

Fiscal Year 2003 Economic Impact

For

Tourism In Mississippi

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TABLE OF CONTENTS

	Page
Abstract.....	v
Acknowledgments.....	vii
Delimitations and Limitations	ix
Definition of Selected Terms.....	xi
INTRODUCTION	1
METHODS	2
FINDINGS.....	4
TRANSPORTATION.....	5
Welcome Center Registration Data	5
Welcome Center Reservation Service	6
Convention and Visitors Bureau Motorcoach Survey	6
Regional Airport/Air Passenger Trends.....	6
Ad Effectiveness Studies, FY 2002 and FY 2003	7
Visitor Profile Trends, CY 2001 and CY 2002	7
Greyhound.....	8
GAMING.....	11
Gaming Revenues	11
Mississippi Gaming Commission Quarterly Survey Trends	11
Gaming Employment.....	12
NonGaming Summary of Revenue for Mississippi Casinos	12
INTERNATIONAL TRAVEL	15
FY 2002 and FY 2003 Visitor Sample	15
OUTDOOR RECREATION.....	17
Mississippi Department of Wildlife, Fisheries and Parks.....	17
Selected Federal Park and Recreation Areas	17
LOCAL LEVEL INDICATORS	20
Room/Restaurant Tax Revenue	20
Meetings and Conventions.....	20
Film Productions, Documentaries and Commercials.....	21
County Revenues and Hotel/Motel Room Data	22

Table Of Contents (continued)

APPENDICES		Page
A	Estimated Statewide Tourism Employment, FY 2003.....	26
B	Estimated Statewide Tourism Payroll, FY 2003.....	28
C	Estimated Statewide Tourism Sales, FY 2003.....	30
D	Estimated Statewide Tourism Tax Revenues, FY 2003.....	33
E	Estimated County Tourism Revenues/Employment, FY 2003.....	35
F	Estimated Number of Hotel/Motel Rooms by County, FY 2002 and FY 2003.....	38

Tables

1	Origin of Highway Welcome Center Registrants by U.S. and International Travelers, FY 2002 and FY 2003	8
2	Top Ten States, FY 2002, Highway Welcome Center Registrants.....	9
3	Top Ten States, FY 2003, Highway Welcome Center Registrants.....	9
4	Top Ten Countries, FY 2002, Highway Welcome Center Registrants.....	10
5	Top Ten Countries, FY 2003, Highway Welcome Center Registrants.....	10
6	Gross Gaming Revenue Market Share by Region, FY 2002 and FY 2003	13
7	Gross Gaming Revenue Percentage Change by Region, FY 2002 and FY 2003	13
8	Selected Casino Hotel Lodging Indicators by Region, FY 2002.....	14
9	Selected Casino Hotel Lodging Indicators by Region, FY 2003.....	14
10	Top Target Markets for International Visitor Attractions, FY 2002 and FY 2003.....	16
11	State Park Visitation, FY 2002 and FY 2003	19
12	Room/Restaurant Gross Special Tax Revenues by Tourism Office, FY 2003.....	23

Abstract

This report's purpose is to estimate Tourism's economic impact data at the state and county level for FY 2003. Tourism is vital to Mississippi's economy, since:

- Tourism accounted for an estimated 91,500 direct jobs in FY 2003, based on quarterly employment figures. Thus, Tourism is the state's largest private sector employer.
- The 91,500 estimated direct jobs were 8.1 percent, or 1/12 of the total statewide nonagricultural establishment-based employment in FY 2003.
- Estimated FY 2003 Tourism annual payroll for the 91,500 direct jobs was \$1.6 billion.
- The 91,500 direct jobs were 1.3 percent less than the 92,700 direct jobs for FY 2002.
- Estimated Tourism Statewide direct sales were \$5.7 billion in FY 2003.
- Estimated Tourism State tax revenues totaled \$450 million for FY 2003.
- The estimated \$450 million in FY 2003 Tourism State tax revenues comprised 8.3 percent of the \$5.4 billion in total FY 2003 State tax collections, or \$1 of every \$12.
- Tourism's estimated proportion of Mississippi's FY 2003 General Fund—about \$343 million of the nearly \$3.4 billion General Fund—was 10.2 percent, or \$1 of every \$10.
- Estimated FY 2003 City/County Tourism tax revenues (Room/Restaurant, Gaming and Seawall Tax) were \$144.1 million, 2.2 percent less than the \$147.6 million in FY 2002.
- Estimated Return on Investment (ROI) for the State's Domestic Consumer Ad Placement and Production Costs was \$15 in FY 2002 and \$13 in FY 2003.
- The MDA/Tourism Division's Domestic Consumer Ad Placements and Ad Expenditures influenced about 10 percent of the estimated Tourism State tax revenues FY 2003.

- The number of statewide hotel/motel rooms remained flat from 54,000 in FY 2002 to 54,110 in FY 2003 while the number of statewide hotels/motels decreased from 626 as of June 30, 2002 to 618 as of June 30, 2003, or 1.3 percent.
- An estimated 90,000 tourists/visitors per day (overnight leisure, leisure day-trip and business travelers), on average, visited Mississippi in CY 2002.
- About 86 percent of the overnight leisure visitors to Mississippi in CY 2002 were from out-of-state.

The estimated FY 2003 Tourism Statewide direct sales and State tax revenues cited on page v includes leisure dollars from Mississippi tourists/visitors as well as some non-tourists/visitors.

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Delimitations and Limitations

Delimitations

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

Limitations

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

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

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

Definition of Selected Terms

Calendar Year: For purposes of this study, Calendar Year (CY) 2001 (January – December 2001) and Calendar Year 2002 (January – December 2002) data reflect Visitor Profile data for Mississippi, courtesy of D.K. Shifflet & Associates, Falls Church, Virginia.

Community Tourism Industry: A collection of businesses that create sales of goods and services to tourists/visitors. Sales include spending by tourists/visitors at businesses primarily oriented to local residents as well as tourism-oriented businesses.

Establishment-Based Employment: Reflect nonagricultural employment at the state and county level, based on monthly and quarterly averages. This is not Residence-Based data pertaining to the Civilian Labor Force at the state and county level.

Fiscal Year Quarters: For purposes of this study, first quarter figures are July-September, 2001 and 2002; second quarter figures are October-December, 2001 and 2002; third quarter figures are January-March, 2002 and 2003; and, fourth quarter figures are April-June, 2002 and 2003. Fiscal Year is abbreviated as FY throughout this report.

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

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

Mississippi Tourism Model: A combination of the Travel Economic Impact Model and Tourism Development Simulation Model to best reflect the realities of a rural state with coastal counties.

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

North American Standard Industrial Classification (NAICS) Codes: Four-to-six digit codes specified by the 1997 NAICS Manual which reflect diverse private and public sector categories. NAICS classifies establishments by type of economic activity.

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

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

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

Tourist/Visitor: Person/Travel Party making a 50-mile or more one-way trip from their primary home to enjoy the history, scenery and attractions of another community.

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

INTRODUCTION

The Mississippi Development Authority/Tourism Division is appreciative of \$6.5 million in FY 2003 and FY 2004 funding. Mississippi's executive and legislative branches have recognized that Tourism is a driving force in the state's economic development efforts. And these efforts have paid dividends.

Tourism's visibility throughout Mississippi is at an all-time high. Forty-seven local entities with a Room and/or Restaurant Tax were in place as of December 2003. 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 \$529 billion U.S. industry with 7.2 million direct jobs per the Travel Industry Association, is a vital cog in the state's economic development engine. The emergence of Tourism throughout Mississippi has brought respect and attention to this industry.

Mississippi's economy reflected a FY 2003 unemployment rate of 6.6 percent, based on 12-month moving averages. The state had a civilian labor force of 1,308,900, with an average of 86,800 unemployed persons throughout FY 2003. Four Metropolitan Statistical Areas (MSAs) comprising only Mississippi counties had these FY 2003 unemployment rates: 5.0 percent for Gulfport-Biloxi (Hancock, Harrison and Stone counties); 6.3 percent for Pascagoula (Jackson and George counties); 4.6 percent for Hattiesburg (Forrest, Lamar and Perry counties); and 4.6 percent for Jackson (Hinds, Madison and Rankin counties). Gulfport-Biloxi's MSA and Pascagoula's MSA, taken together, form a consolidated MSA. This consolidated MSA had a 5.5 percent unemployment rate in FY 2003, based on moving averages. Memphis's MSA includes De Soto and Tunica Counties, but much of their MSA data reflect Tennessee county figures.

METHODS

The purpose of this report was to estimate Tourism jobs, payroll, sales (expenditures) and State tax revenue—including the General Fund portion—plus City/County (local) tax revenue for FY 2003. Other trends, e.g., motorcoach information, Visitor Profile data, Highway Welcome Center highlights, will also be presented. Certain agencies, such as federal entities, have an October to September FY and some data reflects that period. Most of Mississippi's Convention and Visitor Bureaus are on an October-September FY as well, but the State Tax Commission compiles tax revenue information for these entities on a monthly and state FY basis.

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

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

The Mississippi State Tax Commission, Petroleum Tax Division furnished transportation-related figures. Mississippi Greyhound data were provided by their corporate office in Dallas, Texas. Airport revenues were secured from five of the state's seven regional airports.

The Mississippi Department of Wildlife, Fisheries and Parks provided hunting/fishing licensing fees and state park jobs/revenues. Officials representing the National Park Service's Gulf Islands National Seashore 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 2003 federal park revenue and employment data.

Nongaming jobs and payroll data were calculated from quarterly figures compiled by the Mississippi Employment Security Commission, Labor Market Information (LMI) Unit, through monthly averages by NAICS code from July 2002 through June 2003. FY 2003 Gaming jobs and payroll data were secured from the Mississippi Gaming Commission quarterly surveys and the Mississippi Band of Choctaw Indians, Economic Development Office.

The proportion of statewide income attributed to Tourism is included by category. A 78 percent factor was used for State-Licensed Casinos, based on various University of Southern Mississippi studies. Net Tourist/Visitor Sales Tourism factors for the retail sector included 15 percent at department stores. Statewide petroleum purchases at the retail level received a 20 percent factor. Statewide revenue figures for these purchases were calculated via self-service unleaded gas price averages for regular, mid-grade and premium fuel reported by AAA's web site. Sources for information on sales of petroleum products into Mississippi were MDA/Energy Division, the Mississippi State Tax Commission and the Mississippi Department of Transportation (MDOT). The Petroleum Tax Division of the Mississippi State Tax Commission provided sales and collections data for gasoline at 18 cents and undyed diesel fuel at 18 cents.

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

FINDINGS

Gaming, Restaurant and Lodging jobs were the top three in terms of FY 2003 direct Tourism Employment, based on Appendix A. Total estimated FY 2003 nongaming jobs represented 62.6 percent of all FY 2003 Tourism Employment. The 34,200 gaming jobs, excluding casino hotels, represented 37.4 percent of FY 2003 direct Tourism Employment.

Appendix A comprises the Tourism direct employment breakdown by category for FY 2003. Appendix B shows FY 2003 payroll-related information by employment component. Estimated Tourism direct sales totaled \$5.7 billion in FY 2003. Appendix C reflects the FY 2003 estimated Tourism direct sales.

Appendix D presents FY 2003 estimated State Tourism tax revenues. State tax revenues, based on estimated direct Tourism sales, totaled \$450 million in FY 2003. The \$450 million in FY 2003 Tourism State tax revenues were 8.3 percent of the \$5.4 billion in total FY 2003 State taxes collections. About \$343 million of the \$450 million in FY 2003 State tax revenues, or 76 percent, went into the FY 2003 General Fund while \$107 million (24 percent) was diverted, e.g., Petroleum Tax revenue from gasoline sales and Gaming taxes. Tourism's \$343 million portion of the FY 2003 General Fund was 10.2 percent (\$1/\$10).

Appendix E has estimated county level Tourism Revenues, direct Tourism Employment, the countywide establishment-based, nonagricultural employment figure and the proportion of the latter comprising Tourism jobs. The estimated 91,500 direct Tourism jobs in FY 2003 were 8.1 percent, or 1/12, of all statewide nonagricultural employment.

Appendix F groups the 54,110 statewide hotel/motel rooms in FY 2003 by county, per a MDA/Tourism Division Lodging Census. The number of statewide hotel/motel rooms remained constant in FY 2002 and FY 2003.

TRANSPORTATION

Highway Welcome Center statistics, motorcoach information, and Visitor Profile trends are highlighted in this section. Mississippi Regional Airport and Greyhound data are presented in tabular form in the appendices.

Welcome Center Registration Data

A variety of data from automobile travelers and motorcoach respondents are collected at 11 Welcome Centers located throughout the state. Travel party registrants provide the Welcome Centers with trip-related information. Mississippi Welcome Centers serviced 2,870,001 persons in FY 2003. Welcome Center registrants comprise about three-fourths of the persons serviced.

The majority of Welcome Center registrants are U.S. residents. International travelers account for a small portion; e.g., 2 percent of the total. In FY 2003, they comprised 43,931, or 1.9 percent of the 2,287,659 registrants. This proportion was also 1.9 percent in FY 2002 based on 47,783 International respondents out of 2,496,569 total Welcome Center registrants.

U.S. registrants decreased by 8.4 percent between FY 2002 and FY 2003, while the International component decreased by 8.1 percent. Total registrants decreased by 8.4 percent between FY 2002 and FY 2003, per Table 1. Louisiana, Alabama, Florida and Texas held the top four spots during the past two fiscal years in terms of out-of-state registrants, as evidenced by Tables 2 and 3. Georgia and Tennessee followed in fifth and sixth place, respectively. Tables 4 and 5 depict Canada with the most International registrants—37.8 and 33.8 percent market share during FY 2002 and FY 2003, followed by England (13.4 percent) and Germany (12.5 percent) in FY 2002, and Germany (14.9 percent) and England (13.6 percent) in FY 2003.

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 ninth year of operation in June 2003 by accounting for \$384,959 in revenue; 5,970 reservations; and 7,506 room nights booked.

Convention and Visitors Bureau Motorcoach Survey

A FY 2003 motorcoach survey revealed a \$182.6 million economic impact in terms of estimated direct expenditures based on data reported to MDA/Tourism Division. Total tours increased from 40,491 in FY 2002 to 40,856 in FY 2003, or 0.9 percent. On average, 39 passengers per tour overnighted or passed through Mississippi in FY 2002 and FY 2003. Total reported passengers increased by 0.3 percent from FY 2002 (1,573,956) to FY 2003 (1,579,023).

Regional Airport/Air Passenger Trends

Five of Mississippi's seven Regional Airports reported 1,061,645 deplanements in FY 2003. Carriers serving Jackson are Southwest Airlines, American Eagle, ASA/Delta, Comair, Continental Express, Northwest Airlines and USAirways Express. Scheduled air transportation to-and-from Gulfport-Biloxi included flights on Air Tran Airways, Atlantic Southeast, Canada 3000, Continental Southeast and Northwest Airlines. Northwest AirlinK serves the Hattiesburg-Laurel and Tupelo Regional Airports. Atlantic Southeast, Delta and Northwest serve Meridian's Airport Authority. Several of the Regional Airports, namely Gulfport-Biloxi, reported charter flights in FY 2003. The latter airport served nearly 17,000 charter passengers in FY 2003 with cities of origin such as Charlotte, Houston and Nashville.

Ad Effectiveness Studies, FY 2002/FY 2003 (Source: TNS Plog Research, July 2003)

These studies survey households outside of, but within a 500-mile radius of, Mississippi. Some goals are to identify the proportion of households that are aware of the state's advertising, measure the incremental travel that could be attributed to the MDA/Tourism Division's advertising campaign via Return on Investment (ROI) and evaluate trip satisfaction. The estimated FY 2002 ROI was roughly \$15, based on the Tourism State tax revenues generated by travel parties who saw or heard a Mississippi ad and opted to visit or extend their trip/stay as a result of that/those ad(s), divided by the Tourism Division's Domestic Consumer and Ad Placement costs. For FY 2003, the corresponding ROI was \$13.

The MDA/Tourism Division's importance can be estimated by dividing the Tourism State tax revenues "influenced"—from travel parties who saw or heard a Mississippi ad and opted to visit the state/extend their stay—by the total estimated Tourism State tax revenues. In FY 2002 and FY 2003, the Tourism Division "influenced" or helped account for about 10 percent—\$1/\$10—of the Tourism State tax revenues.

Visitor Profile Trends, CY 2001/CY 2002 (Source: D.K. Shifflet & Associates, June 2003)

Some 33 million visitors (person-trips) overnighted in, or passed through, Mississippi in CY 2002, 2 million less than in CY 2001. Overnight Leisure person-trips decreased from 13.0 million in CY 2001 to 12.2 million in CY 2002, or 6.4 percent. Total Leisure day person-trips decreased from 13.9 million in CY 2001, to 12.3 million in CY 2002, or 11.5 percent. Business person-trips increased from 8.1 million in CY 2001 to 8.3 million in CY 2002, or 3.1 percent. About 86 percent of CY 2002 Overnight Leisure visitors were from out-of-state, compared to 83 percent of the CY 2001 Overnight Leisure visitors. Ninety percent of all CY 2002 Overnight

Leisure visitors came from 10 states—Louisiana, Mississippi, Alabama, Georgia, Florida, Tennessee, Arkansas, Texas, Illinois and Missouri. Overnight Leisure visitors to Mississippi in 2002 spent \$96 per person/day versus the U.S. average of \$94. The Purpose of Stay for the Overnight Leisure visitors in 2001 was Getaway Weekend (29 percent), Visit Friend/Relative (23 percent), General Vacation (19 percent), Special Event (12 percent) and Other Personal (16 percent). In 2002, it was Getaway Weekend (30 percent), Visit Friend/Relative (26 percent), General Vacation (19 percent), Special Event (12 percent) and Other Personal (13 percent).

Greyhound

Some 144,335 Greyhound passengers came into Mississippi in FY 2003, a 0.5 percent decrease versus 145,102 in FY 2002. The FY 2003 passengers, on average, traveled 620 miles from their state/city of origin to Mississippi, a 2.5 percent decrease from 636 miles in FY 2002.

**TABLE 1
ORIGIN OF HIGHWAY WELCOME CENTER REGISTRANTS BY
U.S. AND INTERNATIONAL TRAVELERS, FY 2002 AND FY 2003**

Origin	FY 2002	FY 2003	Percentage Change
States	2,448,786	2,243,728	-8.4
Countries	47,783	43,931	-8.1
Total	2,496,569	2,287,659	-8.4

Note: Numbers reflect only those visitors who completed the registration forms.

SOURCE: Mississippi Development Authority/Tourism Division, 2003.

**TABLE 2
TOP TEN STATES, FY 2002**

State	Visitors	Percentage of States	Percentage of Top Ten
Louisiana	600,316	24.5	34.6
Alabama	275,839	11.3	15.9
Florida	222,502	9.1	11.8
Texas	212,996	8.7	12.3
Georgia	124,229	5.1	7.2
Tennessee	100,112	4.1	5.8
Missouri	56,999	2.3	3.3
Illinois	56,118	2.3	3.2
Arkansas	49,819	2.0	2.9
Michigan	33,871	1.4	2.0
Other (Non-MS)	391,363	16.0	NA
Mississippi	324,622	13.2	NA
Total	2,448,786	100.0	NA

SOURCE: Mississippi Development Authority/Tourism Division, 2002.

**TABLE 3
TOP TEN STATES, FY 2003**

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

Note: Table 2 and Table 3 numbers reflect only those visitors who completed the registration forms.

SOURCE: Mississippi Development Authority/Tourism Division, 2003.

**TABLE 4
TOP TEN COUNTRIES, FY 2002**

State	Visitors	Percentage of States	Percentage of Top Ten
Canada	18,047	37.8	46.5
England	6,389	13.4	16.4
Germany	5,973	12.5	15.4
France	2,443	5.1	6.3
Mexico	2,004	4.2	5.1
Holland	1,346	2.8	3.5
Australia	820	1.7	2.1
Switzerland	755	1.6	1.9
Japan	536	1.1	1.4
Puerto Rico*	528	1.1	1.4
Other	8,942	18.7	NA
Total	47,783	100.0	NA

* Puerto Rico is a U.S. Territory, but it was listed under the International section.

SOURCE: Mississippi Development Authority/Tourism Division, 2002.

**TABLE 5
TOP TEN COUNTRIES, FY 2003**

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

Note: Table 4 and Table 5 numbers reflect only those visitors who completed the registration forms.

SOURCE: Mississippi Development Authority/Tourism Division, 2003.

GAMING

Mississippi had 31 total casinos, 29 of which were state-licensed, as of June 30, 2003.

The average number of casinos in operation throughout FY 2003 was 31.

Gaming Revenues

Total state-licensed casino Gross Gaming revenues were about \$2.7 billion in FY 2003. About \$2.1 billion of this total, or 78 percent, were estimated “Net” Tourist/Visitor revenues. Mississippi’s total gaming-related tax revenues were \$329.4 million in FY 2003, with \$219.9 million in state receipts and \$109.5 million earmarked for cities/counties. Approximately 78 percent of the \$219.9 million in Gross Gaming state tax receipts, or \$171.5 million, comprised Net Tourist/Visitor state tax receipts. About \$130 million, or $\frac{3}{4}$ of the estimated \$171.5 million, went into the FY 2003 General Fund, while one-fourth were diverted, e.g., to MDOT.

FY 2002 and FY 2003 state-licensed casino Gross Gaming revenue Market Share by Gaming Region—North and South River and Gulf Coast—comprises Table 6. Table 7 includes the percentage change in Gross Gaming revenue by Regions between FY 2002 and FY 2003.

Mississippi Gaming Commission Quarterly Survey Trends

About 77 percent of all FY 2003 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 88 percent of out-of-state patrons, thanks to the Arkansas, Tennessee, Illinois, Oklahoma and Alabama patrons. About 44 percent of the South River Region casino patrons were from out-of-

state; e.g., Arkansas and Louisiana, while 78 percent of Coast casino patrons were from out-of-state. Florida, Louisiana and Alabama were the top three states for out-of-state Gulf Coast casino patrons, followed by Georgia and Texas.

Thirty-one Mississippi casinos contributed to the local and state economy through an FY 2003 payroll of \$936 million. The FY 2003 advertising/promotional expenditures attributed to the state-licensed casinos were \$94.4 million. Casino patrons stayed in casino hotels throughout the three Gaming regions, as evidenced by Tables 8 and 9. The number of hotel rooms presented in Tables 8 and 9 are based on FY 2002 and FY 2003 quarterly averages.

The Mississippi Gaming Commission estimated that \$4.3 billion dollars in direct/initial and subsequent capital investments for land, facilities and gaming equipment can be attributed to the 29 state-licensed casinos through June 30, 2003, excluding more recent and on-going land-based investments; e.g., hotel construction, golf course developments and RV parks.

Gaming Employment

FY 2003 quarterly casino employment figures were obtained from the Mississippi Gaming Commission via their quarterly surveys and through the Mississippi Band of Choctaw Indians. FY 2003 figures reflect 31,007 state-licensed casino employees and an estimated 3,193 Pearl River Resort casino employees. Pearl River Resort casino employment data, prior to FY 2003, were not available, for purposes of this report.

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

Room revenue at state-licensed casino hotels was \$244.1 million in FY 2003, while food and beverage revenue accounted for \$404.2 million, based on Mississippi Gaming Commission

data. The combined room plus food and beverage revenue at state-licensed casinos is significant. The \$244.1 million in room revenue plus $\frac{3}{4}$ of the food and beverage revenue—\$303.1 million—and the FY 2003 Net Tourist/Visitor Gaming revenues of \$2.1 billion, equal \$2.65 billion, or 46 percent of the \$5.7 billion total estimated FY 2003 statewide Tourism sales.

**TABLE 6
GROSS GAMING REVENUE MARKET
SHARE BY REGION, FY 2002 AND FY 2003**

Region	FY 2002 Gross Gaming Revenue	Percentage of FY 2002 Total	FY 2003 Gross Gaming Revenue	Percentage of FY 2003 Total
North River	\$1,200,253,158	44.0	\$1,184,933,537	43.9
Gulf Coast	1,160,063,114	42.6	1,170,535,939	43.3
South River	364,725,776	13.4	346,371,900	12.8
Total	\$2,725,042,048	100.0	\$2,701,841,376	100.0

SOURCES: Mississippi Gaming Commission and Mississippi State Tax Commission, 2003.

**TABLE 7
GROSS GAMING REVENUE PERCENTAGE
CHANGE BY REGION, FY 2002 AND FY 2003**

Region	FY 2002 Gross Gaming Revenue	FY 2003 Gross Gaming Revenue	Percentage Change
North River	\$1,200,253,158	\$1,184,933,537	-1.3
Gulf Coast	1,160,063,114	1,170,535,939	0.9
South River	364,725,776	346,371,900	-5.0
Total	\$2,725,042,048	\$2,701,841,376	-0.9

Note: Gulf Coast revenues are for Hancock and Harrison counties. North River revenues pertain to Coahoma and Tunica counties. South River revenues comprise Adams, Warren and Washington counties. This is the case for Tables 6 - 7 on this page and Tables 8 – 9 on page 14.

SOURCES: Mississippi Gaming Commission and the Mississippi State Tax Commission, Miscellaneous Tax Division, 2003.

TABLE 8
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2002

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percent	Average Daily Rate	REV PAR*
North River	12	6,092	87.3	\$54.70	\$47.75
Gulf Coast	13	6,853	81.0	61.16	49.54
South River	8	864	75.4	54.52	41.11
Total/Average	33	13,809	83.5	\$57.80	\$48.26

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2002.

TABLE 9
SELECTED CASINO HOTEL LODGING INDICATORS BY REGION, FY 2003

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

Note: Table 9 and Table 10 figures reflect fiscal year **quarterly averages**, and the REV PAR indicator is the Occupancy Percent times the Average Daily Rate.

SOURCE: Mississippi Gaming Commission Quarterly Surveys, 2003.

INTERNATIONAL TRAVEL

This section highlights some International Travel items for FY 2002 and FY 2003.

MDA/Tourism Division began tracking International Travel to Mississippi in CY 2001, as part of a three-year project. Thus, FY 2002 and FY 2003 comprise two full fiscal years for summary purposes. The following information is separate from the number of International Welcome Center Registrants depicted in Tables 4 and 5.

FY 2002 and FY 2003 Visitor Sample

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

Survey forms are sent to participating attractions and hotels on a quarterly basis to secure International Visitor data. This includes room nights and number of visitors by country of origin for the hotel segment and the number of visitors by country of origin for selected attractions. The sample of hotels and attractions are located throughout the state's five Tourism Regions with cities/areas including Biloxi-Gulfport, Clarksdale, Greenville, Jackson, Kosciusko, Natchez, Tupelo and Vicksburg.

Data reflected in Table 10 comprises complete information for FY 2002 and FY 2003 in terms of countries within the target markets. The "other" grouping includes many different countries, per the notation. This new section in the Economic Impact Report reflects the country-by-country breakdown for International Visitor Attractions (Table 10).

TABLE 10
**TOP TARGET MARKETS FOR INTERNATIONAL
VISITOR ATTRACTIONS, FY 2002 AND FY 2003**

Country	FY 2002 Market Total	Target Percent FY 2002 Total	Country	FY 2003 Market Total	Target Percent FY 2003 Total
England	2,790	30.5	England	3,731	30.4
Canada	2,077	22.7	Canada	2,318	18.9
Germany	1,246	13.6	Germany	1,590	12.9
Holland	1,054	11.5	Holland	1,150	9.4
Scotland	339	3.7	Scotland	592	4.8
France	338	3.7	Sweden	485	3.9
Sweden	223	2.4	France	358	2.9
Austria	172	1.9	Ireland	341	2.8
Ireland	160	1.8	Japan	336	2.7
Norway	146	1.6	Switzerland	306	2.5
Switzerland	141	1.5	Belgium	268	2.2
Japan	128	1.4	Norway	235	1.9
Belgium	122	1.3	Denmark	187	1.5
Wales	113	1.2	Wales	156	1.3
Denmark	93	1.0	Mexico	121	1.0
Mexico	17	0.2	Austria	113	0.9
Sub-Total	9,159	100.0	Sub-Total	12,287	100.0
Other#	4,712	NA	Other#	7,991	NA
Grand Total	13,871	NA	Grand Total	20,278	NA

Other includes approximately 75 other countries.

SOURCE: Mississippi Development Authority/Tourism Division, 2003.

OUTDOOR RECREATION

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

Mississippi Department of Wildlife, Fisheries and Parks

Fishing and hunting licenses issued to nonresidents are tourist/visitor indicators. Nonresident (tourists/visitors) revenues portion, based on licenses issued and sales for all game hunting, 7-day all game hunting, archery-primitive weapon, small game hunting, freshwater fishing, among other nonresident fishing and hunting activities, were \$7,438,363 in FY 2003. The number of FY 2003 nonresident fishing and hunting licenses totaled 96,421.

Mississippi's 28 State Parks provide viable Tourism options for diverse leisure pursuits. Table 11 contrasts FY 2002 and FY 2003 information for park visitation. These State Parks had 234 cabins, 48 motel rooms and 1,618 campsites on 23,467 acres in FY 2003. State Park FY 2003 employment figures are in Appendix A. Payroll data are in Appendix B. Appendix C has their estimated FY 2003 tourism revenues. FY 2003 data reflect nonresident licensing revenues and the State Park's estimated tourism-related revenues.

Selected Federal Park and Recreation Areas

Gulf Islands National Seashore reflected 807,897 total FY 2003 visits and 12,404 overnight stays. These and other Federal figures are for October 1, 2002 to September 30, 2003.

Vicksburg's National Military Park reported 735,093 FY 2003 visitors. The number of visitors to the Military Park has varied in the past few years and a significant proportion of those visitors are from out-of-state and various countries.

Vicksburg's District Office of the U.S. Army Corps of Engineers reported 4,351,286 FY 2003 combined visits at Arkabutla, Enid, Grenada and Sardis Lakes. On average, each visit was of five hours and 15 minutes duration, based on the 22.4 million visitor hours tabulated. The Columbus Office of the U.S. Army Corps of Engineers cited nearly 2.2 million FY 2003 total visits for the Mississippi recreation areas along the Tennessee-Tombigbee Waterway. This represented close to 85 percent of the overall visitation along this Waterway.

The Natchez National Historical Park accounted for 68,683 visitors in FY 2003. Their FY 2003 Eastern National Park & Monument Association sales and fee collections are reflected in Appendix B, as is the case with the same information for Vicksburg's National Military Park.

TABLE 11
STATE PARK VISITATION, FY 2002 AND FY 2003

Park	FY 2002 Visits	FY 2003 Visits	Percentage Change
Buccaneer	499,296	476,976	-4.7
Casey Jones	2,968	3,026	2.0
Clark Creek	None	1,060	NA
Clarkco	116,844	96,988	-17.0
Florewood	15,063	15,280	1.4
George P. Cossar	165,712	159,536	-3.7
Golden Memorial	4,828	4,948	2.5
Great River Road	83,200	83,164	Zero
Holmes County	80,620	79,080	-1.9
Hugh White	186,556	163,428	-12.4
J.P. Coleman	36,412	38,804	6.6
John W. Kyle	112,500	95,052	-15.5
Lake Lincoln	63,376	88,464	39.6
Lake Lowndes	194,712	173,376	-11.0
LeFleur's Bluff	226,496	316,721	39.8
Legion	70,400	63,864	-9.3
Leroy Percy	39,580	36,496	-7.8
Nanah Waiya	12,330	12,612	2.3
Natchez	46,160	39,376	-14.7
Paul B. Johnson	383,796	379,316	-1.2
Percy Quin#	1,278,436	138,248	NA
Roosevelt	185,892	194,220	4.5
Shepard	37,104	30,124	-18.8
Tishomingo	107,044	100,764	-5.9
Tombigbee	47,824	47,876	0.1
Trace	132,280	116,552	-11.9
Wall Doxey	95,240	95,220	Zero
Total	4,224,669	3,050,571	NA

Note: # An FY 2003 computer-related glitch at Percy Quin created this discrepancy.

SOURCE: Mississippi Department of Wildlife, Fisheries & Parks, 2003.

LOCAL LEVEL INDICATORS

Tourism indicators at the local level include economic impact based on motel/hotel tax levies and restaurant taxes collected. Other local indicators include, but are not limited to, meetings and conventions and special projects.

Room/Restaurant Tax Revenue

Room/Restaurant tax percentages range from 1 to 3 percent. Table 12 presents these tax percentages by jurisdiction, plus the FY 2003 gross Tourism special tax revenue. About 68.5% of the gross special tax revenues are from restaurant sales with 31.5% from lodging sales.

Meetings and Conventions

Meetings and conventions are a multi-million dollar market in Mississippi. Precise data are hard to compile due to the diverse nature of trade shows, conferences, seminars and conventions. MDA/Tourism Division, Research Unit, conducted two surveys at six-month intervals in FY 2003 on conventions, trade shows and conferences /seminars.

Tunica County hosted 291 conventions with 14,835 attendees during half of their FY 2003 (October 2002 – March 2003). Delegates, on average, spent 1.8 nights in Tunica County. Seven trade shows with 1,800 attendees and 33 conferences with 15,400 attendees were also reported for Tunica County during this six-month period. Jackson reported 67 conventions with 79,016 attendees from October 2002 – March 2003. FY 2003 data were reported by Tupelo—465 conventions, conferences and seminars with 37,899 delegates and 16 trade shows with 102,745 attendees; Hattiesburg—339 conventions/37,078 attendees plus 22 trade shows with

38,635 attendees; Grenada—91 conventions/4,811 attendees and Columbus—six conventions with 1,446 attendees; and other entities reflecting minimal convention/trade show activity.

Film Productions, Documentaries and Commercials

In FY 2003, the Mississippi Film Office coordinated the activities of more than a dozen productions, including 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.

During the second week in January, the Mississippi Film Office celebrated its 30th birthday calling attention to different aspects of the impact of the film industry. Economic development was highlighted with the creation of the Mississippi Film Enterprise Zone in Madison County; tourism development was highlighted with the unveiling of a new Made in Mississippi Movie Map; and community development was the central focus of the Film Office Birthday Celebration in the New Capitol.

In October, the Film Office issued a groundbreaking and far reaching 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 the film industry training programs and outlines the development of film funding for Mississippi production.

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

Celebration. Film Office incentive grants were given to Mississippians for the development of film projects (Fat Tuesday, The Mississippi Project), film festivals (Oxford, Natchez, Columbus, Jackson) and film programs (Crossroads Film Society, Mississippi Film and Video Alliance).

County Revenues and Hotel/Motel Room Data

Estimated FY 2003 Tourism Revenues and Employment data for Mississippi's 82 counties plus estimated countywide Tourism Employment and other indicators comprise Appendix E. The sum of Appendix E revenue figures is less than the total estimated statewide Tourism revenues per the first set of footnotes under Appendix E.

Mississippi's 618 total hotel/motel properties as of June 30, 2003, were 1.3 percent fewer than the 626 total hotel/motel properties as of June 30, 2002, per a countywide lodging census conducted by MDA/Tourism Division. The estimated number of statewide hotel/motel rooms increased from 54,000 as of June 30, 2002, to 54,110 as of June 30, 2003, or 0.2 percent, per Appendix F. Mississippi had 161 estimated bed & breakfasts (B & B's) as of June 30, 2003, with 801 total B & B rooms. These 801 rooms are a 3.7 percent decrease over the 832 B & B rooms in place as of June 30, 2002. It's estimated that 410 new statewide hotel/motel rooms were/will be under construction between the summer of 2003 and spring 2004. The estimated total statewide hotel/motel rooms are 54,520 for June 2004, 0.8 percent above June 2003 levels.

The 12-month statewide average daily rate (ADR), based on Smith Travel Research (STR) data through June 2003, was \$58. Mississippi's estimated 12-month statewide occupancy percent was about 59 percent, using STR surveys. The statewide REV PAR (revenue per available room) was \$34.22, per STR data for FY 2003.

TABLE 12
**ROOM AND RESTAURANT GROSS SPECIAL
TAX REVENUES BY TOURISM OFFICE, FY 2003**

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2003 Room Tax Revenue	Gross FY 2003 Restaurant Tax Revenue	Gross Total Special Tax Revenue
Aberdeen	1.0	1.0	\$7,837	\$51,569	\$59,406
Batesville	3.0	3.0	106,863	572,615	679,478
Bay Springs	1.0	None	5,819	None	5,819
Canton	2.0	2.0	65,100	301,474	366,574
Cleveland	2.0	2.0	60,573	400,101	460,674
Clinton	2.0	None	83,940	None	83,940
Coahoma County	2.0	1.0	74,771	212,384	287,155
Columbus-Lowndes	2.0	2.0	184,552	968,982	1,153,534
Corinth	2.0	2.0	38,628	647,606	686,234
DeSoto County	2.0	2.0	462,382	2,887,836	3,350,218
Florence	None	2.0	None	114,025	114,025
Flowood	None	2.0	None	756,402	756,402
Greenwood	1.0	1.0	34,016	242,317	276,333
Grenada	2.0	1.0	76,056	251,842	327,898
Hancock County	2.0	None	151,086	None	151,086
Harrison County	3.0	None	4,358,342	None	4,358,342
Hattiesburg	2.0	2.0	331,452	2,541,938	2,873,390
Hernando	1.0	None	10,342	None	10,342
Holly Springs	2.0	2.0	34,408	158,251	192,659
Jackson (city)	1.0	1.0	533,397	2,471,624	3,005,021
Kosciusko	2.0	None	28,902	None	28,902
Lauderdale County	2.5	None	394,350	None	394,350
Laurel	1.0	1.0	32,214	826,949	859,163

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2003 Room Tax Revenue	Gross FY 2003 Restaurant Tax Revenue	Gross Total Special Tax Revenue
Magee	1.0	1.0	10,587	120,241	130,828
Montgomery County	2.0	None	21,641	None	21,641
Moss Point	3.0	None	235,303	None	235,303
Natchez	3.0	1.5	291,879	514,605	806,484
New Albany	2.0	2.0	30,689	351,309	381,998
Newton	\$1/room	None	15,157	None	15,157
Ocean Springs	2.0	None	31,964	None	31,964
Oxford	2.0	2.0	103,413	1,018,037	1,121,450
Philadelphia	3.0	None	84,904	None	84,904
Picayune	2.0	1.0	30,305	228,835	259,140
Rankin County	2.0	None	282,626	None	282,626
Richland	None	2.0	None	219,897	219,897
Ridgeland	1.0	1.0	127,712	675,240	802,952
Southaven	1.0	None	68,750	None	68,750
Starkville	2.0	2.0	88,626	903,054	991,680
Stone County	2.0	2.0	14,130	174,965	189,095
Tishomingo County	2.0	None	10,920	None	10,920
Tunica County	3.0	3.0	745,649	1,707,071	2,452,720
Tupelo	2.0	2.0	261,184	2,065,470	2,326,654
Vicksburg	3.0	1.0	552,804	548,665	1,101,469
Washington County	1.0	1.0	72,757	447,245	520,002
West Point	1.0	None	186,417	None	186,417
Yazoo County	2.0	2.0	37,281	226,923	264,204
Total			10,379,728	22,607,472	32,987,200

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

SOURCE: Mississippi State Tax Commission, 2003.

APPENDICES

APPENDIX A
ESTIMATED STATEWIDE TOURISM EMPLOYMENT
FY 2003

CATEGORY	FY 2003	PERCENTAGE OF TOTAL FOR FY 2003
FOOD SERVICES & DRINKING PLACES (1)	28,375	31.0
LODGING (2)	14,877	16.3
GAMING (3)	34,200	37.4
RETAIL (4)	5,430	5.9
SUPPORT ACTIVITIES, AIR TRANSPORTATION	1,660	NA
TRAVEL ARRANGEMENT/RESERVATIONS	505	NA
GASOLINE STATIONS	3,308	NA
PASSENGER CAR RENTAL	168	NA
AIR PASSENGER, SCHEDULED & CHARTERED (5)	315	NA
SCENIC & SIGHTSEEING TRANSPORTATION	40	NA
CHARTER BUS INDUSTRY	111	NA
TAXI SERVICE	34	NA
SUBTOTAL, TRANSPORTATION	6,141	6.7
MOTION PICTURE THEATERS	163	NA
MOTION PICTURE & VIDEO PRODUCTION	63	NA
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	226	NA
BOWLING CENTERS	79	NA
PERFORMING ARTS, SPECTATOR SPORTS, AND RELATED INDUSTRIES	216	NA
GOLF COURSES & COUNTRY CLUBS	764	NA
MARINAS	75	NA
STATE PARKS & FEDERAL RECREATION (6)	654	NA
STATE, CITY, COUNTY TOURISM OFFICES (7)	237	NA
SUBTOTAL, OTHER (ATTRACTIONS/ ENTERTAINMENT/RECREATION/STATE/LOCAL)	2,477	2.7
TOTAL	91,500	100.0

Appendix A (continued)

This Appendix Includes:

1. Alcohol/Nonalcohol Restaurants, Drinking Places, among other establishments.
2. Estimates based on Mississippi Employment Security Commission data for Hotels & Motels (NAICS 72111), Other Traveler Accommodations (NAICS 72119) and RV Parks & Recreational Camps (NAICS 7212) plus the Mississippi Gaming Commission's quarterly data for casino hotel employees.
3. Based on Mississippi Gaming Commission quarterly survey and the data do not include casino hotel employees. FY 2003 data include Pearl River Resort casino, food & beverage and other casino-related Full-Time Equivalents (FTEs).
4. Include Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Tobacco Stores.
5. Reflects non-cargo jobs only.
6. Includes Choctaw Resort Development Enterprises.
7. Includes the number of Full-Time Equivalent (FTE) staff at Mississippi's 11 Highway Welcome Centers.

SOURCES: Mississippi Department of Wildlife, Fisheries Parks, 2003.
Mississippi Development Authority/Tourism Division, 2003.
Mississippi Employment Security Commission, LMI, 2003.
Mississippi Gaming Commission, 2003.
Mississippi State Tax Commission, 2003.
Mississippi Tourism Association, 2003.
Pearl River Resort Employment Center, 2003.

APPENDIX B
ESTIMATED STATEWIDE TOURISM PAYROLL, FY 2003

CATEGORY	FY 2003 PAYROLL
FOOD SERVICES & DRINKING PLACES	\$277,923,661
LODGING (1)	106,697,565
GAMING (2)	936,187,429
RETAIL (3)	80,730,900
SUPPORT ACTIVITIES, AIR TRANSPORTATION	62,209,335
TRAVEL ARRANGEMENT/RESERVATIONS	9,421,416
GASOLINE STATIONS	44,879,496
PASSENGER CAR RENTAL	3,251,429
AIR PASSENGER, SCHEDULED & CHARTERED	9,082,801
SCENIC & SIGHTSEEING TRANSPORTATION	706,395
CHARTER BUS INDUSTRY	1,568,410
TAXI SERVICE	749,405
SUBTOTAL, TRANSPORTATION	\$131,868,687
MOTION PICTURE THEATERS	1,253,325
MOTION PICTURE & VIDEO PRODUCTION	1,469,112
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	4,723,290
BOWLING CENTERS	801,822
PERFORMING ARTS, SPECTATOR SPORTS AND RELATED INDUSTRIES	4,100,863
GOLF COURSES	11,166,692
STATE PARKS & FEDERAL RECREATION (4)	23,818,408
STATE, CITY, COUNTY TOURISM OFFICES (5)	7,702,460
MARINAS	1,600,181
SUBTOTAL, ATTRACTIONS/ ENTERTAINMENT/RECREATION/OTHER	\$56,636,153
TOTAL	\$1,590,044,395

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. It also reflects the payroll of casino and hotel employees at the Pearl River Resort.
3. Includes Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; Tobacco Stores.
4. Includes Choctaw Resort Development Enterprises.
5. Includes the payroll of staff at Mississippi’s 11 Highway Welcome Centers.

SOURCES: Mississippi Department Of Wildlife, Fisheries & Parks, 2003.
Mississippi Development Authority/Tourism Division, 2003.
Mississippi Employment Security Commission, LMI, 2003.
Mississippi Gaming Commission, 2003.
Mississippi Tourism Association, 2003.
Pearl River Resort Employment Center, 2003.

APPENDIX C
ESTIMATED STATEWIDE TOURISM SALES
FY 2003

CATEGORY	FY 2003
RESTAURANTS	\$845,311,819
QUICK-STOP GROCERIES	320,513,438
CONCESSIONS QUICK FOOD	116,180,670
BAR & BEER PARLORS	58,612,275
LODGING	442,119,152
GAMING (1)	2,107,436,273
DEPARTMENT STORES	723,048,173
APPAREL & ACCESSORIES	120,276,611
GENERAL MERCHANDISE (NEC)	40,725,857
MISCELLANEOUS RETAIL (NEC)	81,115,004
GIFT, NOVELTY & SOUVENIR	71,578,007
SPORTING GOODS & BICYCLE	42,491,862
CAMERA & PHOTOGRAPHIC STORES	12,294,887
ANTIQUE & SECONDHAND STORES	20,804,098
CIGAR STORES & STANDS	21,799,421
GASOLINE AT 18 CENTS (2)	469,976,102
GASOLINE SERVICE STATIONS	41,771,130
DIESEL FUEL AT 18 CENTS	48,459,084
FIXED FACILITIES, AIR TRANSPORTATION (3)	1,842,492
REGIONAL AIRPORTS	20,192,861
RENTAL & LEASING, TRANSPORTATION	\$34,005,395

CATEGORY	FY 2003
AUTO REPAIR SHOPS	13,529,111
GREYHOUND	2,146,030
MARINA SERVICES	5,041,845
PUBLIC GOLF COURSES	10,041,025
MOTION PICTURE SHOWS	8,877,030
DANCE HALLS, NIGHT CLUBS	252,152
PARKS	12,889,870
BOWLING, BILLIARDS & POOL	2,639,477
COLLEGE ATHLETICS	7,634,614
SKATING RINKS	685,752
RACE TRACKS	244,047
AQUARIUMS, BOTANICAL GARDENS	836,149
MUSEUMS	1,272,051
LICENSING FEES--NONRESIDENT HUNTING & FISHING (4)	7,438,363
STATE PARKS	4,809,916
FEDERAL PARKS & LAKES	730,030
NATIONAL HISTORICAL AREAS	1,544,499
ADVERTISING SPECIALTIES	2,179,629
PRINTING & PUBLISHING	2,945,464
LAUNDRIES, DRY CLEANING	7,750,350
TOTAL	\$5,734,042,015

Appendix C (continued)

This Appendix Includes:

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

SOURCES: American Automobile Association Web Site, 2003.
Choctaw Resort Development Enterprise Web Site, 2003.
Greyhound Corporate Headquarters, Dallas, Texas, 2003.
Mississippi Development Authority/Energy Division, 2003.
Mississippi Development Authority/Tourism Division, 2003.
Mississippi Department of Wildlife, Fisheries & Parks, 2003.
Mississippi Gaming Commission, 2003.
Mississippi State Tax Commission, 2003.
Mississippi's Regional Airports, 2003.
U.S. Army Corps of Engineers, Vicksburg Headquarters and the Columbus, Mississippi Office, 2003.
U.S. Department of the Interior, National Park Service:
Gulf Islands National Seashore, Natchez National Historical Park,
Vicksburg National Military Park, 2003.

APPENDIX D
ESTIMATED STATEWIDE
TOURISM TAX REVENUES, FY 2003

CATEGORY	FY 2003
RESTAURANTS	\$59,130,668
QUICK-STOP GROCERIES	22,432,500
CONCESSIONS QUICK FOOD	8,126,017
BAR & BEER PARLORS	4,098,570
LODGING	30,946,466
GAMING (1)	171,541,927
DEPARTMENT STORES	50,566,839
APPAREL & ACCESSORIES	8,402,521
GENERAL MERCHANDISE (NEC)	2,833,957
MISCELLANEOUS RETAIL (NEC)	5,445,543
GIFT, NOVELTY & SOUVENIR	4,993,349
SPORTING GOODS & BICYCLE	2,973,254
CAMERA & PHOTOGRAPHIC STORES	856,753
ANTIQUE & SECONDHAND STORES	1,453,784
CIGAR STORES & STANDS	1,525,961
GASOLINE AT 18 CENTS (2)	58,497,935
GASOLINE SERVICE STATIONS	2,915,148
DIESEL FUEL AT 18 CENTS (2)	6,098,807
FIXED FACILITIES, AIR TRANSPORTATION (3)	104,617

Appendix D (continued)

CATEGORY	FY 2003
RENTAL & LEASING, TRANSPORTATION	\$1,691,710
AUTO REPAIR SHOPS	933,608
MARINA SERVICES	337,571
PUBLIC GOLF COURSES	703,255
MOTION PICTURE SHOWS	621,393
DANCE HALLS, NIGHT CLUBS	15,175
PARKS	898,919
BOWLING, BILLIARDS & POOL	184,763
COLLEGE ATHLETICS	534,423
SKATING RINKS	48,003
RACE TRACKS	17,083
AQUARIUMS, BOTANICAL GARDENS	58,733
MUSEUMS	55,385
ADVERTISING SPECIALTIES	143,100
PRINTING & PUBLISHING	205,967
LAUNDRIES, DRY CLEANING	539,941
TOTAL	\$449,933,645

This Appendix Includes:

1. Approximately \$130 million, or about $\frac{3}{4}$ of the Net Tourist/Visitor State Gaming Tax Revenues, went to the General Fund. The other $\frac{1}{4}$ of these State Gaming Tax Revenues were diverted.
2. First Sales of Petroleum Products into Mississippi for Consumption and AAA Self Service Unleaded Gas Price Averages. The estimated tourism-related gasoline/diesel fuel State Tax Revenues were diverted to MDOT/other agencies.
3. Air Transportation and Air Terminal Service.

SOURCES: American Automobile Association Web Site, 2003.
 Mississippi Development Authority/Energy Division, 2003.
 Mississippi Development Authority/Tourism Division, 2003.
 Mississippi State Tax Commission, 2003.

Appendix E
ESTIMATED COUNTY TOURISM REVENUES/EMPLOYMENT
[FY 2003]

COUNTY	Total Tourism Revenues	Total Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage
Adams	\$96,217,471	2,360	13,740	17.2
Alcorn	39,525,474	698	14,190	4.9
Amite	1,619,166	22	2,360	0.9
Attala	16,786,833	318	5,890	5.4
Benton	684,566	11	1,430	0.8
Bolivar	21,575,956	375	13,190	2.8
Calhoun	2,189,715	27	3,900	0.7
Carroll	1,028,253	14	1,280	1.1
Chickasaw	6,088,692	75	6,720	1.1
Choctaw	1,027,007	16	2,210	0.7
Claiborne	2,107,192	34	4,250	0.8
Clarke	3,357,942	55	4,370	1.3
Clay	13,294,570	200	8,830	2.3
Coahoma	113,173,230	1,320	10,660	12.4
Copiah	6,525,293	100	7,730	1.3
Covington	3,139,191	60	4,900	1.2
De Soto	163,478,160	2,765	35,540	7.8
Forrest	141,129,265	2,500	39,040	6.4
Franklin	730,196	11	1,690	0.7
George	5,003,257	75	3,870	1.9
Greene	1,257,607	15	1,910	0.8
Grenada	33,755,900	608	11,100	5.5
Hancock	118,385,778	2,080	14,270	14.6
Harrison	1,497,219,977	25,000	93,930	26.6
Hinds	424,783,579	6,800	112,120	6.1
Holmes	3,897,711	58	4,000	1.5
Humphreys	1,952,025	25	3,030	0.8
Issaquena	197,550	3	270	1.1
Itawamba	8,314,780	120	5,390	2.2
Jackson	141,194,663	2,365	50,400	4.7
Jasper	2,670,062	38	4,610	0.8
Jefferson	877,254	10	1,230	0.8

Appendix E

COUNTY	Total Tourism Revenues	Total Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage
Jefferson Davis	\$2,176,176	32	2,280	1.4
Jones	43,516,214	730	28,410	2.6
Kemper	1,456,870	21	1,940	1.1
Lafayette	49,673,295	903	16,560	5.5
Lamar	36,388,837	675	13,460	5.0
Lauderdale	110,568,399	1,700	36,640	4.6
Lawrence	2,000,811	29	2,830	1.0
Leake	9,201,278	115	7,070	1.6
Lee	218,981,532	3,440	54,850	6.3
Leflore	29,241,199	500	16,300	3.1
Lincoln	16,095,666	254	12,300	2.1
Lowndes	99,120,778	1,490	26,960	5.5
Madison	111,500,924	1,500	44,090	3.4
Marion	7,124,368	103	7,910	1.3
Marshall	8,691,560	145	7,300	2.0
Monroe	17,196,994	220	10,860	2.0
Montgomery	7,019,762	85	3,070	2.8
Neshoba#	37,760,735	4,300	14,250	30.2
Newton	4,477,380	67	6,510	1.0
Noxubee	3,446,033	45	3,470	1.3
Oktibbeha	51,355,071	890	21,000	4.2
Panola	15,687,839	283	10,870	2.6
Pearl River	24,444,300	335	9,960	3.4
Perry	1,625,945	25	2,520	1.0
Pike	36,962,173	535	15,690	3.4
Pontotoc	5,940,551	85	10,310	0.8
Prentiss	4,565,312	76	8,870	0.9
Quitman	2,086,178	23	1,900	1.2
Rankin	97,577,325	2,750	74,850	3.7
Scott	14,278,394	200	11,330	1.7
Sharkey	1,098,863	13	1,370	1.0
Simpson	8,449,140	144	7,230	2.0
Smith	1,228,124	15	3,830	0.4

Appendix E (continued)

COUNTY	Total Tourism Revenues	Total Tourism Employment	Total Establishment Based Employment*	Tourism Employment Percentage
Stone	\$7,562,264	85	3,360	2.5
Sunflower	8,922,316	151	11,660	1.3
Tallahatchie	1,832,028	22	2,570	0.9
Tate	7,856,353	141	6,570	2.1
Tippah	5,196,449	70	7,380	1.0
Tishomingo	7,019,341	100	6,430	1.6
Tunica	1,064,778,796	14,500	17,340	83.6
Union	8,941,864	170	9,190	1.8
Walthall	2,247,292	35	3,140	1.1
Warren	213,700,225	4,400	25,730	17.1
Washington	91,806,099	1,405	22,760	6.2
Wayne	7,391,576	100	5,700	1.8
Webster	1,603,764	21	2,840	0.7
Wilkinson	1,943,644	22	1,800	1.2
Winston	12,612,102	200	5,370	3.7
Yalobusha	1,915,480	30	3,400	1.2
Yazoo	12,663,948	153	6,740	2.3
Total	\$5,412,119,875	91,500	1,126,820@	8.1

Appendix E does **not** include Gasoline Sales at the pump for 79 Mississippi Counties, Diesel Fuel Sales, some Federal Parks, Non-Resident Licensing Fees, Regional Airports or Greyhound Sales. It includes estimated Net Tourist/Visitor State-Licensed Casino Gaming Revenues for the seven counties with State-Licensed Casinos: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

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

*Total Establishment Based Employment reflects CY 2002 data at the county level, per the Mississippi Employment Security Commission's May 2003 Annual Averages, 2001 – Forward. This is the nonagricultural employment total by county based on monthly averages, but **not** the Residence Based data (the Civilian Labor Force).

@ The Statewide and County Establishment Based Employment figures reflect nonagricultural monthly averages.

SOURCES: Mississippi State Tax, Gaming and Employment Security Commissions; Jefferies & Company, Inc., New York, New York, 2003.

Appendix F
ESTIMATED NUMBER OF HOTEL/MOTEL ROOMS BY COUNTY
[FY 2002 AND FY 2003]

COUNTY	HOTEL/MOTEL ROOMS (6-30-02)	HOTEL/MOTEL ROOMS (6-30-03)	PERCENTAGE CHANGE
Adams	936	946	1.1
Alcorn	473	483	2.1
Amite	15	0	NA
Attala	141	131	-7.1
Benton	0	0	NA
Bolivar	373	425	13.9
Calhoun	40	26	-35.0
Carroll	0	0	NA
Chickasaw	80	62	-22.5
Choctaw	0	0	NA
Claiborne	44	0	NA
Clarke	25	25	None
Clay	195	195	None
Coahoma	762	780	2.4
Copiah	143	143	None
Covington	93	93	None
De Soto	1,565	1,691	8.1
Forrest	1,546	1,546	None
Franklin	10	10	None
George	84	84	None
Greene	0	0	NA
Grenada	630	642	1.9
Hancock	1,073	1,073	None
Harrison	12,637	12,351	-2.3
Hinds	6,043	5,876	-2.8
Holmes	67	50	-25.4
Humphreys	0	20	NA
Issaquena	0	0	NA
Itawamba	40	55	37.5
Jackson	2,638	2,293	-13.1
Jasper	26	26	None
Jefferson	0	0	NA

Appendix F (cont.)

COUNTY	HOTEL/MOTEL ROOMS (6-30-02)	HOTEL/MOTEL ROOMS (6-30-03)	PERCENTAGE CHANGE
Jefferson Davis	80	48	-40.0
Jones	577	577	None
Kemper	54	35	-35.2
Lafayette	634	685	8.0
Lamar	509	509	None
Lauderdale	1,661	1,525	-8.2
Lawrence	54	31	-42.6
Leake	56	56	None
Lee	1,590	1,548	-2.6
Leflore	603	649	7.6
Lincoln	396	499	26.0
Lowndes	854	820	-4.0
Madison	1,039	1,216	17.0
Marion	117	117	None
Marshall	201	202	0.5
Monroe	203	201	-1.0
Montgomery	147	158	7.5
Neshoba	873	1,335	52.9
Newton	87	85	-2.3
Noxubee	64	42	-34.4
Oktibbeha	711	783	10.1
Panola	437	403	-7.8
Pearl River	312	281	-9.9
Perry	0	0	NA
Pike	582	573	-1.5
Pontotoc	62	62	None
Prentiss	100	100	None
Quitman	0	0	NA
Rankin	1,280	1,440	12.5
Scott	255	302	18.4
Sharkey	0	0	NA
Simpson	122	109	-10.7
Smith	0	0	NA

Appendix F (continued)

COUNTY	HOTEL/MOTEL ROOMS (6-30-02)	HOTEL/MOTEL ROOMS (6-30-03)	PERCENTAGE CHANGE
Stone	93	93	None
Sunflower	225	190	-15.6
Tallahatchie	0	0	NA
Tate	131	131	None
Tippah	57	57	None
Tishomingo	151	154	2.0
Tunica	6,256	6,320	1.0
Union	235	282	20.0
Walthall	30	30	None
Warren	1,778	1,766	-0.7
Washington	1,163	1,163	None
Wayne	174	142	-18.4
Webster	0	0	NA
Wilkinson	18	18	None
Winston	171	171	None
Yalobusha	30	30	None
Yazoo	139	139	None
Total	54,000	54,110	0.2

This Appendix does not include Bed & Breakfast Rooms, Hotel/Motel Rooms under construction between July 2002 and January 2003, Cabin Rooms, nor Condo/Timeshare rooms. The number of hotel/motel rooms in Neshoba County includes their 572-room hotel, which opened in FY 2003. 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.

SOURCES: Mississippi Chambers of Commerce, Economic Development Offices, cities, Convention and Visitor Bureaus, Tourism Offices, and other local entities, 2002 and 2003.