



TOURISM
ECONOMIC
IMPACT
REPORT



TWO THOUSAND SEVENTEEN

VISIT
MISSISSIPPI



Welcome to the Fiscal Year 2017 Economic Impact Report of Travel and Tourism in Mississippi. This report gives a detailed analysis of the tremendous role tourism plays in Mississippi's economy. Clearly, tourism is big business in Mississippi. During the last fiscal year, more than 23 million visitors spent \$6.3 billion in Mississippi and generated \$398.7 million for the state's General Fund. I invite you to consider exploring more of Mississippi for yourself. Every region in the state has a wealth of unique sights, sounds, tastes and experiences worthy of your time.

A handwritten signature in black ink that reads "Phil Bryant".

Governor Phil Bryant



Tourism is a vital component of our state's economy. More than 87,000 Mississippians work directly in the travel and tourism trade, with nearly 98 percent employed in the private sector. Still, those numbers only tell part of the story. The attractions making up Mississippi's vast tourism assets also create more vibrant communities where people not only want to visit, but also to live. Quality of life is directly related to the abundance of opportunities. In Mississippi, we are fortunate to have both.

A handwritten signature in black ink that reads "Glenn McCullough, Jr.".

Glenn McCullough, Jr.
EXECUTIVE DIRECTOR
MISSISSIPPI DEVELOPMENT AUTHORITY



Visit Mississippi is dedicated to promoting the state's array of attractions to people across the U.S. and around the world. When visitors dine in our restaurants, stay overnight and play at our golf courses and casinos, they experience genuine hospitality. These visitors respond by spending more money – \$46 million, or 0.7 percent, over FY 2017 – and this growth allows our state to succeed in many other areas. Considering our unmatched contributions to music, literature and the arts, culture may be Mississippi's most valuable currency.

A handwritten signature in black ink that reads "D. C. Ray".

D. Craig Ray
DIRECTOR
VISIT MISSISSIPPI

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EXECUTIVE SUMMARY

With an estimated 23.15 million visitors to Mississippi in Fiscal Year 2017, travel and tourism is vital to the state's economy, contributing 87,335 direct jobs, a 0.8-percent increase from the prior fiscal year. Nearly 98 percent of the new jobs were in the private sector. Travel and tourism comprised 7.6 percent of FY 2017 total direct statewide establishment-based nonfarm employment. This report estimates travel and tourism's FY 2017 economic contribution at the state and county level for Mississippi.

Food services and drinking establishments, state-licensed gaming and lodging jobs held the top three spots in direct FY 2017 travel and tourism employment in Mississippi. The 22,228 state-licensed casino gaming jobs, including casino hotels, equaled 25.5 percent of direct travel and tourism employment. All other direct travel and tourism jobs accounted for the remaining 74.5 percent.

Casino hotel rooms accounted for 12,590, or 21.1 percent, of 59,668 statewide hotel/motel rooms. In 2017, a Mississippi casino hotel, on average, had 450 rooms; noncasino hotel/motels had an average of 70 rooms.

Nearly 98 percent of the new jobs created last year in travel and tourism were in the private sector.



FY 2017 EXPENDITURES

Estimated travel and tourism expenditures by visitors totaled \$6.343 billion in FY 2017, versus \$6.297 billion in FY 2016, a year-over-year increase of \$46 million, or 0.7 percent. The \$6.343 billion spent is the second highest of all time, behind \$6.352 billion spent in FY 2005. Travel and tourism's \$398.7 million slice of the FY 2017 General Fund was 7.4 percent, via visitor expenditures, tourism capital investment, travel and tourism personal income, sales taxes and other taxes. Travel and tourism total employment – direct, indirect and induced – was 124,680, or 10.9 percent of jobs in the state. These jobs generated \$3 billion in total FY 2017 labor income.

Direct, indirect and induced employment in travel and tourism generated **\$3 billion** in total FY 2017 labor income.

Travel and tourism is one of Mississippi's largest export industries and a major contributor to the state's financial affairs and quality of life. If other sectors remained constant, Mississippi's economy without travel and tourism would yield:

- \$398.7 million less in General Fund revenues.
- 124,680 fewer total jobs (direct, indirect and induced).
- \$3 billion less in total annual payroll associated with this industry and quality-of-life issues.

Subtracting the 87,335 direct statewide travel and tourism jobs from Mississippi's economy would more than double the state's annual unemployment rate from 5 percent to 11.8 percent. Most of the 87,335 direct and 37,345 secondary travel and tourism jobs cannot be outsourced.

MISSISSIPPI AS AN ATTRACTION

Out-of-state visitors spent an estimated **\$4.9 billion** in Mississippi in FY 2017.

TRAVEL AND TOURISM EXPORTS AND IMPORTS

Travel and tourism is one of Mississippi's largest export industries, generating economic benefits directly affecting the state. Out-of-state visitors to Mississippi spent more on travel and tourism than Mississippi residents spent on travel and tourism in other states or abroad. Travel and tourism is a composite industry, comprising different sectors of the economy.

Out-of-state visitors spent an estimated \$4.9 billion in Mississippi, accounting for 77.3 percent of the \$6.343 billion in statewide FY 2017 visitor spending. Mississippians traveling within the state – 50 miles or more, one-way – spent an estimated \$1.44 billion on in-state trips, or 22.7 percent of \$6.343 billion. An in-state visitor, on average, spent \$195 on their entire Mississippi trip, versus \$304 for an out-of-state domestic visitor. An international visitor, on average, spent \$1,068 on their Mississippi trip.

HOUSEHOLD TAX RELIEF AND ESTIMATED EFFECTIVE TAX RATES

The \$461.6 million collected in 2017 travel and tourism state tax revenues/fees, plus \$184.7 million in city/county tax revenues and fees, were divided by 1,098,803 Mississippi households. The result was \$588 in tax relief per household, or \$420 in state tax relief and \$168 in local tax relief. The 2016 tax relief estimate was \$583 per household.

A CONSISTENT PRODUCER

Travel and tourism is a consistent producer in Mississippi. This includes real and personal property taxes paid by hotels/motels, bed-and-breakfasts, restaurants and casinos; 18.5 percent of the 7-percent state sales tax allocated to cities; motor vehicle rental taxes; and petroleum taxes, among others. Cities, counties and schools benefit from property taxes paid by lodging, food and beverage and other businesses.

EMPLOYMENT RANKINGS AND TRENDS

Travel and tourism was fourth in total estimated private FY 2017 direct nonfarm, establishment-based employment, behind manufacturing, private health care and social assistance and retail trade. Most of the direct FY 2017 statewide travel and tourism jobs – 85,365 of 87,335, or 97.7 percent – were private sector careers, including hotels/motels, restaurants, casinos and retail. The other 1,970, or 2.3 percent, were staff in state parks, federal parks, outdoor recreation, airports, historic sites, state/local tourism offices, museums, performing arts centers and spectator sports sites.

Statewide direct travel and tourism jobs in FY 2017 accounted for 7.6 percent of all establishment-based nonfarm jobs, while 86,600 statewide direct travel and tourism jobs in FY 2016 were 7.6 percent of all jobs.

Mississippi's 87,335 direct travel and tourism jobs in FY 2017 were the most in 12 years and 2,035 more than the FY 2007, pre-“Great Recession,” number of 85,300. The 87,335 direct travel and tourism jobs in FY 2017

comprised 102.4 percent of the 85,300 pre-recession figure in FY 2007.

Statewide travel and tourism direct jobs averaged 86,295 per year during the 20 years from FY 1998 through FY 2017. Thus, 87,335 direct statewide travel and tourism jobs in FY 2017 were 1,040 more, or 1.2 percent higher, than the 20-year average. Direct travel and tourism jobs ranged from a low of 75,200 in FY 2006 in the aftermath of Hurricane Katrina to a high of 94,100 in FY 2000.



Mississippi's
**87,335 direct
travel and
tourism jobs**
in FY 2017 were the
most in 12 years.

CITY/COUNTY/STATE LEVEL INDICATORS

Local **travel and tourism indicators** include economic contributions from:

- Hotel/motel tax levies and restaurant taxes collected
- Petroleum tax distribution
- Motor vehicle rental tax diversions
- Alcohol beverage control
- Seawall taxes
- Real and personal property taxes paid by hotels/motels, restaurants and casinos
- Tourism capital investment permit fees

TRAVEL AND TOURISM EXPENDITURES/LODGING DATA

Mississippi had 701 total hotel/motel properties as of Dec. 31, 2017, per a countywide lodging census conducted by Visit Mississippi, plus census data from STR, a source for global data benchmarking, analytics and marketplace insights. From Dec. 31, 2016 to Dec. 31, 2017, statewide hotel/motel capacity jumped by 400 rooms, from 59,268 to 59,668, a 0.7-percent increase. An estimated 900 new statewide hotel/motel rooms were either under construction or could be finalized by Dec. 31, 2018. This would be an inventory increase of 1.5 percent, from 59,668 to 60,568. Mississippi's inventory had 147 estimated bed-and-breakfast properties as of Sept. 30, 2017, with 797 total bed-and-breakfast rooms, 1,312 cabins, 13,910 recreational vehicle spaces with electricity and water, and 1,932 camp sites without hook-up.

In Calendar Year 2017, Mississippi noncasino lodging facilities achieved a statewide average daily rate of \$85.42, based on STR research, a 0.9-percent increase versus \$84.63 in CY 2016. Mississippi's CY 2017

statewide occupancy was 56.9 percent using STR data for noncasino properties, identical to CY 2016. State-licensed casino hotels had a 77.5 occupancy percent in FY 2017, but many rooms at casino hotels were used free-of-charge by preferred customers or prize winners. Their FY 2017 average daily rate was \$68.30. State-licensed casino hotel rooms totaled 11,520 as of Dec. 31, 2017, excluding 1,071 hotel rooms at two Pearl River Resort hotels.

CITY/COUNTY TAX REVENUES AND FEES ATTRIBUTED TO TRAVEL AND TOURISM

Travel and tourism's contribution to the local economy includes city/county tax revenues and permit fees. Some \$56.8 million, or 30.8 percent, of \$184.7 million in city/county taxes and fees attributed to travel and tourism in FY 2017 came from the state-licensed casino city/county tax revenue portion of gross gaming revenues. Another \$127.9 million, or 69.2 percent, were from room/restaurant special tax revenues, hotel/motel real and personal property taxes for casinos/

casino hotels, other hotels, restaurants, seawall taxes for coastal counties, Alcoholic Beverage Control permit license fees, petroleum taxes, motor vehicle rentals and tourism capital investment permit fees. These tax revenues do not include 18.5 percent of the state's 7-percent tax rate originating at the state level.

Room/restaurant tax percentages range from 1 to 5 percent. Approximately \$54.8 million, or 70.5 percent, of FY 2017 special tax revenues were from restaurant sales, with \$23 million, or 29.5 percent, from lodging. FY 2017 special tax revenues totaled \$77.8 million.

TRAVEL AND TOURISM ADVERTISING AND EMPLOYMENT BY PARTNERS

Thirty tourism partners – convention and visitors bureaus; tourism commissions; and partnerships – received FY 2017 advertising and employment/payroll mini-surveys from October 2016 to September 2017. Nineteen, or 63.3 percent, responded, including a convention center. FY 2017 travel and tourism



MISSISSIPPI TRAVELER

AVG. ANNUAL HOUSEHOLD INCOME **\$71,900**

MEDIAN INCOME **\$57,400**

AVG. AGE **48**

MEDIAN AGE **49**

AVG. TRAVEL PARTY SIZE **2.5**

AVG. TRAVEL PARTY SIZE FOR LEISURE **2.7**

AVG. TRAVEL PARTY SIZE FOR BUSINESS **1.9**

AVG. NIGHTS SPENT **2.9**

employment/payroll data reflected 166 full-time, 138 part-time and 233 full-time-equivalent staff with \$10.93 million in salaries, wages and fringe benefits. The employment component is included in Appendix A (page 20) and the payroll item in Appendix B (page 21), under a broader category. The travel and tourism partners responding to the survey, including one convention center, reflected a FY 2017 total estimated budget of \$31.4 million. The FY 2017 advertising summary indicates \$10.76 million was spent by survey respondents, with \$3.63 million, or 33.8 percent, on traditional ad placement and production; \$2.1 million, or nearly 20 percent, on digital media placement, plus digital media services totaling \$310,049. Another \$520,840 was spent on ad agency retainer fees, \$285,242 for promotional items, \$285,793 for trade show participation, \$125,234 for familiarization tours, \$267,066 for billboard advertising, \$401,836 for brochure, collateral and other printing, \$2,295,458 in sponsorships and local events, \$470,271 for web site maintenance and other web services and \$43,000 from matching grants.

MISSISSIPPI VISITOR PROFILE STUDY

About 23.15 million estimated total visitors in FY 2017 – domestic leisure, business, other personal, all group travel and international visitors – overnighted in or participated in a day trip to Mississippi, an increase of 0.7 percent versus 23 million in FY 2016. Mississippi had 22 million visitors per year, on average, in a 20-year period, 1998 to 2017, from a low of 19 million visitors in 2009 (recession year) to a high of 24.3 million in 2000. Included in the finding were

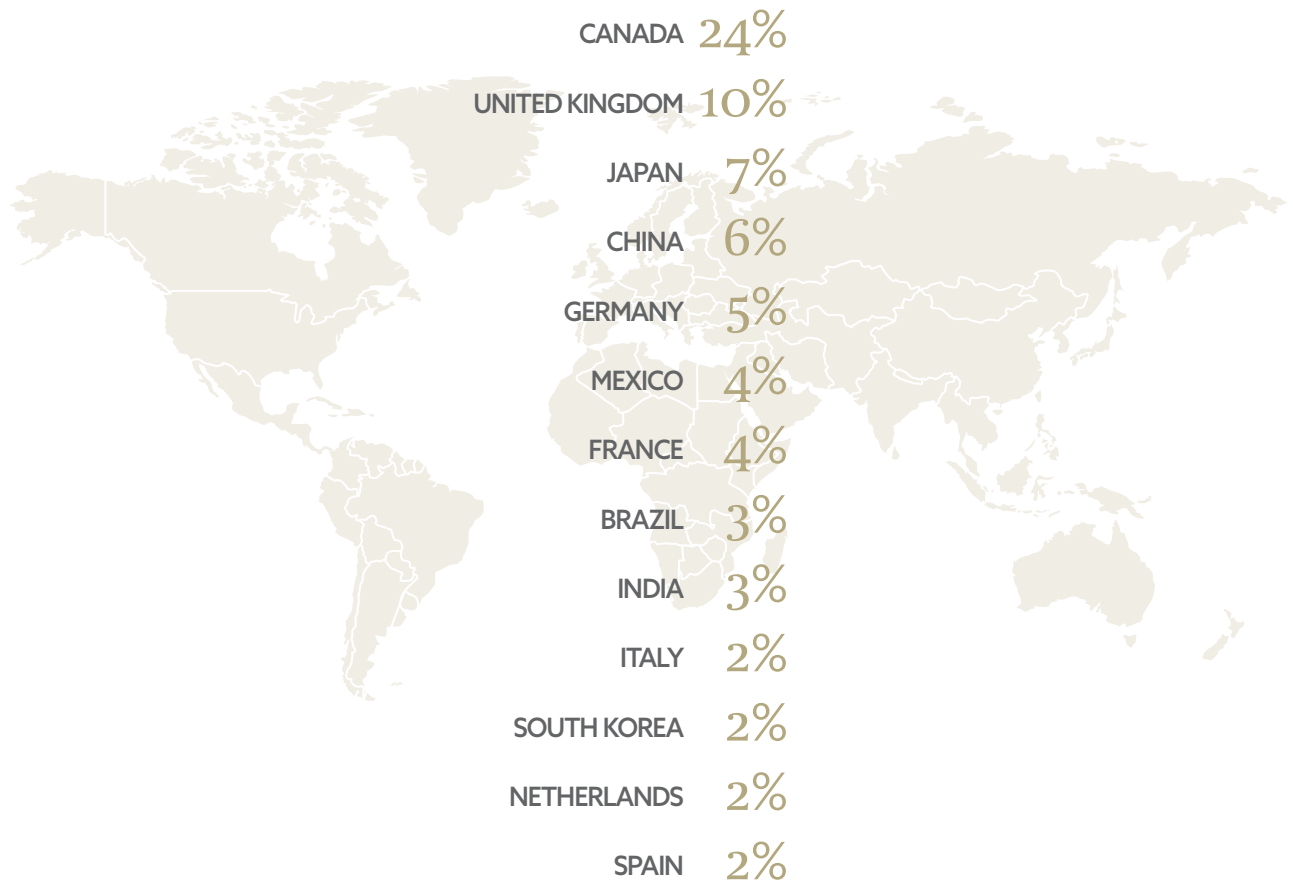
the OmniTrak Group Inc. Mississippi Travels America FY 2017 Visitor Profile study; Mississippi Gaming Commission quarterly surveys of patrons by state of origin and occupancy rates for state-licensed casino hotels; STR surveys; Mississippi Welcome Center registration data; and state park visitation, among other sources.

OmniTrak Group Inc., a domestic visitation source, cited 83 percent as leisure travelers-tourists; 10 percent business and 7 percent personal business/other. Sixty-eight percent of all visitors were from out-of-state, with 32 percent from in-state. Sixty-two percent of Mississippi trips were overnight, while 38 percent were day trips. For leisure trips to Mississippi, 66 percent were overnight stays and 34 percent were day trips. Business trips to Mississippi broke down to 60 percent overnight stays and 40 percent day trips. Average annual household income for all Mississippi visitors was \$71,900, with a median income of \$57,400. The average age of a visitor was 48; the median age was 49. The average travel party size was 2.5 persons – 2.7 persons for leisure; 1.9 persons for business – with 2.9 nights spent in Mississippi. Leisure travelers spent 1.4 percent less in FY 2017 than in FY 2016. Business travel spending also declined in FY 2017, versus FY 2016. About 45 percent traveled in pairs, and 25 percent traveled with children. Four percent of Mississippi visitors arrived by air. Vacation activities varied with casino gamers as the largest market, at 25 percent. Data was based on survey respondents who traveled at least 50 miles, one-way, from home, or overnighted for business or pleasure, excluding commuters. All respondents must have traveled in the past 12 months.

INTERNATIONAL TRAVEL TO MISSISSIPPI

Per Tourism Economics, an Oxford Economics Company, Mississippi received 149,900 international overnight visitors in CY 2016, a 1.6-percent increase versus 147,600 international visitors in CY 2015. Canada comprised 36,000, or 24 percent of international visits in CY 2016, followed by the United Kingdom's 15,000 visits, or 10 percent of all visits. Countries ranked third through tenth in 2016 visits were Japan with 11,000, China with 10,000, Germany with 7,000, Mexico and France with 6,000 each, Brazil and India with 4,000 each, and four countries with 3,000 each: Italy, South Korea, the Netherlands and Spain. The 149,900 international overnight visitors spent \$160.1 million, or \$1,068 per person, on average. Top three countries in spending: UK, \$18.8 million; China, \$18.4 million; and Japan, \$13.4 million.

INTERNATIONAL TRAVELERS



TRANSPORTATION

Travel party registrants provide Welcome Centers with trip-related data. Registrants are asked to provide their zip code, age range of party, number of visitors in their party and the reason for their visit. Of the 2,390,882 people serviced at Welcome Centers in FY 2017, 1,912,901 – or 80 percent – registered. Most were U.S. residents. FY 2017 international travelers comprised 57,864, or 3 percent of registrants, versus 66,364 international registrants in FY 2016, or 3.4 percent of all registrants.

U.S. registrants at Mississippi Welcome Centers decreased from 1,890,855 in FY 2016 to 1,855,037 in FY 2017, or -1.9 percent. The international segment decreased by 12.8 percent; and total registrants decreased 2.3 percent. Mississippi, Louisiana, Alabama, Texas, Florida and Georgia held the top six spots for U.S. travelers in FY 2017. Canada had the most international registrants, 16,650, or 28.8 percent, in FY 2017.

WELCOME CENTER RESERVATION SERVICE

The Welcome Center reservation service enables travel counselors to make reservations for travelers/visitors in any hotel/motel, bed-and-breakfast or

campground accepting reservations. This service completed its 23rd year of operation in June 2017 with \$43,188 in revenue, 391 reservations and 455 room nights booked.

REGIONAL AIRPORT/AIR PASSENGER DATA

Mississippi's regional/international airports reported 874,226 scheduled passenger boardings, from January 2017 to December 2017, a 0.6-percent decrease versus 879,310 in CY 2016.

The Jackson-Medgar Wiley Evers International Airport boarded 455,267 passengers, or 52.1 percent, of all CY 2017 passengers boarded in Mississippi. Its daily nonstop flights to cities and airports included Atlanta, Charlotte, Chicago, Dallas/Ft. Worth, Houston and Washington, D.C.

Gulfport-Biloxi International Airport had 333,087 boardings, CY 2017. They reported 230,267 annual revenue boardings, 776 charter flights and 94,042 charter passenger boardings between October 2016 and September 2017. Their carriers are American Airlines, Delta, United, Allegiant and Sun Country. Cities served were Atlanta, Charlotte,

Dallas-Ft. Worth, Houston, Minneapolis (seasonal) and Orlando Sanford (twice a week). Some \$9.56 million in FY 2017 net capital expenditures and improvements were made to the Gulfport-Biloxi International Airport. Other CY 2017 scheduled boardings for other regional airports: Golden Triangle (41,250), Meridian (19,594), Hattiesburg-Laurel (9,805), Tupelo (9,947) and Greenville Mid-Delta (5,276).

AMTRAK

Amtrak serves Mississippi with two long-distance trains: The City of New Orleans, with daily Chicago-New Orleans service via Jackson, and The Crescent, with daily New Orleans-Atlanta-New York service via Meridian. Ten Mississippi stations with Amtrak service include Brookhaven, Greenwood, Hattiesburg, Hazlehurst, Jackson, Laurel, McComb, Meridian, Picayune and Yazoo City. Total FY 2017 ridership in Mississippi was 101,542, down 2 percent from 103,562 in FY 2016. FY 2017 total U.S. Amtrak ridership was 31.7 million, or 1.5 percent above 31.3 million in FY 2016. Ridership is the sum of total passengers boarding and disembarking. Total Amtrak passenger FY 2017 revenue was \$3.2 billion, a 1.1 percent increase versus FY 2016.



The Welcome Center reservation service had **\$43,188 in revenue, 391 reservations and 455 room nights booked.**

GAMING

Mississippi had 28 state-licensed casinos on Feb. 1, 2018, including 12 on the Mississippi Gulf Coast; nine in the Northern Region (Tunica and Coahoma counties); seven in the Central Region (Greenville, Washington County, Natchez and Vicksburg).

Total FY 2017 state-licensed casino gross gaming revenues were \$2.09 billion, with \$1.395 billion, or 66.8 percent, as the estimated net traveler/visitor share. The estimated net traveler/visitor share of gross gaming revenue made up 22 percent of the \$6.343 billion in statewide travel and tourism expenditures by travelers.

Mississippi's FY 2017 gaming tax revenues were \$253.9 million: \$169 million in state receipts and \$84.9 million for cities/counties. Two-thirds of the total state/local gaming tax revenues were generated by tourism. Travel and tourism comprised \$112.8 million of \$169 million of state tax receipts and \$56.6 million of \$84.9 million of city/county tax receipts.

State tax receipts from gaming generated \$133 million for the General Fund and \$36 million to the Mississippi Department of Transportation. Gaming tax receipts generated via travel and tourism totaled \$88.5 million, accounting

State-licensed casino gross gaming revenues were **\$2.09 billion** in FY 2017, with \$1.395 billion, or 66.8 percent, as the estimated net traveler/visitor share.



Beau Rivage - Biloxi, Mississippi



MISSISSIPPI GAMING COMMISSION QUARTERLY SURVEY TRENDS

Some 60.7 percent of all FY 2017 statewide gaming patrons reside out-of-state, primarily Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per Mississippi Gaming Commission data. Tunica and Coahoma counties casinos in the Northern Region had 74.3 percent of out-of-state patrons, from Arkansas, Tennessee, Illinois, Missouri, Oklahoma and Alabama. About 28.1 percent of the Central Region – Greenville, Washington County, Natchez and Vicksburg – casino patrons came from out-of-state, e.g., Arkansas and Louisiana. Of the Coastal Region casino patrons, 63.4 percent lived out-of-state, e.g., Louisiana, Florida, Alabama, Georgia and Texas.

State-licensed casinos plus their hotels contributed an FY 2017 payroll of \$676.8 million, down 0.4 percent

for 66.5 percent of the gaming tax receipts going into the General Fund. Of travel and tourism's \$398.7 million total contribution to the General Fund, 22.2 percent came through gaming.

from FY 2016. FY 2017 advertising and promotional expenditures attributed to state-licensed casinos were \$93.4 million, an 8.4 percent decrease versus FY 2016. State-licensed casino hotel rooms increased from 11,343 in FY 2016 to 11,432 in FY 2017, or 0.8 percent. Hotel and convention facilities hosted 1,354 conferences in FY 2017 with 202,289 total delegates. Total FY 2017 ticketed show/concert attendees was 224,961, a 2.1-percent increase over 220,323 in FY 2016.

GAMING EMPLOYMENT, REVENUE AND VARIOUS TRENDS IN OTHER STATES

The 22,228 state-licensed casino employees and casino hotel employees made up 25.5 percent of 87,335 direct travel and tourism jobs, per FY 2017 quarterly casino employment data from Mississippi Department of Employment Security, Labor Market Information Department surveys. Mississippi's gaming expenditures by visitors declined by 3.8 percent in FY 2017, versus FY 2016.

New Jersey casinos, after losing money for a decade, now allow in-state bettors to log onto websites run by casinos. They were one of only three states, as of June 2017, which allowed this. Nevada and Delaware were the other two states. At least eight other states are considering legalizing casino-run online wagering. Gaming experts say this is a smart play for millennials, who prefer online gaming.

Per the UNLV Center for Gaming Research, these states

had gaming revenue declines for the first 10 months of 2017, versus the same period in 2016: Florida, -0.4 percent; Maine, -2.3 percent; Mississippi, -3.1 percent; Missouri, -0.6 percent; New York, -0.4 percent; Pennsylvania, -1.1 percent; Rhode Island, -1.1 percent; South Dakota, -0.2 percent; West Virginia, -7.2 percent. The U.S. overall showed a 2.8-percent increase in gaming revenue.


NON-GAMING SUMMARY OF REVENUE FOR STATE- LICENSED CASINOS

Room revenue at state-licensed casino hotels was \$245.2 million in FY 2017, an increase of 1.2 percent versus FY 2016. FY 2017 food and beverage revenue totaled \$301.4 million, flat versus \$301.2 million in FY 2016. FY 2017 other non-gaming revenue was \$109.4 million, or \$2.9 million above the \$106.5 million in FY 2016, a 2.7 percent increase. These non-gaming dollar amounts are significant, even though many lodging, food, beverage and other amenities/services are complimentary.

OUTDOOR RECREATION



Reunion Lake - Madison, Mississippi



Camping and recreational vehicle travel

play significant roles in Mississippi's travel and tourism economy.

The Mississippi Department of Wildlife, Fisheries and Parks, U.S. Army Corps of Engineers, Vicksburgs National Military Park, Natchez National Historical Park, Natchez Trace Parkway, Shiloh National Military Park/Corinth Site and Mississippi Final Stands Interpretive Center employment, payroll and revenue figures are in Appendices A-C (pages 20-22). Vicksburgs National Military Park had 510,234 visitors in FY 2016, the most recent figures available. Natchez National Historical Park had 204,332 recreation visits in CY 2016. The U.S. Army Corps of Engineers' 1.38 million total visits in FY 2016 were at Arkabutla, Enid, Grenada and Sardis Lakes. Shiloh National Military Park/Corinth Site had 21,000 visitors in FY 2017. Hunting, fishing and other wildlife-related activities entice visitors to Mississippi. Travel parties spend money on food, lodging, transportation, fuel, fishing and hunting equipment, auxiliary expenses and special equipment.

Camping and recreational vehicle travel play significant roles in Mississippi's travel and tourism economy. Mississippi houses 13,910 RV spaces with electricity and water and 1,932 camp sites without hook-up, per a 2017 survey. The Pearl River Valley Water Supply District (parts of Hinds, Leake, Madison,

Rankin and Scott counties) reported 2.5 million visitors in FY 2017. Mississippi's State Parks have 1,628 camp sites. State park visitation figures show a 12.4 percent decrease in FY 2017 visitation versus FY 2016. The Mississippi Department of Wildlife, Fisheries and Parks reported \$9.7 million in FY 2017 nonresident licensing sales versus \$9.24 million in FY 2016.



STATE TRAVEL AND TOURISM LINKS

TOURISM CAPITAL INVESTMENT FY 2017 SURVEYS (OCTOBER 2016 - SEPTEMBER 2017)

The combined FY 2017 tourism capital investment in the Jackson metropolitan statistical area was **\$65.9 million.**

Tourism capital investment valuation is based on commercial permits issued and tourism factors for new construction and expansion and/or renovation of tourism-related businesses and projects. Dollar amounts reflect estimated 12-month contract construction costs and permit fees, but not land acquisition costs, site prep, planning, casino or business equipment purchasing costs, condo flipping, furniture and fixtures. Many entities do not furnish data, and some data are not readily available. Tourism capital investment is a net travel and tourism estimate because it focuses on travel and tourism construction. For example, the Mississippi Department of Transportation spent \$6,373,877 to maintain Welcome Centers and rest areas.

Total estimated FY 2016 statewide tourism capital investment was \$255.1 million, based on data secured, and \$251.8 million in FY 2017, or \$3.3 million less – a

1.3-percent decrease. Approximately \$119.1 million, or 47.3 percent of FY 2017 tourism capital investment, was from private sources, while \$132.7 million, or 52.7 percent, came from federal, state and local government sources.

The Mississippi Gulf Coast accounted for \$59.4 million in FY 2017 tourism capital investment, or 23.6 percent of the state's total. Retail establishments, infrastructure (airport/highway), hotel projects, casino renovations, restaurants and others comprised this calculation.

The combined FY 2017 tourism capital investment in the Jackson metropolitan statistical area – including Copiah, Hinds, Madison, Rankin, Simpson and Yazoo counties – was \$65.9 million, with most of this in Hinds County at \$33.2 million and Rankin County at \$30.8 million. Projects included two new museums and a new hotel in Jackson; restaurants and retail; and permits for three new hotels in Flowood.

DeSoto County's \$7.24 million in tourism capital investment included new retail projects, restaurant remodeling and infrastructure. Tupelo's \$11.3 million for FY 2017 tourism capital investment covered a new

hotel, retail renovations/new retail, restaurants, new convenience stores/gas stations and infrastructure.

Oxford-Lafayette County tourism capital investment was \$10 million in restaurants, retail, recreation facilities and infrastructure. Starkville-Oktibbeha County tourism capital investment reached \$15.9 million, most of which was for Mississippi State University's Dudy Noble Field at Polk-DeMent Stadium. Marshall County had infrastructure-related work as part of \$4.9 million in tourism capital investment.

The Hattiesburg area, including Forrest, Lamar and Perry counties, had \$20.7 million in FY 2017 tourism capital investment, including midtown hotel development and restaurants. Meridian/Lauderdale County's FY 2017 tourism capital investment of \$12.5 million was mostly for the initial construction phase of the new Mississippi Arts and Entertainment Experience. Airport/highway infrastructure, restaurant and travel stop renovations comprised a much smaller construction portion.

Natchez had \$1 million in FY 2017 tourism capital investment, with antique store, retail and restaurant renovations. Vicksburg's \$2.2 million in FY 2017 tourism capital investment was primarily infrastructure.

FY 2017 tourism capital investment data were updated with input from city/county building/permit departments, Dodge Data Analytics and state agencies.

FILM PRODUCTIONS, DOCUMENTARIES AND COMMERCIALS

Nine independent features were filmed in Mississippi in CY 2017, along with four reality-based television series, one feature documentary and four national commercials.

All of these projects amounted to 518 days of actual production activity across the state, from Corinth to Picayune, Gulfport to Canton and Batesville to Greenville. An additional 216 preproduction and postproduction days brought the total to 734 days of overall production activity. The film and commercial industries spent an estimated \$5,651,000 with Mississippi businesses and had a combined payroll of \$2,828,000.

Production was scattered throughout Mississippi, with the Gulf Coast and South Mississippi being especially busy with seven feature productions and two reality-based shows. Most of the productions stemmed from producers who have previously worked in the state. Active Entertainment brought three more features in 2017 for a total of five projects on the Gulf Coast. Leverage Entertainment returned to do another feature in South Mississippi for a total of four projects. Running Wild Films made two more features for a total of four in the state. "Bring It!" filmed in Jackson for a fourth and fifth season in 2017, and "Home Town" completed their second season in Laurel. Farm Bureau Insurance and Sanderson Farms also came back to film commercials in the state.



FILMED IN MISSISSIPPI

9 FEATURES

BLOOD COUNTRY
CORNBREAD COSA NOSTRA
GLASS TALONS
CHRISTMAS IN MISSISSIPPI
MISSISSIPPI RIVER SHARKS
MY MOTHER'S MURDER
THE TEACHER
ULTRA
URBAN COUNTRY

4 REALITY BASED SHOWS

BRING IT
HOME TOWN
ML FISHING
NAKED & AFRAID

1 FEATURE DOCUMENTARY

UNTITLED CHAMBERS STORY

4 NATIONAL COMMERCIALS

COPPER FIT
FARM BUREAU INSURANCE
HURST REVIEW SERIES
SANDERSON FARMS

Film infrastructure diminished in 2017 with the closing of Mississippi Film Studios in Canton, Hollywood Trucks & Rentals and MBS Equipment. Red Planet Entertainment relocated to Georgia; Eyevox Entertainment/Mad Genius downsized their inventory; and freelance production crew members relocated.

The Mississippi Film Office supported the professional production alliances located in Jackson and on the Coast and provided programming support to statewide film festivals and related events. Indigenous filmmaking was directly supported by continuing to fund the Mississippi Emerging Filmmakers Grant Program administered by the Mississippi Film and Video Alliance.

STATE GROSS DOMESTIC PRODUCT, TOTAL VALUE ADDED

The state gross domestic product, part of the national GDP, is a comprehensive measure of economic output used by all 50 states, Washington D.C. and U.S. territories. Travel and tourism's share of GDP can be estimated via state-level travel and tourism accounts, a broader view focusing on the circular flow of goods and services in the economy between tourism industry supply and the impact of tourism commodity demand. Estimates include travel and tourism's statewide contribution as a direct percentage of state GDP, plus indirect and induced share of travel and tourism employment and labor income, effective tax rates for personal income tax, sales tax and other taxes, among other indicators.

The direct effects of total value added from Mississippi's statewide travel and tourism data were matched to their description in IMPLAN – a nationally recognized economic contribution model to estimate the economic activity associated with the sale of a good or service – for gasoline stations, lodging, food services and drinking establishments and other codes to estimate its direct value added as a portion of state GDP. Mississippi's GDP in current dollars was estimated at \$110 billion in FY 2017, per the Bureau of Economic Analysis and University Research Center, Mississippi Institutions of Higher Learning. Travel and tourism's 2.4 percent direct value added to GDP is lower than its 7.6 percent direct employment concentration and 7.4 percent share of General Fund revenues.

The direct portion only of food services and drinking establishments, lodging, casino gaming, gasoline stations/other retail, recreation and transportation were part of the travel and tourism industry GDP. Casino gaming, food services and drinking establishments and lodging were a major portion of this.

Mississippi had a 5 percent unemployment rate based on a 12-month moving average, January-December 2017, versus 5.9 percent for January - December 2016. December 2017 had a 4.6 percent seasonally adjusted unemployment rate, the lowest monthly rate at the time in the state's recorded history, from January 1976 forward. The civilian labor force was 1.286 million, with an average of 64,700 unemployed, CY 2017. Metropolitan Statistical Areas for counties with major travel and tourism activity had unemployment rates of 5.2 percent for Gulfport-Biloxi-Pascagoula

(Hancock, Harrison and Jackson counties); 4.4 percent for Hattiesburg (Forrest, Lamar and Perry counties); and 4.3 percent for Jackson (Copiah, Hinds, Madison, Rankin, Simpson and Yazoo counties). DeSoto County's CY 2017 unemployment rate was 3.8 percent, while Tunica County was 5.8 percent.

TRAVEL AND TOURISM EMPLOYMENT MULTIPLIERS

IMPLAN uses indirect (business or firm level) and induced (personal or individual level) multipliers. Together – direct plus indirect plus induced, then divided by the direct contribution – they estimate employment multipliers filtered through a social accounting matrix. Fiscal Year 2016 and FY 2017 employment multipliers for Mississippi were 1.43. The 86,600 statewide direct FY 2016 travel and tourism jobs resulted in an additional 37,580 indirect plus induced jobs. The 87,335 statewide FY 2017 direct travel and tourism jobs resulted in 37,345 indirect plus induced, or secondary, jobs. FY 2017 jobs associated with travel and tourism totaled 124,680, or 10.9 percent of nonfarm employment.

TRAVEL AND TOURISM LABOR INCOME MULTIPLIERS

Payroll or labor income earned by an employee results in additional money spent by the firm (indirect) and

individual (induced). The FY 2016 travel and tourism labor income multiplier for Mississippi was 1.61. The total labor income for FY 2016 was \$2.99 billion, made up of \$1.86 billion direct and \$1.13 billion in indirect and induced income. Mississippi's FY 2017 travel and tourism labor income multiplier was 1.58, with \$1.91 billion in direct and \$1.11 billion in indirect and induced or secondary income, for total labor income of \$3.02 billion. IMPLAN codes were used to compute these multipliers.

December 2017 had a **4.6 percent seasonally adjusted unemployment rate**, the lowest monthly rate at the time in the state's recorded history from January 1976 forward.

DELIMITATIONS

This study is delimited to travel and tourism businesses in Mississippi's 82 counties. Private, public, nonprofit and quasi-public firms directly/indirectly affected by travel and tourism are represented.

LIMITATIONS

This study should be interpreted only for Mississippi, and it is limited by the challenges of providing a comprehensive and local view of travel and tourism expenditures. Travel and tourism businesses cover a broad range of North American Industry Classification System codes. Assumptions were made for certain employment and revenue categories based on their travel and tourism links. These assumptions may be adjusted in light of future research. The study is limited by not having access to automotive gasoline sales for 79 of the state's 82 counties (statewide data are available and estimates are computed for some counties). The Department of Revenue's Petroleum Tax Division provides disbursements for the Hancock, Harrison and Jackson County Seawall Tax. This facilitates revenue data for these counties from net taxable gallons sold.

This study uses statewide employment and labor income multipliers from IMPLAN, but not county-level multipliers. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by cities/counties. Limitations at the county level include the difficulty in assigning percent figures in traveler/visitor sales as a proportion of total sales in a given county.

METHODS

This report estimated travel and tourism's FY 2017 statewide economic contribution, including the General Fund portion attributable to travel and tourism. County indicators include estimated travel and tourism jobs (direct only), expenditures and capital investment. Room/restaurant tax revenues are presented for pertinent cities and counties. Some counties have economies more geared to travel and tourism. Surveys, reports and other parameters were used to make these estimates.

Other trends – visitor profile/special survey data, Welcome Center highlights and airport passenger data – are covered. Surveys were secured for federal entities with an October to September fiscal year: Columbus office, Vicksburg headquarters-U.S. Army Corps of Engineers, Shiloh National Military Park/Corinth Site and Mississippi Final Stands Interpretive Center. Most of Mississippi's convention and visitor bureaus are on an October-September fiscal year, but the Department of Revenue compiles tax revenue information on a monthly and state fiscal year basis. They provided most of the statewide and county revenue figures and facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation, attractions, entertainment and recreation.

Mississippi Gaming Commission monthly surveys supply lodging data in state-licensed casino hotels and advertising expenditures. Other state agencies surveyed with a travel and tourism connection include the Mississippi Department of Wildlife, Fisheries and Parks, and the Pearl River Water Supply District.

FY 2017 employment and payroll data were calculated from quarterly figures compiled by the Mississippi Department of Employment Security, Labor Market Information Department. Other state, local and federal agencies, tourism offices and museums furnished employment/payroll survey data. Estimated statewide travel and tourism expenditures are included by category. Statewide petroleum purchases and revenues at the retail level were calculated via self-service unleaded gas price averages for regular, mid-grade and premium fuel reported by AAA's website. Sources for sales of petroleum products into Mississippi were MDA Energy Division, the Mississippi Department of Revenue and the Mississippi Department of Transportation. The Petroleum Tax Division of the Mississippi Department of Revenue provided sales/collections data for gasoline and undyed diesel fuel at 18 cents per gallon.

APPENDIX A

Estimated Travel and Tourism Direct Employment, FY 2016 and FY 2017

CATEGORY	FY 2016	FY 2017	CHANGE
Food services and drinking establishments (1)	30,082	30,800	2.4%
Lodging, excluding all casino hotels (2)	12,960	13,175	1.7%
Gaming, state-licensed casinos and hotels (3)	22,543	22,228	-1.4%
Retail trade (4)	10,067	10,139	0.7%
Support activities, air transportation (5)	1,583	1,719	8.6%
Air passenger, scheduled and chartered (5)	218	217	-0.5%
Scenic and sightseeing transportation	17	56	229.4%
Charter bus industry	112	114	1.8%
Taxi and limo service	40	48	20.0%
Amtrak, other bus transportation	73	70	-4.1%
Subtotal, transportation	2,043	2,224	8.9%
Travel arrangement/reservations	381	388	1.8%
Passenger car rental	400	388	-3.0%
Automotive repair and maintenance services	314	319	1.6%
Parking lots and garages	14	13	-7.1%
Advertising and related services	257	249	-3.1%
Laundry services	149	130	-12.8%
Subtotal, other services	1,515	1,487	-1.8%
Motion picture theaters	145	147	1.4%
Motion picture and video production	154	163	5.8%
Museums, historical sights and similar (6)	349	345	-1.1%
Performing arts, spectator sports and related	650	647	-0.5%
Amusement parks, bowling, golf courses, marinas	1,154	1,185	2.7%
Federal, state, local tourism agencies/offices (7)	726	652	-10.2%
Selected convention centers and arenas	92	92	none
Gaming, lodging, other at tribal resorts (8)	1,815	1,820	0.3%
Selected outdoor recreation (9)	520	516	-0.8%
Construction (10)	1,785	1,715	-3.9%
Total	86,600	87,335	0.8%

1. Alcohol/nonalcohol restaurants, drinking places, among other establishments.
2. Estimates based on Mississippi Department of Employment Security data for hotels/motels, other traveler accommodations and RV parks and recreational camps, some residential property managers. Excludes state-licensed casino and tribal casino/resort hotels.
3. Based on Mississippi Department of Employment Security, Labor Market Information Department and Mississippi Gaming Commission quarterly surveys; the data include state-licensed casinos and employees.
4. FY 2016 and FY 2017 Mississippi Department of Employment Security, Labor Market Information Department covered employment statewide data were used for the full-time equivalent figure. Includes gasoline stations; department stores; warehouse clubs and superstores; other general merchandise stores; gift, novelty and souvenir shops, antiques and secondhand stores; clothing and shoe stores; sporting goods and book stores; specialty food and grocery stores; tobacco stores; pharmacies and drug stores; tire dealers; florists; book stores and news dealers; RV dealers; motorcycle, boat and other motor vehicle dealers; automotive parts and accessory stores; tire dealers; jewelry, luggage and leather goods stores; electronics, camera and photographic stores.
5. Reflects non-cargo jobs only. Includes some federal and local government support jobs.
6. Includes Mississippi Department of Archives and History and Natural Sciences Museum data. Data precedes the opening of two museums in Jackson, Mississippi, December 2017.
7. Includes U.S. Army Corps of Engineers figures, Columbus and Vicksburg districts, plus the Natchez Trace Parkway, Vicksburg National Military Park, Natchez National Historical Park, Shiloh National Military Park/Corinth, Mississippi Final Stands Interpretive Center. Includes Visit Mississippi and Welcome Center staff, local Tourism Offices, other state agencies - Mississippi Arts Commission, Mississippi Gaming Commission and Pearl River Water Supply District. Convention center data are also included.
8. Estimates reflect estimated gaming and non-gaming employment at the tribal resort.
9. Includes some estimated agricultural tourism employment, outfitters, hunting and fishing guides. Mississippi Department of Wildlife, Fisheries and Parks, Parks Unit, are included.
10. Only reflects estimated travel and tourism-related construction activity.

SOURCES:

Convention and visitor bureaus and other tourism offices; Mississippi Arts Commission; Mississippi Department of Archives and History; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission; Mississippi Museum of Natural Science; Pearl River Water Supply District; U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg headquarters; U.S. Department of the Interior, National Park Service; Mississippi Final Stands Interpretive Center, Natchez National Historical Park, Shiloh National Military Park/Corinth, Natchez Trace Parkway, Vicksburg National Military Park; Visit Mississippi.

APPENDIX B

Estimated Travel and Tourism Direct Payroll, by Component, FY 2016 and FY 2017

CATEGORY	FY 2016	FY 2017	CHANGE
Food services and drinking establishments	\$414,570,794	\$435,799,893	5.1%
Lodging (1)	\$207,568,017	\$216,100,416	4.1%
Gaming (2)	\$679,541,480	\$676,788,839	-0.4%
Retail trade (3)	\$201,122,295	\$203,770,921	1.3%
Support activities, air transportation	\$68,333,180	\$82,359,045	20.5%
Air passenger, scheduled and chartered	\$8,502,874	\$8,349,490	-1.8%
Scenic and sightseeing transportation	\$574,872	\$1,261,824	119.5%
Charter bus industry	\$2,920,269	\$3,150,815	7.9%
Taxi and limo service	\$817,589	\$841,495	2.9%
Amtrak transportation	\$5,118,755	\$5,079,889	-0.8%
Subtotal, transportation	\$86,267,539	\$101,042,558	17.1%
Travel arrangement/reservations	\$11,593,648	\$11,260,578	-2.9%
Passenger car rental	\$9,291,254	\$9,654,561	3.9%
Automotive repair and maintenance services	\$10,762,324	\$11,211,753	4.2%
Parking lots and garages	\$204,666	\$209,759	2.5%
Advertising and related services	\$9,321,479	\$9,304,683	-0.2%
Laundry services	\$3,083,423	\$2,866,100	-7.0%
Subtotal, other services	\$44,256,794	\$44,507,434	0.6%
Motion picture theaters	\$1,524,774	\$1,515,610	-0.6%
Motion picture and video production	\$6,481,374	\$8,946,397	38.0%
Museums, historical sights and similar	\$10,014,091	\$10,282,886	2.7%
Performing arts, spectator sports, related	\$14,181,536	\$14,801,592	4.4%
Amusement parks, bowling, golf courses, marinas	\$19,158,666	\$20,347,360	6.2%
Selected convention centers and arenas	\$2,274,000	\$2,655,600	16.8%
Federal, state, local tourism agencies (4)	\$40,285,723	\$40,229,677	-0.1%
Gaming, lodging, other at tribal resorts (5)	\$55,000,000	\$56,000,000	1.8%
Selected outdoor recreation (6)	\$9,023,522	\$9,246,071	2.5%
Construction (7)	\$69,734,006	\$67,033,281	-3.9%
Total	\$1,861,004,611	\$1,909,068,535	2.6%

Note: These are nominal dollar amounts NOT adjusted for inflation.

- Does not include the payroll of state-licensed casino hotels, nor Pearl River Resort casino hotels.
- Includes the payroll of all work permitted and non-work permitted employees at state-licensed casinos, plus casino hotels, but not the estimated payroll of Pearl River Resort casino employees. State-licensed casino payroll data reflect July 2015 - June 2016 and July 2016 - June 2017 timeframes.
- Includes gasoline stations; department stores; warehouse clubs and superstores; other general merchandise stores; gift, novelty and souvenir shops, antiques and secondhand stores; clothing and shoe stores; sporting goods and book stores; specialty food and grocery stores; tobacco stores; pharmacies and drug stores; florists; book stores and news dealers; RV dealers; motorcycle, boat and other motor vehicle dealers; automotive parts and accessory stores; tire dealers; jewelry, luggage and leather goods stores; electronics, camera and photographic stores.
- Includes U.S. Army Corps of Engineers figures, Columbus and Vicksburg districts, plus the Natchez Trace Parkway, Vicksburg National Military Park, Natchez National Historical Park, Shiloh National Military Park/Corinth, Mississippi Final Stands Interpretive Center. Includes Visit Mississippi and Welcome Center staff, local tourism offices, other State Agencies - Mississippi Arts Commission, Mississippi Gaming Commission, Pearl River Basin Development District and Pearl River Water Supply District. Mississippi Department of Archives and History data are also included.
- Only reflects estimated payroll at tribal resort gaming and tribal non-gaming venues.
- Includes some estimated agricultural tourism employment, campgrounds, hunting and fishing. Includes Mississippi Department of Wildlife, Fisheries and Parks - Parks Unit and Pat Harrison Waterway estimates.
- Only reflects estimated travel and tourism-related construction activity.

SOURCES:

Convention and visitor bureaus and other tourism offices; Mississippi Arts Commission; Mississippi Department of Archives and History; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission; Mississippi Museum of Natural Science; Pearl River Water Supply District; U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg headquarters; U.S. Department of the Interior, National Park Service: Mississippi Final Stands Interpretive Center, Natchez National Historical Park, Shiloh National Military Park/Corinth, Natchez Trace Parkway, Vicksburg National Military Park; Visit Mississippi.

APPENDIX C

Estimated Travel and Tourism Expenditures by Visitors, FY 2016 and FY 2017

CATEGORY	FY 2016	FY 2017	CHANGE
Food services and drinking establishments (1)	\$1,195,397,212	\$1,234,810,711	3.3%
Specialty food, liquor stores and vending machines	\$132,620,778	\$118,884,127	-10.4%
Lodging (2)	\$935,859,847	\$960,970,032	2.7%
Gaming (3)	\$1,450,118,988	\$1,395,229,616	-3.8%
All retail, excluding gasoline/service stations (4)	\$1,666,474,612	\$1,683,215,185	1.0%
Gasoline/service stations, convenience stores with fuel	\$660,655,318	\$718,759,839	8.8%
Fixed facilities, air transportation (5)	\$5,859,308	\$5,813,890	-0.8%
Passenger car rental leasing	\$34,475,178	\$54,536,302	58.2%
Auto repair shops, accessories, mechanics, car wash	\$57,171,215	\$59,230,187	3.6%
Rail and water passenger transportation (6)	\$10,675,468	\$11,260,036	5.5%
Entertainment/athletic events/outdoor recreation (7)	\$84,332,357	\$95,285,437	13.0%
Consumer goods rental	\$56,882,547	NA	NA
Advertising specialties	\$1,048,779	NA	NA
Laundries, dry cleaning	\$5,278,286	\$4,979,285	-5.7%
Total	\$6,296,849,893	\$6,342,974,647	0.7%

Note: These are nominal dollar amounts NOT adjusted for inflation.

1. Includes all restaurants and drinking places.
2. The FY 2016 and FY 2017 lodging figures reflected some adjustments, based on STR monthly survey data for Mississippi cities/regions.
3. Net travel/visitor gross gaming revenues for 28 state-licensed casinos in FY2016 and 28 in FY 2017.
4. Includes department and general merchandise stores, warehouse clubs-supercenters; apparel and accessories; miscellaneous retail; gift, novelty and souvenir; sporting goods; book and musical instrument stores; electronics, camera and photographic stores; antique (used merchandise) stores; cigar stores and stands; drug stores; gaming retail; specialty food, liquor stores, supermarkets and grocery stores; RV dealers, motorcycle, boat and other motor vehicle dealers; jewelry; florists; pharmacies and drugstores; tobacco stores; automotive parts and accessories stores; tire dealers. Excludes gasoline and diesel fuel at 18 cents; gasoline service stations/convenience stores.
5. Air transportation, air terminal, transportation services. Includes gross airport non-operating revenues for FY 2016 and FY 2017, based on scheduled/charter passenger service and passenger facility charges. Incomplete data for FY 2016 and FY 2017.
6. Amtrak ticket sales included for both FY2016 and FY2017.
7. The entertainment/recreation component includes: motion picture theaters; museums; spectator sports; racetracks; zoos and botanical gardens; amusement and theme parks; golf courses; bowling centers; marinas; all other amusement and recreation industry, such as major university sporting events ticket sales to persons residing at least 50 miles or more from the venue.

SOURCES:

American Automobile Association web site; Amtrak Station revenue e-searches; Mississippi Department of Revenue; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Development Authority Energy Division; Mississippi Gaming Commission; STR monthly survey data for Mississippi cities/regions; U.S. Army Corps of Engineers: Bay Springs Site; Columbus Office; Vicksburg Headquarters; U.S. Department of the Interior, National Park Service: Mississippi Final Stands Interpretive Center, Natchez National Historical Park, Shiloh National Military Park/Corinth Site, Vicksburg National Military Park; Visit Mississippi.

APPENDIX D

Estimated Travel and Tourism General Fund Revenue, FY 2016 and FY 2017

CATEGORY	FY 2016	FY 2017	CHANGE
Food services and drinking establishments	\$50,028,000	\$51,651,755	3.2%
Specialty food, liquor stores, vending machines	\$5,485,363	\$4,989,165	-9.0%
Lodging (1)	\$37,900,000	\$38,950,000	2.8%
State-licensed casino gaming (2)	\$92,000,000	\$88,500,000	-3.8%
All retail, including convenience stores (3)	\$69,421,622	\$70,210,260	1.1%
Rental and leasing, other transportation (4)	\$1,611,461	\$2,192,276	36.0%
Auto repair shops, accessories, mechanics, car wash	\$2,399,840	\$2,469,106	2.9%
Entertainment/outdoor recreation (5)	\$2,466,919	\$3,227,195	30.8%
Advertising specialties	\$63,283	NA	NA
Laundries, dry cleaning	\$221,658	\$210,755	-4.9%
Construction activity tax (6)	\$4,963,350	\$4,900,000	-1.3%
Personal income/sales tax (7)	\$103,699,334	\$106,616,093	2.8%
Alcoholic beverages (8)	\$15,466,247	\$15,499,623	0.2%
Use tax (9)	\$9,372,127	\$9,233,893	-1.5%
Total	\$395,099,204	\$398,650,121	0.9%

Note: All dollar amounts are the estimated "net" travel and tourism portion.

1. STR statewide and city data were used for this estimate. FY 2016 figure was adjusted plus \$800,000, or 2.2 percent.
2. Approximately \$88 million, or 66.7 percent of the \$132 million in General Fund gaming fees and tax transfers, were the "net" travel and tourism portion. The other \$44 million, or 33.3 percent, were not attributed to travel and tourism. This does not include \$36 million diverted to MDOT's Bond Sinking Fund, \$3 million per month.
3. Includes department and general merchandise stores, warehouse clubs-supercenters; apparel and accessories; miscellaneous retail; gift, novelty and souvenir; sporting goods; book and musical instrument stores; electronics, camera and photographic stores; antique (used merchandise) stores; cigar stores and stands; drugstores; gaming retail; gasoline service stations/convenience stores; specialty foods, liquor stores, supermarkets and grocery stores; RV dealers, motorcycle, boat and other motor vehicle dealers; jewelry; florists; pharmacies and drugstores; tobacco stores; automotive parts and accessory stores; tire dealers.
4. Also includes: transportation services, fixed facilities-air transportation, water passenger transportation.
5. The entertainment/recreation component includes: motion picture theaters; museums; spectator sports; racetracks; zoos and botanical gardens; amusement and theme parks; golf courses; bowling centers; marinas; all other amusement and recreation industry.
6. The estimated travel and tourism-related portion of the General Fund based on tourism capital investment. The FY 2016 figure was adjusted downward.
7. The estimated travel and tourism-related portion of the General Fund amount, based on estimated effective tax rates for personal income, sales tax and all other taxes.
8. The FY 2017 estimate comprised 87.3 percent of the total transfers to the General Fund and also applying a travel and tourism factor.
9. The FY 2017 estimate comprised 75.4 percent of the total transfers to the General Fund and also applying a travel and tourism factor.

SOURCES:

Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Development Authority Energy Division; STR monthly survey data for Mississippi cities/regions; University Research Center, Mississippi Public Universities; Visit Mississippi.

APPENDIX E

Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2016

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Adams	\$110,807,342	2,275	20.4	\$11,424,161	\$2,572,253
Alcorn	\$61,558,708	790	6.7	\$5,076,778	\$375,825
Amite	\$1,868,248	25	1.5	\$184,851	\$81,564
Attala	\$17,675,318	235	5.2	\$1,321,853	\$734,602
Benton	\$880,419	12	0.9	\$83,401	\$51,506
Bolivar	\$48,981,351	630	5.3	\$4,488,641	\$441,190
Calhoun	\$3,519,142	46	1.6	\$302,244	\$360,208
Carroll	\$867,557	12	1.1	\$87,143	\$293,884
Chickasaw	\$5,731,761	77	1.4	\$450,643	\$103,250
Choctaw	\$1,231,039	17	0.6	\$107,977	\$87,016
Claiborne	\$3,196,526	44	1.2	\$297,217	\$124,746
Clarke	\$4,303,407	60	2.0	\$353,503	\$215,525
Clay	\$19,179,765	260	5.0	\$1,622,016	\$445,624
Coahoma	\$65,990,487	955	12.0	\$7,507,446	\$815,365
Copiah	\$8,764,952	115	1.6	\$677,450	\$97,080
Covington	\$9,917,385	135	2.7	\$800,248	\$695,767
DeSoto	\$335,776,712	4,400	7.7	\$31,835,325	\$4,416,845
Forrest (4)	\$273,674,739	4,200	6.7	\$24,324,678	\$23,824,338
Franklin	\$1,233,772	17	1.1	\$128,447	\$128,926
George	\$10,458,310	145	2.9	\$794,563	\$276,193
Greene	\$2,102,830	28	1.5	\$199,459	\$254,588
Grenada	\$49,136,078	750	7.0	\$4,231,610	\$116,250
Gulf Coast (5)	\$1,989,110,347	26,000	16.9	\$225,915,187	\$81,036,614
Hinds	\$361,697,251	6,940	5.3	\$35,913,954	\$39,847,928
Holmes	\$3,489,443	48	1.3	\$310,009	\$233,550
Humphreys	\$2,270,679	30	1.5	\$206,573	\$126,469

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Issaquena	\$147,720	2	1.4	\$15,084	\$1,049
Itawamba	\$15,497,950	205	3.1	\$1,358,248	\$176,908
Jasper	\$3,316,358	45	1.2	\$293,502	\$287,494
Jefferson	\$1,031,210	14	1.1	\$107,583	\$151,774
Jefferson Davis	\$2,675,842	36	2.2	\$239,307	\$0
Jones	\$59,622,938	850	2.9	\$5,351,927	\$2,139,267
Kemper	\$1,636,335	23	0.8	\$168,712	\$14,137
Lafayette	\$153,666,553	2,000	8.9	\$13,206,007	\$21,913,805
Lamar (4)					
Lauderdale	\$163,398,853	2,040	5.9	\$14,397,098	\$5,042,098
Lawrence	\$2,982,939	38	1.5	\$264,824	\$73,842
Leake	\$8,452,909	120	2.4	\$688,559	\$570,580
Lee	\$261,995,526	3,910	7.1	\$23,219,899	\$4,263,661
Leflore	\$50,580,536	745	5.4	\$3,873,594	\$1,789,768
Lincoln	\$38,021,187	510	4.3	\$3,138,061	\$192,770
Lowndes	\$118,402,730	1,545	6.0	\$10,642,600	\$2,033,507
Madison	\$231,632,182	3,000	5.2	\$18,997,473	\$3,623,595
Marion	\$12,610,416	155	1.9	\$952,303	\$39,158
Marshall	\$15,580,508	220	3.5	\$1,196,473	\$2,695,143
Monroe	\$17,316,945	240	2.4	\$1,328,746	\$1,021,891
Montgomery	\$10,765,000	150	5.9	\$965,533	\$1,239,136
Neshoba (6)	\$36,609,099	2,000	16.2	\$2,845,027	\$191,704
Newton	\$6,722,176	90	1.5	\$510,901	\$115,759
Noxubee	\$5,508,272	72	2.9	\$471,630	\$324,329
Oktibbeha	\$97,921,562	1,335	6.0	\$8,748,349	\$21,247,963

APPENDIX E - CONTINUED

Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2016

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Panola	\$49,384,366	660	5.9	\$4,222,920	\$334,121
Pearl River	\$31,178,230	415	4.1	\$2,620,641	\$520,940
Perry (4)					
Pike	\$41,258,846	580	3.9	\$3,718,974	\$710,668
Pontotoc	\$11,177,078	135	1.1	\$878,741	\$182,407
Prentiss	\$7,918,218	105	1.4	\$604,818	\$198,390
Quitman	\$1,048,208	15	1.4	\$111,224	\$72,779
Rankin	\$252,209,181	3,400	5.1	\$23,588,196	\$16,338,493
Scott	\$20,805,875	280	2.2	\$1,601,459	\$731,642
Sharkey	\$1,431,026	20	1.9	\$124,117	\$0
Simpson	\$21,311,936	285	3.9	\$1,619,841	\$109,063
Smith	\$2,134,341	28	1.0	\$174,559	\$0
Stone	\$12,970,104	175	4.5	\$1,048,890	\$153,845
Sunflower	\$14,529,614	195	2.3	\$1,293,842	\$643,992
Tallahatchie	\$2,005,086	28	0.9	\$194,782	\$0
Tate	\$11,011,510	150	2.7	\$914,699	\$885,314
Tippah	\$7,980,882	105	1.8	\$691,033	\$505,775
Tishomingo	\$15,831,626	210	3.5	\$1,228,413	\$0
Tunica	\$556,989,166	5,800	62.2	\$69,871,341	\$483,542
Union	\$21,934,649	290	2.7	\$2,035,860	\$379,498
Walthall	\$2,498,077	34	1.4	\$249,939	\$129,894
Warren	\$203,822,874	3,950	19.2	\$22,121,458	\$1,415,522
Washington	\$87,070,747	1,465	8.5	\$9,378,151	\$2,237,396
Wayne	\$8,193,643	110	2.3	\$636,727	\$126,763
Webster	\$2,491,618	34	1.8	\$219,320	\$224,819

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Wilkinson	\$3,086,200	45	2.5	\$276,449	\$272,964
Winston	\$17,364,225	240	5.2	\$1,377,323	\$518,815
Yalobusha	\$3,884,239	50	1.6	\$302,381	\$211,665
Yazoo	\$14,903,475	205	3.2	\$1,417,803	\$800,000
Other (7)	\$160,905,539			\$14,833,287	
Total	\$6,296,849,893	86,600	7.6%	\$638,984,005	\$255,094,751

1. These are nominal dollar amounts; not adjusted for inflation. Appendix E reflects July 2015 - June 2016 data.
2. The travel and tourism employment percentage equals the estimated direct tourism jobs divided by the county level establishment based nonfarm employment. Data are based on where the employees work, not where they reside. Travel and tourism employment estimates are lower than the leisure and hospitality figures.
3. Estimated state/local travel and tourism taxes from travel/visitor expenditures and other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; seawall and city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees and excise taxes; beer/wine taxes; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.
4. Lamar and Perry counties data included with Forrest County as Hattiesburg Area.
5. Gulf Coast reflects combined data for Hancock, Harrison and Jackson counties.
6. Neshoba County employment figures reflect estimated Pearl River Resort employment from separate sources. Pearl River Resort travel and tourism expenditures by visitors: not available. Estimated tourism capital investment is based on data from sources responding to the survey.
7. Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the nonresident license sales by the Mississippi Department of Wildlife, Fisheries and Parks (under fees) and use taxes. Sales and tax collections not traced to specific counties, are included. Appendix E has estimated travel and tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX F

Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Adams	\$110,283,299	2,275	20.8	\$10,753,434	\$1,000,959
Alcorn	\$60,927,617	785	5.4	\$5,032,875	\$37,706
Amite	\$1,652,526	24	1.5	\$160,832	\$131,354
Attala	\$17,267,583	235	5.1	\$1,326,076	\$978,634
Benton	\$855,253	12	0.9	\$82,536	\$1,384
Bolivar	\$51,644,321	650	5.4	\$4,659,789	\$3,351,961
Calhoun	\$3,278,989	45	1.6	\$275,927	\$271,937
Carroll	\$682,986	10	0.9	\$74,933	\$343,324
Chickasaw	\$5,309,438	75	1.4	\$429,594	\$103,250
Choctaw	\$1,068,520	15	0.7	\$97,079	\$0
Claiborne	\$3,018,967	44	1.2	\$276,502	\$0
Clarke	\$4,065,456	57	2.0	\$330,931	\$532,331
Clay	\$19,709,958	265	5.0	\$1,671,939	\$399,828
Coahoma	\$64,682,512	945	12.2	\$7,457,946	\$1,402,413
Copiah	\$7,979,159	110	1.5	\$614,665	\$272,130
Covington	\$9,846,643	135	2.7	\$798,279	\$1,270,674
DeSoto	\$344,489,848	4,475	7.4	\$32,703,790	\$7,240,581
Forrest (4)	\$278,090,099	4,270	6.7	\$25,759,988	\$20,714,714
Franklin	\$1,075,567	15	1.0	\$115,564	\$227,455
George	\$10,188,195	145	2.9	\$763,286	\$365,518
Greene	\$1,788,028	25	1.3	\$170,089	\$528,445
Grenada	\$49,622,844	760	6.9	\$4,264,374	\$210,362
Gulf Coast (5)	\$2,041,493,419	26,600	17.3	\$233,063,095	\$59,380,106
Hinds	\$361,888,895	6,940	5.3	\$36,323,457	\$33,210,372
Holmes	\$3,045,332	45	1.3	\$271,270	\$1,839,334
Humphreys	\$2,117,860	30	1.5	\$189,821	\$22,626
Issaquena	\$120,560	2	1.4	\$11,673	\$158,213
Itawamba	\$16,397,336	225	3.4	\$1,373,939	\$768,498

APPENDIX F - CONTINUED

Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Jasper	\$2,944,815	40	1.1	\$256,385	\$185,285
Jefferson	\$945,209	13	1.0	\$102,759	\$38,640
Jefferson Davis	\$2,451,357	35	2.1	\$216,821	\$103,904
Jones	\$60,943,936	860	3.0	\$5,405,948	\$679,727
Kemper	\$1,461,956	22	0.8	\$148,958	\$21,432
Lafayette	\$174,182,732	2,200	9.2	\$15,378,901	\$10,066,499
Lamar (4)					
Lauderdale	\$159,483,512	1,990	5.8	\$14,764,730	\$12,450,633
Lawrence	\$2,691,963	38	1.5	\$227,641	\$0
Leake	\$7,920,425	115	2.4	\$656,151	\$472,116
Lee	\$263,893,916	3,925	7.0	\$23,231,894	\$11,268,922
Leflore	\$50,702,657	745	5.4	\$3,891,836	\$1,183,727
Lincoln	\$37,447,390	500	4.2	\$3,193,232	\$0
Lowndes	\$114,237,534	1,525	5.9	\$10,842,105	\$527,318
Madison	\$236,112,378	3,040	5.2	\$18,792,957	\$1,270,701
Marion	\$12,056,334	155	1.9	\$900,139	\$82,945
Marshall	\$15,864,277	220	3.5	\$1,316,993	\$4,947,857
Monroe	\$16,979,463	235	2.4	\$1,262,536	\$1,254,598
Montgomery	\$11,556,775	155	6.2	\$1,007,995	\$93,058
Neshoba (6)	\$36,028,487	1,975	16.2	\$3,059,943	\$338,379
Newton	\$6,436,984	90	1.6	\$506,396	\$29,454
Noxubee	\$5,008,195	70	2.6	\$425,535	\$0
Oktibbeha	\$100,073,163	1,360	6.1	\$8,838,992	\$15,899,310
Panola	\$49,028,172	660	6.0	\$4,162,688	\$992,864
Pearl River	\$30,591,265	410	4.0	\$2,524,390	\$456,946
Perry (4)					
Pike	\$41,824,777	585	4.0	\$3,873,274	\$1,555,702
Pontotoc	\$11,407,606	150	1.1	\$864,998	\$801,257

County	Travel and Tourism Expenditures by Visitors (1)	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (2)	State/Local Taxes/Fees Attributed to Tourism (3)	Tourism Capital Investment
Prentiss	\$7,827,945	105	1.4	\$592,126	\$643,650
Quitman	\$901,515	13	1.3	\$103,500	\$1,410,053
Rankin	\$257,464,410	3,440	5.1	\$25,242,796	\$30,801,769
Scott	\$20,599,298	280	2.1	\$1,568,580	\$361,944
Sharkey	\$1,271,172	18	1.8	\$113,415	\$2,839,973
Simpson	\$21,680,018	285	3.9	\$1,648,858	\$365,609
Smith	\$1,957,983	28	1.0	\$162,688	\$163,692
Stone	\$13,680,875	185	4.7	\$1,242,438	\$486,076
Sunflower	\$15,808,380	220	2.7	\$1,305,228	\$187,747
Tallahatchie	\$1,854,131	26	0.8	\$177,729	\$636,382
Tate	\$10,962,750	150	2.6	\$881,757	\$1,263,357
Tippah	\$7,917,962	105	1.8	\$650,137	\$478,973
Tishomingo	\$15,682,845	210	3.3	\$1,223,552	\$279,010
Tunica	\$514,173,224	5,545	62.0	\$62,975,893	\$400,000
Union	\$21,974,822	290	2.7	\$2,045,597	\$426,284
Walthall	\$2,411,828	34	1.4	\$207,629	\$18,747
Warren	\$204,449,881	3,925	19.2	\$22,721,631	\$2,163,839
Washington	\$87,536,093	1,465	8.5	\$9,548,680	\$296,660
Wayne	\$7,750,256	110	2.3	\$597,835	\$742,971
Webster	\$2,356,433	34	1.8	\$205,581	\$33,344
Wilkinson	\$3,075,435	45	2.6	\$272,376	\$259,796
Winston	\$16,835,037	235	5.1	\$1,307,167	\$311,266
Yalobusha	\$3,576,080	50	1.6	\$289,414	\$595,568
Yazoo	\$15,362,621	210	3.2	\$1,445,833	\$763,771
Other (7)	\$160,997,165			\$14,848,978	\$6,373,877
Total	\$6,342,974,647	87,335	7.6%	\$646,287,298	\$251,789,741

APPENDIX F - CONTINUED

Estimated County Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

1. These are nominal dollar amounts not adjusted for inflation. Appendix F reflects July 2016 - June 2017 data.
2. The travel and tourism employment percentage equals the estimated direct tourism jobs divided by the county level establishment based nonfarm employment. Data are based on where the employees work, not where they reside. Travel and tourism employment estimates are lower than the leisure and hospitality figures.
3. Estimated state/local travel and tourism taxes from travel/visitor expenditures and other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; seawall and city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental tax and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees and excise taxes; beer/wine taxes; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.
4. Lamar and Perry counties data included with Forrest County as Hattiesburg Area.
5. Gulf Coast reflects combined data for Hancock, Harrison and Jackson counties.
6. Neshoba County employment figures do reflect estimated Pearl River Resort employment - rough estimate - from separate sources. Pearl River Resort Travel and Tourism expenditures by visitors: not available. Estimated tourism capital investment is based on data from sources responding to the survey.
7. Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the nonresident license sales by the Mississippi Department of Wildlife, Fisheries & Parks (under fees) and use taxes. Sales and tax collections not traced to specific counties are included. Appendix F has estimated travel and tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX G

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: Visit Mississippi.

APPENDIX H

Capital/River Region Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

THE CAPITAL/ RIVER REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (1)	State and Local Taxes Attributed to Travel and Tourism (2)	Tourism Capital Investment
Adams	\$110,283,299	2,275	20.8	\$10,753,434	\$1,000,959
Amite	\$1,652,526	24	1.5	\$160,832	\$131,354
Claiborne	\$3,018,967	44	1.2	\$276,502	\$0
Copiah	\$7,979,159	110	1.5	\$614,665	\$272,130
Franklin	\$1,075,567	15	1.0	\$115,564	\$227,455
Hinds	\$361,888,895	6,940	5.3	\$36,323,457	\$33,210,372
Jefferson	\$945,209	13	1.0	\$102,759	\$38,640
Lawrence	\$2,691,963	38	1.5	\$227,641	\$0
Lincoln	\$37,447,390	500	4.2	\$3,193,232	\$0
Madison	\$236,112,378	3,040	5.2	\$18,792,957	\$1,270,701
Pike	\$41,824,777	585	4.0	\$3,873,274	\$1,555,702
Rankin	\$257,464,410	3,440	5.1	\$25,242,796	\$30,801,769
Simpson	\$21,680,018	285	3.9	\$1,648,858	\$365,609
Walthall	\$2,411,828	34	1.4	\$207,629	\$18,747
Warren	\$204,449,881	3,925	19.2	\$22,721,631	\$2,163,839
Wilkinson	\$3,075,435	45	2.6	\$272,376	\$259,796
Regional Totals	\$1,294,001,702	21,313	6.2	\$124,527,607	\$71,317,073

Does not include diesel fuel sales, or nonresident licensing fees, or 83rd Division sales. Gasoline sales at the pump are included for some counties.

1. The travel and tourism employment percentage equals the estimated direct tourism jobs divided by the county level establishment based nonfarm employment. Data are based on where the employees work, not where they reside.
2. Estimated state/local travel and tourism taxes from travel/visitor expenditures and some other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX I

Coastal Region Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

THE COASTAL REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (1)	State and Local Taxes Attributed to Travel and Tourism (2)	Tourism Capital Investment
Covington	\$9,846,643	135	2.7	\$798,279	\$1,270,674
Forrest (3)	\$278,090,099	4,270	6.7	\$25,759,988	\$20,714,714
George	\$10,188,195	145	2.9	\$763,286	\$365,518
Greene	\$1,788,028	25	1.3	\$170,089	\$528,445
Gulf Coast (4)	\$2,041,493,419	26,600	17.3	\$233,063,095	\$59,380,106
Jefferson Davis	\$2,451,357	35	2.1	\$216,821	\$103,904
Jones	\$60,943,936	860	3.0	\$5,405,948	\$679,727
Lamar (3)					
Marion	\$12,056,334	155	1.9	\$900,139	\$82,945
Pearl River	\$30,591,265	410	4.0	\$2,524,390	\$456,946
Perry (3)					
Stone	\$13,680,875	185	4.7	\$1,242,438	\$486,076
Wayne	\$7,750,256	110	2.3	\$597,835	\$742,971
Regional Totals	\$2,468,880,407	32,930	11.5	\$271,442,308	\$84,812,026

Does not include diesel fuel sales, nonresident licensing fees, or 83rd Division sales. Includes gasoline sales at the pump for Hancock, Harrison, Jackson and some other counties.

1. The travel and tourism employment percentage equals the estimated direct travel and tourism jobs/county establishment-based nonfarm employment. Data are based on where the employees work, not where they reside.
2. Estimated state/local travel and tourism taxes from travel/visitor expenditures and some other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.
3. Lamar and Perry counties data are included with Forrest County as the tri-county Hattiesburg Area.
4. Gulf Coast reflects combined data for Hancock, Harrison and Jackson counties.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX J

Delta Region Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

THE DELTA REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (1)	State and Local Taxes Attributed to Travel and Tourism (2)	Tourism Capital Investment
Bolivar	\$51,644,321	650	5.4	\$4,659,789	\$3,351,961
Carroll	\$682,986	10	0.9	\$74,933	\$343,324
Coahoma	\$64,682,512	945	12.2	\$7,457,946	\$1,402,413
Holmes	\$3,045,332	45	1.3	\$271,270	\$1,839,334
Humphreys	\$2,117,860	30	1.5	\$189,821	\$22,626
Issaquena	\$120,560	2	1.4	\$11,673	\$158,213
Leflore	\$50,702,657	745	5.4	\$3,891,836	\$1,183,727
Quitman	\$901,515	13	1.3	\$103,500	\$1,410,053
Sharkey	\$1,271,172	18	1.8	\$113,415	\$2,839,973
Sunflower	\$15,808,380	220	2.7	\$1,305,228	\$187,747
Tallahatchie	\$1,854,131	26	0.8	\$177,729	\$636,382
Tunica	\$514,173,224	5,545	62.0	\$62,975,893	\$400,000
Washington	\$87,536,093	1,465	8.5	\$9,548,680	\$296,660
Yazoo	\$15,362,621	210	3.2	\$1,445,833	\$763,771
Regional Totals	\$809,903,364	9,924	11.5	\$92,227,546	\$14,836,184

Does not include diesel fuel sales, nonresident licensing fees, or 83rd Division sales. Includes gasoline sales at the pump for some counties.

1. The travel and tourism employment percentage equals the estimated direct travel and tourism jobs/county establishment-based nonfarm employment. Data are based on where the employees work, not where they reside.
2. Estimated state and local travel and tourism taxes from travel/visitor expenditures and some other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX K

Hills Region Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

THE HILLS REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (1)	State and Local Taxes Attributed to Travel and Tourism (2)	Tourism Capital Investment
Alcorn	\$60,927,617	785	5.4	\$5,032,875	\$37,706
Benton	\$855,253	12	0.9	\$82,536	\$1,384
Calhoun	\$3,278,989	45	1.6	\$275,927	\$271,937
DeSoto	\$344,489,848	4,475	7.4	\$32,703,790	\$7,240,581
Grenada	\$49,622,844	760	6.9	\$4,264,374	\$210,362
Itawamba	\$16,397,336	225	3.4	\$1,373,939	\$768,498
Lafayette	\$174,182,732	2,200	9.2	\$15,378,901	\$10,066,499
Lee	\$263,893,916	3,925	7.0	\$23,231,894	\$11,268,922
Marshall	\$15,864,277	220	3.5	\$1,316,993	\$4,947,857
Panola	\$49,028,172	660	6.0	\$4,162,688	\$992,864
Pontotoc	\$11,407,606	150	1.1	\$864,998	\$801,257
Prentiss	\$7,827,945	105	1.4	\$592,126	\$643,650
Tate	\$10,962,750	150	2.6	\$881,757	\$1,263,357
Tippah	\$7,917,962	105	1.8	\$650,137	\$478,973
Tishomingo	\$15,682,845	210	3.3	\$1,223,552	\$279,010
Union	\$21,974,822	290	2.7	\$2,045,597	\$426,284
Yalobusha	\$3,576,080	50	1.6	\$289,414	\$595,568
Regional Totals	\$1,057,890,994	14,367	5.8	\$94,371,498	\$40,294,709

Does not include diesel fuel sales, nonresident licensing fees, or 83rd Division sales. Includes gasoline sales at the pump for some counties.

1. The travel and tourism employment percentage equals the estimated direct travel and tourism jobs/county establishment-based nonfarm employment. Data are based on where the employees work, not where they reside.
2. Estimated state/local travel and tourism taxes from travel/visitor expenditures and some other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX L

Pines Region Travel and Tourism Expenditures, Employment, Taxes, Tourism Capital Investment, FY 2017

THE PINES REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage (1)	State and Local Taxes Attributed to Travel and Tourism (2)	Tourism Capital Investment
Attala	\$17,267,583	235	5.1	\$1,326,076	\$978,634
Chickasaw	\$5,309,438	75	1.4	\$429,594	\$103,250
Choctaw	\$1,068,520	15	0.7	\$97,079	\$0
Clarke	\$4,065,456	57	2.0	\$330,931	\$532,331
Clay	\$19,709,958	265	5.0	\$1,671,939	\$399,828
Jasper	\$2,944,815	40	1.1	\$256,385	\$185,285
Kemper	\$1,461,956	22	0.8	\$148,958	\$21,432
Lauderdale	\$159,483,512	1,990	5.8	\$14,764,730	\$12,450,633
Leake	\$7,920,425	115	2.4	\$656,151	\$472,116
Lowndes	\$114,237,534	1,525	5.9	\$10,842,105	\$527,318
Monroe	\$16,979,463	235	2.4	\$1,262,536	\$1,254,598
Montgomery	\$11,556,775	155	6.2	\$1,007,995	\$93,058
Neshoba	\$36,028,487	1,975	16.2	\$3,059,943	\$338,379
Newton	\$6,436,984	90	1.6	\$506,396	\$29,454
Noxubee	\$5,008,195	70	2.6	\$425,535	\$0
Oktibbeha	\$100,073,163	1,360	6.1	\$8,838,992	\$15,899,310
Scott	\$20,599,298	280	2.1	\$1,568,580	\$361,944
Smith	\$1,957,983	28	1.0	\$162,688	\$163,692
Webster	\$2,356,433	34	1.8	\$205,581	\$33,344
Winston	\$16,835,037	235	5.1	\$1,307,167	\$311,266
Regional Totals	\$551,301,015	8,801	5.2	\$48,869,361	\$34,155,872

Does not include diesel fuel sales, nonresident licensing fees, or 83rd Division sales. Includes gasoline sales at the pump for some counties.

1. The travel and tourism employment percentage equals the estimated direct travel and tourism jobs/county establishment-based nonfarm employment. Data are based on where the employees work, not where they reside.
2. Estimated state/ local travel and tourism taxes from travel/visitor expenditures and some other activity. Includes 7 percent sales tax and 18.5 percent portion diverted to cities; state-licensed casinos; city/county taxes; state-licensed casino gaming tax revenues; room/restaurant special taxes; motor vehicle rental and petroleum tax diversions to counties; Alcohol Beverage Control county share of permit license fees; use taxes; tourism capital investment local permit fees; real and personal property taxes (hotels/casinos and restaurants in some counties). Data attributable to travel and tourism.

SOURCES:

Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Revenue; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX M

Estimated Hotel/Motel Room Count, CY 2016/CY 2017

County	Hotel/Motel Rooms (12-31-16)	Hotel/Motel Rooms (12-31-17)	Percentage Change
Adams	1,026	997	-2.8%
Alcorn	378	378	none
Amite	0	0	NA
Attala	130	130	none
Benton	0	0	NA
Bolivar	460	460	none
Calhoun	19	19	none
Carroll	0	0	NA
Chickasaw	52	52	none
Choctaw	0	0	NA
Claiborne	45	45	none
Clarke	25	25	none
Clay	208	208	none
Coahoma	932	932	none
Copiah	155	155	none
Covington	93	93	none
DeSoto	2,952	3,180	7.7%
Forrest	2,780	2,780	none
Franklin	0	0	NA
George	129	129	none
Greene	0	0	NA
Grenada	631	524	-17.0%
Gulf Coast (1)	14,513	14,743	1.6%
Hinds	5,573	5,776	3.6%
Holmes	40	40	none
Humphreys	30	30	none
Issaquena	0	0	NA
Itawamba	133	133	none
Jasper	27	27	none

County	Hotel/Motel Rooms (12-31-16)	Hotel/Motel Rooms (12-31-17)	Percentage Change
Jefferson	0	0	NA
Jefferson Davis	30	30	none
Jones	833	833	none
Kemper	32	32	none
Lafayette	1,050	1,170	11.4%
Lamar (2)			*
Lauderdale	2,058	2,058	none
Lawrence	30	30	none
Leake	57	57	none
Lee	1,848	1,940	5.0%
Leflore	825	825	none
Lincoln	487	487	none
Lowndes	1,288	1,217	-5.5%
Madison	2,305	2,340	1.5%
Marion	191	191	none
Marshall	190	190	none
Monroe	251	251	none
Montgomery	216	216	none
Neshoba	1,551	1,599	3.1%
Newton	87	87	none
Noxubee	64	64	none
Oktibbeha	873	873	none
Panola (3)	611	529	-13.4%
Pearl River	267	267	none
Perry (2)			*
Pike	607	608	0.2%
Pontotoc	56	56	none
Prentiss	100	100	none

APPENDIX M - CONTINUED

Estimated Hotel/Motel Room Count, CY 2016/CY 2017

County	Hotel/Motel Rooms (12-31-16)	Hotel/Motel Rooms (12-31-17)	Percentage Change
Quitman	0	0	NA
Rankin	2,652	2,652	none
Scott	221	221	none
Sharkey	19	19	none
Simpson	230	230	none
Smith	32	32	none
Stone	184	184	none
Sunflower	234	234	none
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	77	49	-36.4%
Tishomingo	76	45	-40.8%
Tunica	4,744	4,664	-1.7%
Union	344	344	none
Walthall	30	30	none
Warren	2,216	2,087	-5.8%
Washington	1,172	1,172	none
Wayne	129	129	none
Webster	33	33	none
Wilkinson	18	18	none
Winston	243	243	none
Yalobusha	20	20	none
Yazoo	225	225	none
Total	59,268	59,668	0.7%

Appendix M does not include bed & breakfast rooms, hotel/motel rooms under construction January - March 2018, cabins, or condo/timeshare/cottage rooms. County room counts are based on figures provided by various sources. Data may come from different sources on successive years. STR inventory data were used for 2016 - 2017 updates. Some counties had room inventory changes: closings, additions or renovations.

STR lodging inventory as of December 31, 2017: 694 hotels/motels and 59,498 rooms.

STR lodging inventory as of December 31, 2016: 690 hotels/motels and 59,206 rooms.

1. Gulf Coast is the combination of Hancock, Harrison and Jackson counties.
2. Lamar and Perry counties totals are included in Forrest County, as part of the Hattiesburg Area. Perry County does not have any hotels/motels.
3. Panola County had a hotel closed for renovations in 2017. This property will re-open in 2018. A separate new hotel was also built in Batesville in 2018.

SOURCES:

Mississippi chambers of commerce, economic development offices, cities, convention and visitor bureaus, tourism offices and other local entities; STR.

APPENDIX N

State Park Visitation, FY 2016/FY 2017

Park	FY 2016 Visits	FY 2017 Visits	Change
Buccaneer State Park	193,094	148,975	-22.8%
Clark Creek	15,123	12,870	-14.9%
Clarkco	43,604	46,490	6.6%
George P. Cossar	32,118	33,336	3.8%
Golden Memorial	1,406	1,382	-1.7%
Hugh White	38,183	35,284	-7.6%
J.P. Coleman	51,627	52,572	1.8%
John W. Kyle	52,384	50,071	-4.4%
Lake Lincoln	44,935	40,258	-10.4%
Lake Lowndes	33,175	37,155	12.0%
LeFleur's Bluff	33,043	38,201	15.6%
Legion	10,585	8,029	-24.1%
Leroy Percy	10,043	10,837	7.9%
Natchez	30,419	25,268	-16.9%
Paul B. Johnson	224,044	112,407	-49.8%
Percy Quin	106,740	131,915	23.6%
Roosevelt	94,309	90,336	-4.2%
Tishomingo	63,123	65,597	3.9%
Tombigbee	24,761	29,930	20.9%
Trace	59,760	45,180	-24.4%
Wall Doxey	28,445	27,050	-4.9%
Total	1,190,921	1,043,143	-12.4%

SOURCE:

Mississippi Department of Wildlife, Fisheries and Parks.

APPENDIX O

Mississippi Nonfarm Establishment-Based Employment Rankings, Direct Jobs, Top Sectors, FY 2017

Sector	FY 2017 Establishment Based Employment	FY 2017 Employment Percentage	Private Sector Rank
Manufacturing (1)	142,525	12.4%	1
Health care and social assistance -private (2)	129,800	11.3%	2
Retail Trade (3)	129,795	11.3%	3
Travel and tourism (4)	87,335	7.6%	4
Administrative support and waste management	63,990	5.6%	5
Leisure accommodation and food services (5)	62,045	5.4%	6
Construction (6)	40,850	3.6%	7
Transportation and warehousing (7)	45,785	4.0%	8
Other services (8)	40,240	3.5%	9
Wholesale trade	34,960	3.1%	10
Finance and insurance	32,315	2.8%	11
Professional, scientific and technical services (9)	30,115	2.6%	12
Information (10)	11,415	1.0%	13
Education services	12,085	1.1%	14
Management of companies	11,100	1.0%	15
Real estate and rental (11)	10,810	0.9%	16
Utilities	8,015	0.7%	17
Mining and logging	6,825	0.6%	18
Leisure arts, entertainment and recreation (12)	2,500	0.2%	19
Government (13)	242,885	21.2%	NA
Total statewide nonfarm direct employment	1,145,390	100.0%	NA

1. Durable goods comprised 94,317 jobs, or 66.2 percent of manufacturing jobs.
2. Does not include any public sector health care jobs. Those are included under government.
3. Does not include an estimated 10,139 travel and tourism jobs directly related to retail trade.
4. Includes accommodations, food services, amusement, arts, entertainment, state-licensed casino gaming and recreation, transportation, tourism construction, among other jobs. A portion of these jobs are not directly related to travel and tourism, based on the definition of a traveler/visitor in the Glossary. Those jobs not directly related to travel and tourism are included in the accommodations and food services; arts, entertainment and recreation sectors. Appendix A includes the direct FY 2017 statewide travel and tourism jobs.
5. Reflects portion of employment not directly related to travel and tourism, e.g., food services and drinking establishments.
6. Excludes travel and tourism-related construction jobs.
7. Excludes travel and tourism-related scheduled passenger and non-scheduled charter air transportation; interurban and rural bus transportation; taxi, limousine service, charter bus; scenic and sightseeing transportation; support activities for air transportation.
8. Excludes travel and tourism-related laundry services and parking lots and garages.
9. Excludes travel and tourism-related advertising and travel arrangement and reservation services.
10. Excludes motion picture and video production and motion picture theaters related to travel and tourism.
11. Excludes travel and tourism-related residential property managers and passenger car rental.
12. Includes non-travel and tourism employment, estimated portion attributed to locals.
13. Excludes an estimated 1,970 travel and tourism jobs funded by public monies - state tourism office staff, regional/international airports, museums, historical sights, performing arts, state parks, etc. Includes all public sector employment - including health care and education.

Government is a super sector.

SOURCE:

Mississippi Department of Employment Security, Labor Market Information Department, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

APPENDIX P

Room/Restaurant Gross Special Tax Revenues by Tourism Office, City-County, FY 2017

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2017 Room Tax Revenue	Gross FY 2017 Restaurant Tax Revenue	Gross FY 2017 Total Tax Revenue
Aberdeen	1.0	1.0	\$4,146	\$84,545	\$88,691
Baldwyn	None	2.0	None	\$136,384	\$136,384
Batesville	3.0	3.0	\$228,728	\$1,045,872	\$1,274,600
Bay Springs	3.0	None	\$3,248	None	\$3,248
Brandon (1)	3.0	2.0	None	\$1,073,589	\$1,073,589
Brookhaven	2.0	None	\$144,892	None	\$144,892
Byhalia	2.0	None	\$1,861	None	\$1,861
Canton	2.0	2.0	\$120,327	\$494,682	\$615,009
Carthage (2)	2.0	2.0	\$5,335	\$171,107	\$176,442
Cleveland	2.0	2.0	\$120,292	\$734,088	\$854,380
Clinton	2.0	None	\$173,574	None	\$173,574
Coahoma County	2.0	1.0	\$112,885	\$279,326	\$392,211
Columbus-Lowndes	2.0	2.0	\$298,492	\$1,922,744	\$2,221,236
Como	2.0	2.0	\$1,250	\$70,044	\$71,294
Corinth	2.0	2.0	\$114,416	\$1,232,589	\$1,347,005
DeSoto County	2.0	2.0	\$1,340,000	\$7,173,588	\$8,513,588
Florence	None	2.0	None	\$316,790	\$316,790
Flowood	None	2.0	None	\$2,688,376	\$2,688,376
Fulton	3.0	None	\$66,486	None	\$66,486
Greenwood	1.0	1.0	\$92,047	\$352,135	\$444,182
Grenada	2.0	1.0	\$151,800	\$369,645	\$521,445
Hancock County	2.0	None	\$130,358	None	\$130,358
Harrison County (3)	5.0	None	\$7,420,435	None	\$7,420,435
Hattiesburg	2.0	2.0	\$692,881	\$5,042,556	\$5,735,437
Hernando	3.0	None	\$34,890	None	\$34,890
Holly Springs	2.0	2.0	\$28,942	\$308,496	\$337,438
Horn Lake	\$2 per night	None	\$326,521	None	\$326,521

APPENDIX P - CONTINUED

Room/Restaurant Gross Special Tax Revenues by Tourism Office, City-County, FY 2017

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2017 Room Tax Revenue	Gross FY 2017 Restaurant Tax Revenue	Gross FY 2017 Total Tax Revenue
Houston (4)	2.0	2.0	\$6,667	\$147,079	\$153,746
Indianola	2.0	2.0	\$50,236	\$399,308	\$449,544
Jackson, City of (5)	4.0	2.0	\$2,571,705	\$6,070,271	\$8,641,976
Jackson County (6)	2.0	None	\$523,069	None	\$523,069
Kosciusko	2.0	None	\$33,836	None	\$33,836
Lauderdale County	2.5	None	\$808,005	None	\$808,005
Laurel	2.0	2.0	\$173,312	\$1,329,429	\$1,502,741
Louisville	2.0	None	\$40,913	None	\$40,913
Magee	1.0	1.0	\$28,771	\$232,221	\$260,992
McComb	3.0	None	\$242,214	None	\$242,214
Meridian (7)	None	2.0	None	\$1,580,335	\$1,580,335
Montgomery County	2.0	None	\$97,293	None	\$97,293
Moss Point	3.0	None	\$253,019	None	\$253,019
Natchez	3.0 plus \$2	1.5	\$903,156	\$789,167	\$1,692,323
New Albany	2.0	2.0	\$83,142	\$743,027	\$826,169
Newton	\$1/room night	None	\$12,024	None	\$12,024
Ocean Springs	2.0	2.0	\$43,517	\$1,305,854	\$1,349,371
Oxford	2.0	2.0	\$463,808	\$3,015,278	\$3,479,086
Pascagoula (8)	3.0	2.0	\$154,026	\$463,040	\$617,066
Pearl	None	2.0	None	\$681,626	\$681,626
Philadelphia	3.0	None	\$95,922	None	\$95,922
Picayune	2.0	1.0	\$55,317	\$406,957	\$462,274
Pontotoc	2.0	2.0	\$9,097	\$419,881	\$428,978
Rankin County	2.0	None	\$1,052,215	None	\$1,052,215
Richland	None	2.0	None	\$416,784	\$416,784
Ridgeland	1.0	1.0	\$359,820	\$1,305,119	\$1,664,939
Ripley	2.0	2.0	\$10,294	\$290,400	\$300,694

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2017 Room Tax Revenue	Gross FY 2017 Restaurant Tax Revenue	Gross FY 2017 Total Tax Revenue
Sardis	3.0	3.0	\$11,205	\$103,461	\$114,666
Senatobia	2.0	2.0	\$12,804	\$454,210	\$467,014
Southaven	1.0	1.0	\$325,617	\$1,538,373	\$1,863,990
Starkville	2.0	2.0	\$323,612	\$1,964,563	\$2,288,175
Stone County	2.0	2.0	\$34,194	\$401,663	\$435,857
Tishomingo County	2.0	None	\$21,901	None	\$21,901
Tunica County	3.0	3.0	\$716,616	\$939,436	\$1,656,052
Tupelo	2.0	2.0	\$592,357	\$3,702,314	\$4,294,671
Vicksburg	3.0	1.0	\$798,816	\$912,446	\$1,711,262
Washington County	3.0	1.0	\$322,085	\$609,695	\$931,780
West Point	2.0	2.0	\$52,545	\$489,639	\$542,184
Winona (9)	None	2.0	None	\$136,452	\$136,452
Yazoo County	2.0	2.0	\$69,287	\$457,777	\$527,064
Total			\$22,966,223	\$54,802,361	\$77,768,584

NOTE: Tourism offices include CVBs, convention and visitor councils, tourism associations, tourism commissions, and councils, cities/counties and chambers. A portion of these gross revenues are attributed to locals. September 2016 - August 2017 Collections (July 2016 - June 2017 sales).

1. The 3 percent Brandon lodging tax went into effect August 1, 2017, or FY 2018.
2. Carthage's 2 percent lodging and 2 percent restaurant tax became effective December 1, 2016.
3. The 5 percent lodging tax is broken down by 55 percent to the Board of Supervisors and 45 percent to the Mississippi Gulf Coast Regional CVB.
4. Houston's 2 percent lodging and restaurant tax became effective September 1, 2016.
5. Includes a 75 cents per night charge per occupied room.
6. This Jackson County lodging tax goes to the Mississippi Gulf Coast Regional CVB.
7. Meridian's 2 percent restaurant tax became effective September 1, 2016.
8. Pascagoula's 2 percent restaurant tax became effective January 1, 2017.
9. Winona's 2 percent restaurant tax became effective October 1, 2016.

Some figures may reflect adjustments-overpayments.

SOURCE:

Mississippi Department of Revenue.

TABLE 1

Origin of Highway Welcome Center Registrants by U.S. and International Travelers, FY 2016 and FY 2017

Origin	FY 2016 Registrants	FY 2017 Registrants	Percentage Change
States	1,890,855	1,855,037	-1.9%
Countries	66,364	57,864	-12.8%
Total	1,957,219	1,912,901	-2.3%

NOTE: Tables 1-3 only reflect those visitors who completed the registration forms

SOURCE: Visit Mississippi.

TABLE 2

Highway Welcome Center Registrants, Top 10 States, FY 2016 and FY 2017

State	FY 2016	FY 2017	Percentage Change	State's Share of FY 2017
Mississippi	339,116	340,623	0.2%	18.4%
Louisiana	295,198	283,843	-3.8%	15.3%
Alabama	183,671	184,177	0.3%	9.9%
Texas	177,628	177,792	0.1%	9.6%
Florida	132,933	128,621	-3.2%	6.9%
Georgia	109,298	108,913	-0.4%	5.9%
Tennessee	108,724	106,733	-1.8%	5.8%
Arkansas	78,961	76,123	-3.6%	4.1%
Missouri	65,495	61,899	-5.5%	3.3%
Illinois	47,280	42,175	-10.8%	2.3%
Other	352,551	344,138	-2.4%	18.6%
Total	1,890,855	1,855,037	-1.9%	100.0%

SOURCE: Visit Mississippi.

TABLE 3

Highway Welcome Center Registrants, Top 10 Countries, FY 2017

Country	Registrants	Percentage of Countries	Percentage of Top Ten
Canada	16,650	28.8%	34.9%
England	8,832	15.3%	18.5%
Germany	6,346	11.0%	13.3%
Australia	4,417	7.6%	9.2%
France	3,569	6.2%	7.5%
Mexico	3,542	6.1%	7.4%
Holland	1,847	3.2%	3.9%
Switzerland	1,045	1.8%	2.2%
New Zealand	771	1.3%	1.6%
Belgium	741	1.3%	1.6%
Other	10,104	17.5%	NA
Total	57,864	100.0%	100.0%

SOURCE: Visit Mississippi.

TABLE 4

Selected Casino Hotel Lodging Indicators by Region, FY 2016

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	11	6,417	89.0	\$73.95
Northern	9	4,226	64.8	53.77
Central	6	700	63.6	74.68
Quarterly Average	26	11,343	78.5	\$67.85

Selected Casino Hotel Lodging Indicators by Region, FY 2017

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	12	6,627	88.3	\$73.28
Northern	8	4,079	62.1	55.68
Central	6	726	64.6	74.24
Quarterly Average	26	11,432	77.5	\$68.30

NOTES: Coastal revenues are for cities in Hancock and Harrison counties. Northern revenue reflects Coahoma and Tunica counties. Central revenues comprise cities in Adams, Warren and Washington counties. Data reflect fiscal year quarterly averages. A large portion of casino hotel rooms are complimentary.

SOURCE: Mississippi Gaming Commission quarterly surveys.

GLOSSARY

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

Federal and local government fiscal year: October 1 to September 30.

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

Government expenditures: Public expenditures from state agency, city and county budgets allocated for travel and tourism-related projects, or projects with some travel and tourism linkages.

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 during several years by independent financial institutions.

IMPLAN: A nationally recognized economic contribution model to estimate the economic activity associated with a sale of a good or service. It is the basis for estimating indirect and induced contributions. In the IMPLAN

model, indirect and induced impacts are filtered through a Social Accounting Matrix (SAM) for total value added, employment and labor income.

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

Induced contribution: Secondary contribution from the purchases made by the workers (consumer level), holding everything else constant. Example: Hotel employee wages contribute to the purchase of goods and services in the local economy.

In-state traveler spending: Mississippians traveling within the state, at least 50 miles one way.

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

Multipliers: The direct contribution plus the indirect contribution plus the induced contribution divided by the direct contribution.

Net traveler/visitor sales and tax revenues: Estimated portion of travel and tourism-related sales and tax revenues after removing the estimated local components of the estimated gross sales and General Fund revenues.

North American Industry Classification System (NAICS) codes: Six-digit coding system using a production-oriented approach to categorize economic units, focusing on how products and services are created.

Secondary jobs and income: Those jobs outside the travel and tourism business or entity. Example: Truck driver who delivers linens to a hotel, or food and beverage products to restaurants. The income component pertains to wages earned by those with secondary jobs.

Sector: The broad two-digit NAICS category, e.g., sector; 44 - 45 retail trade (sector under trade, transportation and utilities); 72 accommodation and food services (sector under leisure and hospitality supersector).

State fiscal year: July 1 to June 30.

State gross domestic product: A measurement of a state's output – the sum of value added from all industries in the state. State GDP measures the value added to U.S. production by the labor and capital in each state.

State-level travel and tourism accounts: A system encompassing travel and tourism's broader view. It focuses on the circular flow of goods and services in the economy between travel and tourism industry supply and the impact of travel and tourism commodity demand within a state.

Total value added: Payments to labor and capital by industry, or gross output less intermediate inputs. The total contribution (direct, indirect, induced) of an industry or sector to GDP.

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

Travel and tourism: The science, art and business of attracting and transporting travelers/visitors, accommodating them and graciously catering to their needs and wants. Travel and tourism is a "composite industry" comprising different sectors of the economy.

Travel and tourism economy: Group, match and use NAICS and IMPLAN codes to estimate travel and tourism's state/county contribution of value added, employment and labor income associated with travel and tourism, tourism

capital investment, travel and tourism's contribution to the General Fund, travel expenditures, government spending, travel and tourism exports and imports. Overlapping elements exist between travel and tourism economy and industry.

Travel and tourism exports: Travel expenditures by out-of-state travelers/visitors in Mississippi.

Travel and tourism imports: Travel expenditures by Mississippi residents outside the state.

Travel and tourism industry: Assembling and use of NAICS codes to estimate travel and tourism's statewide contribution for direct employment, annual payroll for direct jobs, travel expenditures, value added, state and city/county tax revenues, General Fund revenues, etc.

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

Value added: Economic measure of production which includes only goods and services produced in

Mississippi. It estimates the state's direct travel and tourism contribution to GDP. Total value added: total contribution (direct, indirect and induced) of an industry sector to GDP.

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 - Bolivar County. Nancy J. Havens, Tax Assessor and Collector; Tiffany White.
 - Clay County. Paige Lamkin, Tax Assessor and Collector.
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