourism Expenditures	Direct Tourism Employment	Tourism Employment Percentage*	Taxes Returned to <u>Cities</u> Attributed to Tourism+	Tourism Capital Investment
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
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	\$36,028,650	\$551,228,004

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

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

Estimated Tourism Capital investment (TCI) is based on data from sources responding to the survey. NA indicates not available or none. ^Lamar County TCI 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: Mississippi State Tax and Mississippi Gaming Commissions; Mississippi Department of Employment Security, LMI; Jefferies & Company, Inc., New York, New York; MDOT; DFA, Bureau of Buildings and Grounds and Real Property Management; DFWP; McGraw Hill Construction; and many other Economic Development/Tourism Offices, Chambers of Commerce, Cities/Counties mentioned in the Acknowledgments, 2006.

Appendix G
ESTIMATED NUMBER OF HOTEL/MOTEL ROOMS BY COUNTY, FY 2005 AND FY 2006

COUNTY	HOTEL/MOTEL ROOMS (6-30-05)	HOTEL/MOTEL ROOMS (6-30-06)	PERCENTAGE CHANGE
Adams	919	1,065	15.9
Alcorn*	303	291	-4.0
Amite	15	14	-6.7
Attala	131	73	-44.3
Benton	0	0	NA
Bolivar*	440	385	-12.5
Calhoun	44	44	None
Carroll	0	15	NA
Chickasaw	62	62	None
Choctaw	0	20	NA
Claiborne	45	0	NA
Clarke	25	24	-4.0
Clay	195	166	-14.9
Coahoma	779	894	14.8
Copiah	145	80	-44.8
Covington	93	93	None
De Soto	1,755	1,783	1.6
Forrest	1,592	1,592	None
Franklin	10	6	-40.0
George	84	151	79.8
Greene	9	9	None
Grenada	642	715	11.4
Hancock	1,065	402	-62.3
Harrison	12,839	4,282	-66.6
Hinds	6,066	5,210	-14.1
Holmes	40	66	65.0
Humphreys	38	50	31.6
Issaquena	0	0	NA
Itawamba	62	62	None
Jackson	2,055	2,055	None
Jasper	26	26	None
Jefferson	0	0	NA

Appendix G (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-05)	HOTEL/MOTEL ROOMS (6-30-06)	PERCENTAGE CHANGE
Jefferson Davis	69	68	-1.5
Jones	577	588	1.9
Kemper	35	35	None
Lafayette	704	704	None
Lamar	685	630	-8.0
Lauderdale	1,583	1,755	10.9
Lawrence	54	30	-44.4
Leake	56	56	None
Lee	1,692	1,668	-1.4
Leflore	703	724	3.0
Lincoln	396	451	13.9
Lowndes	800	832	4.0
Madison	1,356	2,021	49.0
Marion	120	120	None
Marshall	162	211	30.2
Monroe	201	201	None
Montgomery	116	159	37.1
Neshoba	1,335	1,341	0.5
Newton	200	95	-52.5
Noxubee	64	64	None
Oktibbeha	707	707	None
Panola	429	429	None
Pearl River	286	286	None
Perry	0	15	NA
Pike	553	469	-15.2
Pontotoc	56	56	None
Prentiss	100	100	None
Quitman	0	0	NA
Rankin	1,397	1,397	None
Scott	282	263	-6.7
Sharkey	32	13	-59.4
Simpson	94	129	37.2
Smith	0	0	NA

Appendix G (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-05)	HOTEL/MOTEL ROOMS (6-30-06)	PERCENTAGE CHANGE
Stone	93	93	None
Sunflower	214	212	-0.9
Tallahatchie	0	0	NA
Tate	131	131	None
Tippah	82	82	None
Tishomingo	163	151	-7.4
Tunica	6,323	6,348	0.4
Union	248	248	None
Walthall	30	30	None
Warren	1,759	1,855	5.5
Washington	1,171	1,170	None
Wayne	159	174	9.4
Webster	0	10	NA
Wilkinson	0	0	NA
Winston	215	411	91.2
Yalobusha	30	20	-33.3
Yazoo	138	139	0.7
Total	55,079	46,326	-15.9

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2006 and January 2007, Cabin Rooms, or Condo/Timeshare rooms. The county-by-county room counts are based on figures provided by a variety of sources. In some instances, a different official furnished the data between one year and the next. Smith Travel Research inventory data were used for some FY 2006 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.

* The number of FY 2005 hotel/motel rooms in Alcorn and Bolivar counties were revised downward, based on data secured in August-September 2006.

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices and other local entities; Smith Travel Research, Hendersonville, Tennessee, 2006.

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, 2006.