



2016
ECONOMIC
Impact
REPORT
VISIT
MISSISSIPPI

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Welcome to the Fiscal Year 2016 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, an estimated 23 million visitors spent \$6.3 billion in Mississippi and generated \$395.1 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.

Governor Phil Bryant



Tourism is a vital component of our state's economy. More than 86,000 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.

Glenn McCullough, Jr. | The Mississippi Development Authority Executive Director



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 — \$130.4 million, or 2.1 percent, over FY 2015 — and this growth our state succeed in many other areas. Considering our unmatched contributions to music, literature and the arts, culture may be Mississippi's most valuable currency.

Craig Ray | Director of Visit Mississippi

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01 EXECUTIVE SUMMARY

This report estimates travel and tourism's Fiscal Year 2016 economic contribution at the state and county level for Mississippi. Travel and tourism is vital to Mississippi's economy, based on 86,600 direct jobs in FY 2016 – a 1.7-percent increase from the prior fiscal year. Nearly 98 percent were in the private sector. Travel and tourism comprised 7.6 percent of FY 2016 total direct statewide establishment-based nonfarm employment.

Food services and drinking establishments, state-licensed gaming and lodging jobs were the top three in direct FY 2016 travel and tourism employment in Mississippi, based on Appendix A. The 22,543 state-licensed

casino gaming jobs, including casino hotels, equaled 26 percent of direct travel and tourism employment, with all other direct travel and tourism jobs accounting for the remaining 74 percent. Food services and drinking places reflected a net gain of 1,227 full-time equivalent jobs, or 83.8 percent of the total net gain of 1,465 full-time equivalent jobs, versus FY 2015.

All casino hotel rooms accounted for 12,479, or 21.1 percent, of 59,268 statewide hotel/motel rooms. In FY 2016, a Mississippi casino hotel had 446 rooms, on average; non-casino hotel/motels had an average size of 70 rooms.

Mississippi's executive and legislative branches recognize

TRAVEL AND
TOURISM IS A
DRIVING FORCE

in the state's economic
development efforts.

Travel and tourism rank fourth in private statewide nonfarm employment behind manufacturing, retail trade, and private health care/social assistance.

FY 2016 Expenditures

Travel and tourism's \$395.1 million slice of the FY 2016 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 124,180, or 10.9 percent, of jobs in the state. These jobs generated \$2.99 billion in total FY 2016 labor income.

Travel and tourism clearly 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 stayed constant, Mississippi's economy without travel and tourism, would yield:

- **\$395.1 MILLION LESS**
IN GENERAL FUND REVENUES.
- **124,180 FEWER TOTAL JOBS**
(DIRECT, INDIRECT AND INDUCED).
- **\$2.99 BILLION LESS**
IN TOTAL ANNUAL PAYROLL ASSOCIATED
WITH THIS INDUSTRY AND OTHER
QUALITY-OF-LIFE ISSUES.

Also, subtracting the 86,600 direct statewide travel and tourism jobs out of Mississippi's economy would more than double the state's annual unemployment rate from 5.9 percent to 12.3 percent. Most of the 86,600 direct and 37,580 secondary travel and tourism jobs cannot be outsourced.

03 MISSISSIPPI AS AN ATTRACTION

Travel and Tourism Exports and Imports

Travel and tourism is one of Mississippi's largest export industries, generating economic benefits across all parts of the state which directly affect the entire 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

\$4.8 BILLION

I N M I S S I S S I P P I

Out-of-state visitors spent an estimated \$4.8 billion in Mississippi, 76.2 percent of \$6.3 billion in statewide FY 2016 visitor spending. Mississippians traveling within the state – 50 miles or more, one-way – spent an estimated

\$1.5 billion on in-state trips, or 23.8 percent of \$6.3 billion. Mississippians' out-of-state business and leisure travel expenditures were an estimated \$4.1 billion.

Estimated Effective Tax Rates

Estimates by the University Research Center and Visit Mississippi show \$103.7 million in travel and tourism-related personal income and sales taxes went to the FY 2016 General Fund, an increase of 2.3 percent versus FY 2015.

A Consistent Producer

Travel and tourism industry is a “consistent producer” in Mississippi, helping state and local governments to close budget gaps and pay for much-needed services. 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 the cities; motor vehicle rental taxes; 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 ranked fourth in total estimated private FY 2016 direct nonfarm, establishment-based employment, behind manufacturing, retail trade, private health care and social assistance. Most of the direct FY 2016 statewide travel and tourism jobs – 84,625 of 86,600, or 97.7 percent – were private sector careers, including hotels/motels, restaurants, casinos and retail. The other 1,975, 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 2016 accounted for 7.6 percent of all establishment-based nonfarm jobs, and 85,135 statewide direct travel and tourism jobs in FY 2015 were 7.6 percent of all jobs.

MISSISSIPPI'S **86,600**

direct travel and tourism jobs in
FY 2016, were the most in 11 years

Mississippi's 86,600 direct travel and tourism jobs in FY 2016, were the most in 11 years and 1,300 more than the FY 2007, pre-“Great Recession,” number of 85,300. The 86,600 direct travel and tourism jobs in FY 2016 comprised 101.5 percent of the 85,300 pre-recession figure in FY 2007. These 86,600 direct jobs reflected a 1.7 percent increase versus 85,135 in FY 2015.

Statewide travel and tourism direct jobs averaged 85,880 per year during the 20-year period FY 1997 through FY 2016. Thus, 86,600 direct statewide travel and tourism jobs in FY 2016 were 720 more, or an increase of 0.8 percent, versus the 20-year average figure of 85,880. 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 direct jobs in FY 2000.



Dunleith - Natchez, Mississippi

05

CITY/COUNTY/STATE LEVEL INDICATORS

LOCAL TRAVEL AND TOURISM INDICATORS INCLUDE ECONOMIC CONTRIBUTION 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 700 total hotel/motel properties as of Dec. 31, 2016, per a countywide lodging census conducted by Visit Mississippi, plus census data from STR, a source for global data benchmarking, analytics and marketplace insights. Statewide hotel/motel rooms increased from 58,305 as of Dec. 31, 2015, to 59,268 as of Dec. 31, 2016, or 1.7 percent. An estimated 1,000 new statewide hotel and motel rooms were under construction, or could be finalized by Dec. 31, 2017, an increase of 1.7 percent. Mississippi's inventory also had 143 estimated bed-and-breakfasts as of Sept. 30, 2016, with 792 total bed-and-breakfast rooms, 1,320 cabins, 13,819 recreational vehicle spaces with electricity and water and 1,878 camp sites without hook-up.

In Calendar Year 2016, Mississippi lodging facilities achieved a statewide average daily rate of \$84.68, based on STR

research, an increase of 3.1 percent versus \$82.12 in CY 2015. Mississippi's CY 2016 statewide occupancy percent was 57.1 using STR data for non-casino properties. State-licensed casino hotels had a 78.5 occupancy percent, but many rooms at casino hotels were used free-of-charge by preferred customers or prize winners. Their average daily rate was \$67.85. State-licensed casino hotel rooms totaled 11,408 as of Dec. 31, 2016, excluding the 1,071 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 \$59 million, or 33.1 percent, of the \$178 million in city/county taxes/fees attributed to travel and tourism in FY 2016 came from the state-licensed casino city/county tax revenue portion of gross gaming revenues. Another \$119 million, or 66.9



Monmouth - Natchez, Mississippi

percent, were from room/restaurant special tax revenues, hotel/motel real and personal property taxes including casinos and casino hotels/other hotels, restaurants, seawall taxes for coastal counties, Mississippi Department of 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 \$51.08 million, or 69.6 percent, of FY 2016 special tax revenues were generated by restaurant sales, with \$22.35 million, or 30.4 percent, from lodging. FY 2016 special tax revenues totaled \$73.43 million.

“ Estimated travel and tourism expenditures by visitors totaled **\$6.3 BILLION IN FY 2016,** ”
COMPARED TO \$6.17 BILLION IN FY 2015.

Travel and Tourism Advertising and Employment by Partners

Thirty tourism partners – CVB's, tourism commissions, partnerships – received FY 2016 advertising and employment/payroll mini-surveys from October 2015 to September 2016. Fourteen, or 46.7 percent, responded. Additional respondents were drawn from FY 2015 data. FY 2016 travel and tourism partners' employment/payroll data reflected 155 full-time-equivalent staff with \$7.7 million in salaries, wages and fringe benefits. (The employment component is included in Appendix A and the payroll item in Appendix B, under a broader category.) The travel and tourism partners responding to the survey reflected a total estimated budget of \$26.3

million for FY 2016. The FY 2016 advertising summary indicates approximately \$10 million was spent by respondents to the survey, with \$3.46 million, or 34.6 percent, on traditional ad placement and production; \$1.6 million, or 16 percent, on digital media placement totaling \$1,476,960, plus digital media services totaling \$145,246. Another \$490,584 was spent on ad agency retainer fees, \$286,398 for promotional items, \$313,464 for trade show participation, \$98,195 for Familiarization Tours, \$337,998 for billboard advertising, \$546,378 for brochure, collateral and other printing, \$2,250,004 in sponsorships and local events, \$364,704 for web site maintenance and \$278,764 was spent through matching grant programs.

Mississippi Visitor Profile Study

Approximately 23 million estimated total visitors in FY 2016 – including domestic leisure, business, other personal, plus all group travel, and international visitors – overnighed in, or participated in a day trip to Mississippi, or an increase of 3 percent versus 22.33 million in FY 2015. Mississippi, on average, had 22 million visitors per year during a 20-year period from 1997 to 2016. This ranged 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 TNS Mississippi Travels America FY 2016 Visitor Profile study; Mississippi Gaming Commission quarterly surveys – patrons by state of origin and occupancy rates for state-licensed casino

hotels; STR surveys; Mississippi Welcome Center registration data; state park visitation; among other sources.

Regional/county level visitation is challenging to estimate. Sources in the prior paragraph assisted in estimating 6.2 million visitors for the Mississippi Gulf Coast in FY 2016. The Hattiesburg Area (Forrest, Lamar and Perry counties) may have 1.8 million visitors. Meridian-Lauderdale County could have 1.1 million visitors. Visit Jackson has reported prior annual visitation of about 3 million.

TNS, a domestic visitation source, cited 80 percent as leisure travelers-tourists; 11 percent business and 9 percent personal business/other. Sixty-seven percent of all visitors were

from out-of-state, and 67 percent of Mississippi trips were overnight ones. Thirty-three percent were day trips. Leisure trips to Mississippi: 69 percent overnight stays and 31 percent day trips. Business trips to Mississippi: 70 percent overnight stays and 30 percent day trips. Average annual household income for all Mississippi visitors: \$64,900 (median \$51,600); average age: 50 (median 53). Average travel party size: 2.5 persons (2.6 persons for leisure and 2.2 persons for business), with 2.7 nights spent in Mississippi. In-state residents spent two nights, on average, in their home state while non-residents spent three nights, on average, visiting Mississippi. About 46 percent traveled in pairs, and 23 percent traveled with children. Five percent of all Mississippi visitors arrived by air. Vacation activity niche characteristics varied with casino gamers as the largest market. Data was based on survey respondents who had traveled more than 50 miles from home, or overnight for business or pleasure, excluding commuters. All respondents were required to have traveled for leisure in the past 12 months.

Canadian Overnight Travel to Mississippi

Per Statistics Canada, 38,900 Canadians overnighed in Mississippi during 2015. Approximately 23,800 of these travelers, or 61.1 percent, were from Ontario. Average

23 MILLION

ESTIMATED TOTAL VISITORS

80%

LEISURE
TRAVEL-TOURISTS

11%

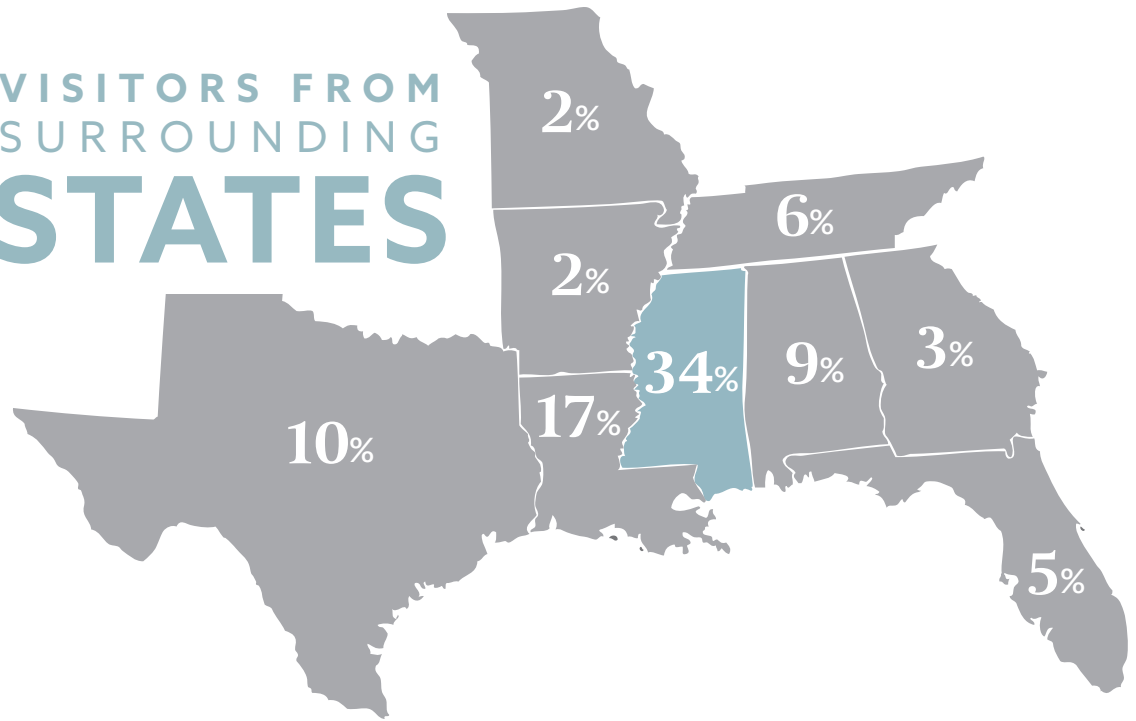
BUSINESS

9%

PERSONAL BUSINESS
AND OTHER

travel party size: two persons; average length of stay: 2.1 nights. An estimated \$7 million in U.S. dollars were spent by 19,450 travel parties, \$360 per travel party. Most (78.9 percent) of these travel parties were on vacation; one in six (17 percent) visited friends and relatives; one in 25 (4.1 percent) cited other personal/business reasons. About 60 percent of these Canadian overnight travelers were between ages 55 and 74. Three-fourths (74 percent) of the travelers overnighted in hotels and/or motels; another 10 percent did so in cabins, cottages or other

VISITORS FROM SURROUNDING STATES



THE TOP MISSISSIPPI DESTINATIONS

- Gulf Coast
- Jackson Area
- Tupelo
- Hattiesburg Area
- Tunica and DeSoto Counties
- Meridian
- Vicksburg
- Oxford
- Natchez
- Starkville and Philadelphia

accommodations. The remainder overnighted with friends or relatives. Mississippi receives more international travelers from Canada than from any other country in the world.

International Travel to Mississippi

Per Tourism Economics, an Oxford Economics Company, Mississippi received 147,600 international overnight visitors in CY 2015, a 4.8-percent decrease versus 155,100 international visitors in CY 2014. The CY 2010-to-2013 figures were: 126,700 (2010), 148,300 in both 2011 and

2012 and 143,500 in 2013. Canada accounted for 38,900, or 26.4 percent of international visits in CY 2015 followed by the United Kingdom's 14,700 visits, comprising 10 percent of all visits. Countries ranked third through tenth in terms of CY 2015 international visits were China (8,800), Germany (6,700), Mexico (6,100), France (5,800), Brazil (4,400), India (3,300), Japan (3,100) and the Republic of Korea (3,000). China's international visits increased from 3,500 in 2010 to 8,800 in 2015, or 151.4 percent.

09 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 2,441,086 people serviced at Welcome Centers in FY 2016, 1,957,219 – or 80.2 percent – registered. FY 2016 international travelers comprised 66,364, or 3.4 percent of registrants, the identical proportion in FY 2015 based on 68,857 international registrants.

U.S. registrants decreased from 1,952,256 in FY 2015 to 1,890,855 in FY 2016, or by 3.1 percent. The international segment decreased by 3.6 percent; and total registrants decreased 3.2 percent. Mississippi, Louisiana, Alabama, Texas, Florida and Georgia held the top six spots for U.S. travelers in FY 2016. Canada had the most international registrants, accounting for 27.2 percent of visitors in FY 2016.

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 22nd year of operation in June 2016 with \$72,095 in revenue, 693 reservations and 828 room nights booked.

Regional Airport/Air Passenger Data

Mississippi's regional/international airports reported 879,310 scheduled revenue passengers from January 2016 through December 2016, a 0.8-percent decrease versus 885,018 in CY 2015 revenue passengers.

The Jackson-Medgar Wiley Evers International Airport enplaned 491,223 revenue passengers, or 55.9 percent, of all CY 2016 passengers enplaned 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 311,597 paid scheduled service enplanements in CY 2016. Their three carriers are American Airlines, Delta and United. Cities served include Atlanta, Charlotte, Dallas-Ft. Worth and Houston. Other CY 2016 enplanements: Golden Triangle (40,624), Meridian (16,574), Hattiesburg/Laurel (8,443), Tupelo (5,966) and Greenville Mid-Delta (4,883). Tunica County's airport had 2,823 charter passenger enplanements in FY 2016 (October 2015-September 2016), with 51 U.S. cities, including Atlanta, Austin, Detroit, Jacksonville, Kansas City, Missouri and Tulsa. An estimated \$1.13 million in FY 2016 net capital expenditures and improvements were made to the airport.

A close-up photograph of an Amtrak train car. The car is silver with a red stripe at the bottom. The Amtrak logo, consisting of the word "AMTRAK" in a bold, sans-serif font above a stylized arrowhead graphic, is prominently displayed on the side. Below the logo, the word "Dining" is partially visible. The train is moving, as indicated by the blurred background and the reflection on the car's surface.

AMTRAK

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. Amtrak's City of New Orleans began making flag stops in Marks, Miss., in late 2016.

Ten Mississippi stations with Amtrak include Brookhaven, Greenwood, Hattiesburg, Hazlehurst, Jackson, Laurel, McComb, Meridian, Picayune and Yazoo City. Total FY 2016 ridership in Mississippi was 103,562, down 3.3 percent from 107,109 in FY 2015. FY 2016 total U.S. Amtrak ridership was 31.3 million, or 0.5 percent above the 30.8 million in FY 2015. Ridership is the sum of total of passengers boarding and disembarking. U.S. Amtrak passenger FY 2016 revenue was \$2.14 billion.



11 GAMING

Mississippi had **28** state-licensed casinos on Feb. 1, 2017, including **12** on the Mississippi Gulf Coast; nine in the Northern Region (Tunica and Coahoma County); **7** in the Central Region (Greenville, Washington County, Natchez and Vicksburg).

Total FY 2016 state-licensed casino gross gaming revenues were \$2.1 billion, with \$1.45 billion, or 68.8 percent, as the estimated net traveler/visitor share. This \$1.45 billion was 23 percent of the \$6.3 billion in statewide travel and tourism expenditures by travelers.

MISSISSIPPI'S GAMING TAX REVENUES WERE

\$255.4 MILLION

in FY 2016: \$169.8 million in state receipts; \$85.6 million for cities/counties. Travel and tourism comprised \$116 million of \$169.8 million of state receipts and \$59 million of \$85.6 million of city/county receipts. The \$255.4 million in total state and local gaming tax revenues featured \$175 million, or 68.5 percent, from tourism. Of \$169.8 million in state tax receipts, \$133.8 million, or 78.8 percent, went into the General Fund; \$36 million, 21.2 percent, was appropriated to the Mississippi Department of Transportation. Travel and tourism's portion of \$133.8 million in General Fund gaming dollars was \$92 million, or 68.7 percent. The \$92 million was 23.3 percent of travel and tourism's \$395.1 million contribution to the General Fund.

Mississippi Gaming Commission Quarterly Survey Trends

Some 61.7 percent of all FY 2016 statewide patrons reside out-of-state, primarily Alabama, Arkansas, Florida, Georgia, Illinois, Louisiana, Oklahoma, Tennessee and Texas, per Mississippi Gaming Commission data. Coahoma and Tunica County casinos in the Northern Region had 74.5 percent of out-of-state patrons, due to Arkansas, Tennessee, Illinois, Missouri, Oklahoma and Alabama visitors. About 27.7 percent of the Central Region – Greenville, Natchez and Vicksburg – casino patrons came from out-of-state, e.g., Arkansas and Louisiana. Of the Coastal Region casino patrons, 64.6 percent lived out-of-state, e.g., Louisiana, Florida, Alabama, Georgia and Texas.

State-licensed casinos, plus their hotels, contributed an FY 2016 payroll of \$679.5 million, up 3.2 percent from FY 2015. FY 2016 advertising and promotional expenditures attributed to state-licensed casinos were \$102 million, a 2.2-percent decrease versus FY 2015. State-licensed casino hotel rooms increased from 11,036 in FY 2015 to 11,343 in FY 2016, or 2.8 percent.

Hotel and convention facilities hosted 1,354 conferences in FY 2016 with 185,070 total delegates. Total FY 2016 ticketed show/concert attendees was 220,323.

Gaming Employment

The 22,543 state-licensed casino employees and casino hotel employees were 26 percent of 86,600 direct travel and tourism jobs, according to FY 2016 quarterly casino employment data from Mississippi Department of Employment Security, Labor Market Information Department surveys.

Non-gaming Summary of Revenue for State-Licensed Casinos

Room revenue at state-licensed casino hotels was \$242.7 million in FY 2016, or an increase of 6.6 percent versus FY 2015, while food and beverage revenue totaled \$301.2 million, \$95.5 million less, a drop of 24.1 percent, versus FY 2015. FY 2016 other non-gaming revenue was \$105 million, or \$1.5 million below the \$106.5 million in FY 2015, a 1.4-percent decrease. These non-gaming dollar amounts are significant, even though many lodging, food, beverage and other amenities/services are complimentary.

13 OUTDOOR RECREATION

The Department of Wildlife, Fisheries and Parks, U.S. Army Corps of Engineers, Vicksburg's National Military Park, Natchez's 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. Vicksburg's National Military Park had 510,234 visitors in FY 2016. Natchez's National Historical Park had 204,332 recreation visits in CY 2015. 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 an estimated 20,000 visitors in FY 2016. Hunting, fishing and other wildlife-related activities entice visitors to many parts of Mississippi. Travel parties spend significant dollar amounts on

food, lodging, transportation and other items: fuel, fishing and hunting equipment, auxiliary and special equipment.

Camping and RV travel play significant roles in Mississippi's travel and tourism economy. Mississippi houses 13,819 RV spaces with electricity and water, and 1,878 camp sites without hook-up, per a 2016 survey. The Pearl River Valley Water Supply District (parts of Hinds, Leake, Madison, Rankin and Scott counties) reported 2.5 million visitors in FY 2016. Mississippi's State Parks have 1,616 camp sites. State park visitation figures show an 11.2-percent increase in FY 2016 visitation versus FY 2015. The Department of Wildlife, Fisheries and Parks reported \$9.24 million in FY 2016 non-resident licensing sales versus \$9.3 million in FY 2015.



“ HUNTING, FISHING AND OTHER WILDLIFE-RELATED ACTIVITIES
entice visitors
TO MANY PARTS OF MISSISSIPPI.”



16 STATE TRAVEL & TOURISM LINKS

Tourism Capital Investment FY 2016 Surveys (October 2015 – September 2016)

FY 2016 tourism capital investment data were updated, with input from city and county building/permit departments, Dodge Data Analytics and state agencies. 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 since it focuses on travel and tourism construction. For example, the Mississippi Department of Transportation spent \$6,241,035 to maintain Welcome Centers and rest areas.

\$133 MILLION

of FY 2016 tourism capital investment,
WAS FROM PRIVATE SOURCES.

Total estimated FY 2015 statewide tourism capital investment was \$298.5 million, based on data secured, and \$255 million in FY 2016, or \$43.5 million less – a 14.6-percent decrease.

The other \$122 million, or 48 percent, came from federal, state and local government sources.

The Mississippi Gulf Coast accounted for \$81 million in FY 2016 tourism capital investment, or 31.8 percent of the state's total. Retail establishments, infrastructure (airport-highway), completion of a casino and hotel project (October to December 2015), casino renovations, restaurants and others comprised this calculation.

Jackson's metropolitan statistical area – including Copiah, Hinds, Madison, Rankin, Simpson and Yazoo counties – combined FY 2016 tourism capital investment was \$60.8 million, or 23.8 percent of the statewide total. Projects included two new museums and new hotel in Jackson; Madison-Rankin infrastructure projects, restaurants and retail; and a new hotel in Pearl.

DeSoto County had new retail projects and a new youth baseball stadium built. Most of the infrastructure focused on State Road 304-Interstate 69, of the \$4.4 million in tourism capital investment. The Hattiesburg area

(Forrest/Lamar/Perry counties) had \$23.8 million in FY 2016 tourism capital investment. This included new hotels and restaurants.

Tupelo's \$4.3 million for FY 2016 tourism capital investment covered retail renovations, along with renovations at the Elvis Presley Birthplace Event Center.

Oxford-Lafayette County tourism capital investment was \$21.9 million, with a new parking garage, a new hotel and road construction.

Starkville-Oktibbeha County tourism capital investment reached \$21.2 million, most of which was for Mississippi State University's Dudy Noble Field at Polk-DeMent Stadium. Marshall County featured infrastructure-related work, as part of \$2.7 million in tourism capital investment.

Meridian/Lauderdale County's FY 2016 tourism capital investment of \$5 million covered highway/airport infrastructure, athletic fields and retail.

Natchez had \$2.6 million in FY 2016 tourism capital investment, with infrastructure, train depot renovation, bed and breakfast and restaurant renovations. Vicksburg's \$1.4 million in FY 2016 tourism capital investment was in athletic fields, infrastructure and retail.

THE 15 FEATURES PRODUCED IN MISSISSIPPI IN FY 2016 INCLUDED

Porches & Private Eyes

Southern Fury

Missing Daughter

Deadly Affair

The Base

Kudzu Zombies

Kill 'Em All

Thrasher Road

It's Time

Malicious

Atone

Although I Deserve to Die

Fighting Belle

Purgatory Road

Demons

Film Productions, Documentaries, and Commercials

Calendar Year 2016 was the busiest year of production activity in Mississippi's history. Attracted by a growing workforce, a strong reputation of support and service, and a solid motion picture incentive program, 15 features were filmed in Mississippi along with several feature documentaries, television series, commercials and four reality series on television: "Bring It!," "Last Chance U," "Street Outlaws" and the upcoming "Home Town."

Film Office surpassed performance measures on several fronts in 2016. Aiming for 11 feature television productions, Mississippi produced 15 features. The total number of television production days – 272 – exceeded the goal of 226 production days. In-state production budgets for the year totaled \$26,626,254 – more than \$1.1 million more than the target. Mississippi resident film-related payroll totaled \$6,594,219 – \$1.8 million more than anticipated.

The cast and crew of the upcoming Marvel film "Logan," though filming in Louisiana, spent three weeks in Natchez, spending an estimated \$600,000. All projects totaled to 577 days of production activity across the state, from Charleston to Brookhaven, Biloxi

5 DOCUMENTARIES PRODUCED IN MISSISSIPPI

"Steve Azar & The King's Men,"
"Gulf South Outdoors," "Hook It &
Cook It," "The God Who Speaks"
and "4 Outdoors"

to Kosciusko, and Clarksdale to Laurel. There were 1,200 plus pre-and-post production days. Some 164 existing Mississippi businesses, along with 40 different hotels found a new income stream: the film industry.

Production was scattered throughout the state. With every corner of the state hosting production activity, local filmmakers launched filmmaking efforts in their respective communities all over the state. Travis Mills returned to Brookhaven to film "Porches & Private Eyes" and established a film festival. Filmmakers came to Mississippi to tell the inspiring story of Ole Miss football player Chucky Mullins. Steve Azar channeled B.B. King's musical genius. The athletics program at East Mississippi Community College, The Dollhouse Dance Factory and The Dancing Dolls in Jackson, and Erin and

Ben Napier of Laurel all became national celebrities.

Infrastructure development, work force education and training, and financial investment showed growth in 2016. Education was enhanced on multiple fronts: a reinvigoration of the film program at the University of Southern Mississippi and a partnership with Mississippi Gulf Coast Community College, a new focus on film at Ole Miss, a post-production-useful curriculum at Mississippi State, the expansion of film industry-based curriculum at Hinds Community College and Pearl River Community College and new film programs at Belhaven University and Mississippi College. Film festivals throughout the state offered public seminars and workshops. Private commitment continued with the



enhancement of production capabilities at The Mississippi Film Studios in Canton and Waveland Studios. Six new support service companies on the Coast and in Jackson were established, creating permanently staffed in-state production bases. Financial commitment was increased through Charter Bank, BankPlus, The First, Butler Snow and various private individuals.

The Mississippi Film Office supported the professional production alliances located in Jackson and on the Coast, and sponsored statewide film festivals and related events through incentive grants and programming support. The film office also directly supported indigenous filmmaking by continuing to fund the Mississippi Emerging Filmmakers Grant program administered by the Mississippi Film and Video Alliance and supporting the efforts of Barefoot Documentary Workshops.

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, 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, 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 \$109.6 billion in CY 2016, 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.



MISSISSIPPI *Authentic*



The Guest Room - Starkville, Mississippi

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 industry GDP.

Mississippi had a 5.9 percent unemployment rate based on a 12-month moving average, January-December 2016, versus 6.3 percent for January-December 2015. The civilian labor force was 1.284 million, with an average of 76,300 unemployed, CY 2016. Metropolitan Statistical Areas for counties with major travel and tourism activity had unemployment rates of 6.1 percent for Gulfport-Biloxi-Pascagoula (Hancock, Harrison and Jackson counties); 5.4 percent for Hattiesburg (Forrest, Lamar and Perry); 5 percent for Jackson (Copiah, Hinds, Madison, Rankin, Simpson and Yazoo). DeSoto County's CY 2016 unemployment rate was 4.3 percent; Tunica County: 7.1 percent.

Travel and Tourism Employment Multipliers

IMPLAN includes 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 2015 and FY 2016 employment multipliers for

Mississippi were 1.38 and 1.43, respectively. The 85,135 estimated statewide direct FY 2015 travel and tourism jobs resulted in an additional 32,550 indirect plus induced jobs. The 86,600 statewide FY 2016 direct travel and tourism jobs resulted in an additional 37,580 indirect plus induced, or secondary, jobs. FY 2016 jobs associated with travel and tourism totaled 124,180, 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). FY 2015 travel and tourism labor income multiplier for Mississippi was 1.52. The total labor income for FY 2015 was \$2.79 billion, made up of \$1.84 billion direct and \$950 million in indirect and induced income. Mississippi's FY 2016 travel and tourism labor income multiplier was 1.61, with \$1.86 billion in direct and \$1.13 billion in indirect and induced or secondary income, for total labor income of \$2.99 billion. IMPLAN codes were used to compute these multipliers.

\$2.99 BILLION
TOTAL LABOR INCOME
FOR FY 2016

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. It's 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. IMPLAN 2015 data intersect, but are not identical with, study data. Multipliers from a statewide input-output model cannot be modified on a short-term basis for use by

counties/cities. 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 2016 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-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 also secured for federal entities with an October-to-September fiscal year: Vicksburg National Military Park, Natchez National Historical Park, 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. The Department of Revenue provided most of the statewide and county revenue figures. They

facilitated sales and tax collections for food and beverage, lodging, retail trade, transportation and attractions/entertainment/recreation information.

Mississippi Gaming Commission quarterly surveys supply lodging variables in the state-licensed casino hotels, advertising expenditures and capital investment. Other state agencies surveyed with a travel and tourism connection include the Mississippi Arts Commission; the Mississippi Department of Archives and History; the Department of Wildlife, Fisheries and Parks; the Mississippi Museum of Natural Science and the Pearl River Water Supply District.

FY 2016 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 web site. Sources for sales of petroleum products into Mississippi were MDA Energy Division, the Department of Revenue and the Mississippi Department of Transportation. The Petroleum Tax Division of the 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 2015 and FY 2016

CATEGORY	FY 2015	FY 2016	CHANGE
Food services and drinking establishments (1)	28,855	30,082	4.3%
Lodging, excluding all casino hotels (2)	12,670	12,960	2.3%
Gaming, state-licensed casinos and hotels (3)	22,237	22,543	1.4%
Retail trade (4)	9,885	10,067	1.8%
Support activities, air transportation (5)	1,762	1,583	-10.2%
Air passenger, scheduled and chartered (5)	215	218	1.4%
Scenic and sightseeing transportation	25	17	-32.0%
Charter bus industry	110	112	1.8%
Taxi and limo service	48	40	-16.7%
Amtrak, other bus transportation	76	73	-3.9%
Sub-total, transportation	2,236	2,043	-8.6%
Travel arrangement/reservations	397	381	-4.0%
Passenger car rental	387	400	3.4%
Automotive repair and maintenance services	306	314	2.6%
Parking lots and garages	13	14	7.7%
Advertising and related services	234	257	9.8%
Laundry services	168	149	-11.3%
Sub-total, other services	1,505	1,515	0.7%
Motion picture theaters	143	145	1.4%
Motion picture and video production	257	154	-40.1%
Museums, historical sights and similar (6)	344	349	1.5%
Performing arts, spectator sports and related	690	650	-5.8%
Amusement parks, bowling, golf courses, marinas	1,125	1,154	2.6%
Federal, state, local tourism agencies/offices (7)	773	726	-6.1%
Selected convention centers and arenas	93	92	-1.1%
Gaming, lodging, other at tribal resorts (8)	1,804	1,815	0.6%
Selected outdoor recreation (9)	518	520	0.4%
Construction (10)	2,000	1,785	-10.8%
Total	85,135	86,600	1.7%

1. Alcohol/nonalcohol restaurants, drinking establishments, among other establishments.
2. Estimates based on Mississippi Department of Employment Security data for hotels and 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 casino hotel employees.
4. FY 2016 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.
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.
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, Pearl River Basin Development District 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; Department of Revenue; Mississippi Arts Commission; Mississippi Department of Archives and History; Mississippi Department of Employment Security, Labor Market Information Department; 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, Vicksburg National Military Park; Visit Mississippi.

APPENDIX B

Estimated Travel and Tourism Direct Payroll, by Component, FY 2015 and FY 2016

CATEGORY	FY 2015	FY 2016	CHANGE
Food services and drinking establishments	\$388,219,931	\$414,570,794	6.8%
Lodging (1)	\$200,591,486	\$207,568,017	3.5%
Gaming (2)	\$658,163,526	\$679,541,480	3.2%
Retail trade (3)	\$189,779,083	\$201,122,295	6.0%
Support activities, air transportation	104,384,046	68,333,180	-34.5%
Air passenger, scheduled and chartered	7,428,691	8,502,874	14.5%
Scenic and sightseeing transportation	811,491	574,872	-29.2%
Charter bus industry	2,562,338	2,920,269	14.0%
Taxi and limo service	823,596	817,589	-0.7%
Amtrak, other bus transportation	5,207,121	5,118,755	-1.7%
Sub-total, transportation	\$121,217,283	\$86,267,539	-28.8%
Travel arrangement/reservations	11,329,890	11,593,648	2.3%
Passenger car rental	8,767,046	9,291,254	6.0%
Automotive repair and maintenance services	10,054,026	10,762,324	7.0%
Parking lots and barages	204,936	204,666	-0.1%
Advertising and related services	8,631,578	9,321,479	8.0%
Laundry services	3,130,197	3,083,423	-1.5%
Sub-total, other services ^v	\$42,117,673	\$44,256,794	5.1%
Motion picture theaters	1,494,794	1,524,774	2.0%
Motion picture and video production	14,702,510	6,481,374	-55.9%
Museums, historical sights and similar	10,008,932	10,014,091	0.1%
Performing arts, spectator sports, related	14,249,972	14,181,536	-0.5%
Amusement parks, bowling, golf courses, marinas	18,475,297	19,158,666	3.7%
Selected convention centers and arenas	2,206,125	2,274,000	3.1%
Federal, state, local tourism agencies (4)	39,811,563	40,285,723	1.2%
Gaming, lodging, other at tribal resorts (5)	54,000,000	55,000,000	1.9%
Selected outdoor recreation (6)	9,027,506	9,023,522	None
Construction (7)	\$73,337,762	\$69,734,006	-4.9%
TOTAL	\$1,837,403,443	\$1,861,004,611	1.3%

- 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 2014-June 2015 and July 2015-June 2016 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.
- 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.
Note: These are nominal dollar amounts; not adjusted for inflation.

SOURCES

Convention and visitor bureaus and other tourism offices; Department of Revenue; Mississippi Arts Commission; Mississippi Department of Archives and History; Mississippi Department of Employment Security, Labor Market Information Department; 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, Vicksburg National Military Park; Visit Mississippi.

APPENDIX C

Estimated Travel and Tourism Expenditures by Visitors, FY 2015 and FY 2016

CATEGORY	FY 2015	FY 2016	CHANGE
Food services and drinking establishments (1)	\$1,148,969,575	\$1,195,397,212	4.0%
Specialty food, liquor stores and vending machines	132,731,057	132,620,778	-0.1%
Lodging (2)	857,820,438	905,859,847	5.6%
Gaming (3)	1,428,867,646	1,450,118,988	1.5%
All Retail, excluding gasoline/service stations (4)	1,650,376,181	1,696,474,612	2.8%
Gasoline/service stations, convenience stores, fuel	700,663,709	660,655,318	-5.7%
Fixed facilities, air transportation (5)	12,066,112	959,308	-92.0%
Passenger car rental leasing	31,450,145	34,475,178	9.6%
Auto repair shops, accessories, mechanics, car wash	55,265,291	57,171,215	3.4%
Rail and water passenger transportation (6)	10,929,551	10,675,468	-2.3%
Entertainment/athletic events/outdoor recreation (7)	68,093,161	84,332,357	23.8%
Consumer Goods Rental	60,923,662	61,382,547	0.8%
Advertising Specialties	1,271,934	1,448,779	13.9%
Printing and Publishing	1,601,157	NA	NA
Laundries, Dry Cleaning	5,420,504	5,278,286	-2.6%
TOTAL	\$6,166,450,123	\$6,296,849,893	2.1%

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

1. Includes all restaurants and drinking establishments.
2. The FY 2015 and FY 2016 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 FY 2015 and 28 in FY 2016.
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; drugstores; gaming retail; specialty food, liquor stores, supermarkets and grocery stores; RV dealers, motorcycle, boat and other motor vehicle dealers; jewelry, florists; pharmacies; drugstores and 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 2015 and FY 2016, based on scheduled/charter passenger service and passenger facility charges. Incomplete data for FY 2016.
6. Amtrak ticket sales included for both FY 2015 and FY 2016.
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 industries, 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; 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 2015 and FY 2016

CATEGORY	FY 2015	FY 2016	CHANGE
Food services and drinking establishments	\$48,200,000	\$50,128,000	4.0%
Specialty food, liquor stores, vending machines	\$5,502,469	\$5,485,363	-0.3%
Lodging (1)	35,143,901	37,100,000	5.6%
State-licensed casino gaming (2)	89,861,241	92,000,000	2.4%
All retail, including gasoline service stations (3)	69,213,979	69,421,622	0.3%
Rental and leasing, other transportation (4)	1,500,000	1,611,461	7.4%
Auto repair shops, accessories, mechanics, car wash	2,335,247	2,399,840	2.8%
Entertainment/outdoor recreation (5)	2,182,094	2,466,919	13.1%
Advertising specialties	53,443	63,283	18.4%
Printing and publishing	66,906	NA	NA
Laundries, dry cleaning	226,180	221,658	-2.0%
Construction activity tax (6)	7,242,136	5,663,350	-21.8%
Personal income/sales tax (7)	101,403,918	103,699,334	2.3%
Alcoholic beverages (8)	15,925,423	15,466,247	-2.9%
Use tax (9)	9,811,547	9,372,127	-4.5%
TOTAL	\$388,668,484	\$395,099,204	1.7%

1. Statewide and city data from STR were used for this estimate.
 2. Approximately \$92 million, or 68.7 percent of the \$133.8 million in General Fund gaming fees and tax transfers, were the "net" travel and tourism portion. The other \$41.8 million, or 31.3 percent, were not attributed to travel and tourism. This does not include \$36 million diverted to the Mississippi Department of Transportation'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; camera and photographic stores; antique (used merchandise) stores; cigar stores and stands; gaming retail; gasoline and diesel fuel at 18 cents; 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, drugstores and 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.
 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 2016 estimate comprised 88.2 percent of the total transfers to the General Fund and also applying a travel and tourism factor.
 9. The FY 2016 estimate comprised 76.6 percent of the total transfers to the General Fund and also applying a travel and tourism factor.
- Note: All dollar amounts are the estimated "net" travel and tourism portion.

SOURCES: Department of Revenue; Mississippi Department of Employment Security, Labor Market Information Department; 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 2015

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Adams	\$114,660,317	2,300	20.4	\$11,884,763	\$2,027,813
Alcorn	56,391,847	770	5.5	4,605,026	1,463,166
Amite	2,035,909	28	1.7	192,712	450,747
Attala	16,697,705	230	4.9	1,236,689	841,169
Benton	809,724	12	0.9	77,045	215,537
Bolivar	43,737,304	600	5.2	3,997,815	1,793,342
Calhoun	3,433,332	45	1.5	286,954	565,854
Carroll	599,208	9	0.8	59,659	11
Chickasaw	5,571,694	75	1.4	440,553	253,397
Choctaw	717,803	10	0.6	70,707	24,510
Claiborne	2,950,853	42	1.3	275,244	337,023
Clarke	4,218,048	60	2.0	341,757	96,328
Clay	18,727,485	260	5.1	1,574,801	44,000
Coahoma	67,864,898	960	12.0	7,468,055	1,143,051
Copiah	7,964,169	110	1.5	606,039	701,384
Covington	9,831,893	135	2.7	782,743	390,351
DeSoto	305,731,363	4,140	7.5	26,873,037	11,698,615
Forrest^	268,054,502	4,135	7.1	23,302,096	10,661,957
Franklin	1,198,517	17	1.1	123,158	325,952
George	10,071,450	140	2.6	750,219	61,939
Greene	2,011,621	27	1.4	188,734	96,738
Grenada	48,474,598	745	7.1	4,150,025	179,082
Gulf Coast**	1,882,172,688	25,025	16.4	210,926,482	172,155,260
Hinds	364,054,770	7,000	5.3	35,968,967	16,345,188
Holmes	3,522,298	48	1.3	323,017	391,750
Humphreys	2,294,482	30	1.5	205,581	0
Issaquena	179,478	3	1.9	16,198	190
Itawamba	14,849,503	200	3.2	1,259,055	0
Jasper	3,272,024	45	1.2	281,277	2,343,134

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/ Fees Attributed to Tourism*****	Tourism Capital Investment
Jefferson	978,645	14	1.0	103,472	199,834
Jefferson Davis	2,553,326	35	2.2	228,422	19,611
Jones	60,293,013	860	2.9	5,334,694	2,298,257
Kemper	1,671,432	23	0.5	167,343	0
Lafayette	134,829,080	1,800	8.4	11,517,106	16,694,786
Lamar^					
Lauderdale	165,835,067	2,070	6.0	14,482,854	456,845
Lawrence	2,862,987	37	1.5	242,879	143,032
Leake	8,447,235	120	2.5	668,974	119,909
Lee	253,044,996	3,860	7.4	22,338,391	5,053,383
Leflore	49,457,745	740	5.4	3,739,912	1,963,407
Lincoln	36,987,309	500	4.4	3,030,527	593,876
Lowndes	115,619,629	1,530	6.0	10,388,772	2,274,841
Madison	223,063,201	2,900	5.3	18,285,512	7,670,636
Marion	12,438,652	155	2.0	939,206	864,775
Marshall	15,177,579	215	3.6	1,254,382	6,021,517
Monroe	16,976,463	235	2.4	1,314,794	1,001,165
Montgomery	10,747,345	150	5.9	925,360	20,352
Neshoba#	36,691,282	2,000	16.0	2,826,677	427,114
Newton	6,750,804	90	1.5	487,740	428,729
Noxubee	5,420,669	72	2.9	438,984	237,316
Oktibbeha	93,477,550	1,300	6.1	8,677,641	1,201,973
Panola	45,432,360	630	5.7	3,762,526	1,556,035
Pearl River	29,533,122	400	4.0	2,508,240	96,525
Perry	2,443,427	33	1.6	219,543	255,244
Pike	43,827,314	600	4.1	4,003,061	231,870
Pontotoc	10,174,083	125	1.0	788,193	799,494
Prentiss	7,952,658	105	1.4	602,548	45,236
Quitman	1,072,926	15	1.4	110,415	294,912
Rankin	242,756,037	3,360	5.2	23,502,120	7,263,400
Scott	20,424,301	275	2.2	1,567,906	1,121,961
Sharkey	2,289,472	30	2.7	146,457	0

County	Travel and Tourism Expenditures by Visitors ***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/Fees Attributed to Tourism *****	Tourism Capital Investment
Simpson	21,383,435	280	3.6	1,617,790	430,357
Smith	2,084,831	28	1.0	169,301	13,224
Stone	12,433,091	170	4.4	996,616	332,468
Sunflower	14,017,398	190	2.3	1,199,307	3,772,330
Tallahatchie	2,039,008	28	0.9	194,366	540,482
Tate	10,808,749	145	2.6	907,031	429,410
Tippah	7,724,366	105	1.8	670,422	21,294
Tishomingo	15,825,458	210	3.7	1,292,095	0
Tunica	586,802,764	6,100	67.9	76,245,246	1,981,168
Union	21,216,933	280	2.7	1,939,009	1,333,397
Walthall	2,118,110	30	1.2	220,188	0
Warren	201,808,459	3,940	19.1	21,593,166	1,493,133
Washington	88,556,616	1,480	8.5	9,518,820	2,264,424
Wayne	8,437,151	112	2.3	649,659	180,839
Webster	2,566,089	35	1.8	218,611	92,104
Wilkinson	3,127,805	45	2.7	274,658	144,426
Winston	16,080,434	225	5.0	1,247,405	15,053
Yalobusha	3,509,732	48	1.5	288,838	541,958
Yazoo	14,858,365	204	3.2	1,384,980	915,256
Other*	209,722,137			22,585,315	
Total	\$6,166,450,123	85,135	7.6	\$626,085,882	\$298,464,846

* Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the non-resident 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.

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.

^ Lamar County data included with Forrest County as Hattiesburg Area.

** Gulf Coast reflects combined data for Hancock, Harrison and Jackson counties.

*** These are nominal dollar amounts; not adjusted for inflation. Appendix E reflects July 2014-June 2015 data.

**** 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.

***** Estimated state and 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.

SOURCES: Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Department of Revenue; Dodge Data Analytics; Mississippi Department of Employment Security, Labor Market Information Department; 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 2016

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/Fees Attributed to Tourism*****	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^	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**	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
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

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/Fees Attributed to Tourism*****	Tourism Capital Investment
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^					
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#	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
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^					
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

County	Travel and Tourism Expenditures by Visitors***	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage****	State/Local Taxes/Fees Attributed to Tourism*****	Tourism Capital Investment
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
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*	160,905,539			14,833,287	
TOTAL	\$6,296,849,893	86,600	7.6	\$638,984,005	\$255,094,751

* Other includes estimated gasoline sales and taxes for some Mississippi counties, diesel fuel sales, the non-resident 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 F has estimated travel and tourism expenditures at state-licensed casinos in these counties: Adams, Coahoma, Hancock, Harrison, Tunica, Warren and Washington.

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.

^ Lamar and Perry counties data included with Forrest County as Hattiesburg Area.

** Gulf Coast reflects combined data for Hancock, Harrison and Jackson Counties.

*** These are nominal dollar amounts not adjusted for inflation. Appendix F reflects July 2015-June 2016 data.

**** 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.

***** Estimated state and 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.

SOURCES: Chambers of commerce and other economic development and tourism offices; county tax assessors and collectors; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; 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 2016

CAPITAL/RIVER REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes Attributed to Travel and Tourism**	Tourism Capital Investment
Adams	\$110,807,342	2,275	20.4	\$11,424,161	\$2,572,253
Amite	1,868,248	25	1.5	184,851	81,564
Claiborne	3,196,526	44	1.2	297,217	124,746
Copiah	8,764,952	115	1.6	677,450	97,080
Franklin	1,233,772	17	1.1	128,447	128,926
Hinds	361,697,251	6,940	5.3	35,913,954	39,847,928
Jefferson	1,031,210	14	1.1	107,583	151,774
Lawrence	2,982,939	38	1.5	264,824	73,842
Lincoln	40,602,151	510	4.3	3,138,061	192,770
Madison	231,632,182	3,000	5.2	18,997,473	3,623,595
Pike	41,258,846	580	3.9	3,718,974	710,668
Rankin	252,209,181	3,400	5.1	23,588,196	16,338,493
Simpson	21,311,936	285	3.9	1,619,841	109,063
Walthall	2,498,077	34	1.4	249,939	129,894
Warren	203,822,874	3,950	19.2	22,128,458	1,415,522
Wilkinson	3,086,200	45	2.5	276,459	272,964
Regional Totals	\$1,288,003,687	21,272	6.2	\$122,715,888	\$65,871,082

Does not include diesel fuel sales, or non-resident licensing fees, or Department of Revenue data not attributable to a particular county. Gasoline sales at the pump are included for some counties.

* 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.

** Estimated state and 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; 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; 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; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; 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 2016

COASTAL REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes Attributed to Travel and Tourism**	Tourism Capital Investment
Covington	\$9,917,385	135	2.7	\$800,248	\$695,767
Forrest [^]	273,674,739	4,200	6.7	24,324,678	23,824,338
George	10,458,310	145	2.9	794,563	276,193
Greene	2,102,830	28	1.5	199,459	254,588
Gulf Coast [†]	1,989,110,418	26,000	16.9	225,915,187	81,036,614
Jefferson Davis	2,675,842	36	2.2	239,307	0
Jones	59,622,938	850	2.9	5,351,927	2,139,267
Lamar [^]					
Marion	12,610,416	155	1.9	952,303	39,158
Pearl River	31,178,230	415	4.1	2,620,641	520,940
Perry [^]					
Stone	12,970,104	175	4.5	1,048,890	153,845
Wayne	8,193,643	110	2.3	636,727	126,763
Regional Totals	\$2,412,514,855	32,249	11.4	\$262,883,930	\$109,067,473

Does not include diesel fuel sales, non-resident licensing fees, or Department of Revenue data not attributable to a particular county. Includes gasoline sales at the pump for Hancock, Harrison, Jackson and some other counties.

[^] Lamar and Perry counties data are included with Forrest County as the tri-county Hattiesburg Area.

[†] Gulf Coast reflects combined data for Hancock, Harrison and Jackson counties.

* 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.

** Estimated state and 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; 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; 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; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; 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 Improvements, FY 2016

DELTA REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes Attributed to Travel and Tourism**	Tourism Capital Investment
Bolivar	\$48,981,351	630	5.3	\$4,488,641	\$441,190
Carroll	867,557	12	1.1	87,143	293,884
Coahoma	65,990,487	955	12.0	7,507,446	815,365
Holmes	3,489,443	48	1.3	310,009	233,550
Humphreys	2,270,679	30	1.5	206,573	126,469
Issaquena	147,720	2	1.4	15,084	1,049
Leflore	50,580,536	745	5.4	3,873,594	1,789,768
Quitman	1,048,208	15	1.4	111,224	72,779
Sharkey	1,431,026	20	1.9	124,117	0
Sunflower	14,529,614	195	2.3	1,293,842	643,992
Tallahatchie	2,005,086	28	0.9	194,782	0
Tunica	556,989,166	5,800	62.2	69,871,341	483,542
Washington	87,070,747	1,465	8.5	9,378,151	2,237,396
Yazoo	14,903,475	205	3.2	1,417,803	800,000
Regional Totals	\$850,305,095	10,150	11.6	\$98,879,750	\$7,938,984

Does not include diesel fuel sales, non-resident licensing fees, or Department of Revenue data not attributable to a particular county. Includes gasoline sales at the pump for some counties.

* 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.

** Estimated state and 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; 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; 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; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; 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 Improvements, FY 2016

HILLS REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes Attributed to Travel and Tourism**	Tourism Capital Investment
Alcorn	\$61,558,708	790	6.7	\$5,076,778	\$375,825
Benton	880,419	12	0.9	83,401	51,506
Calhoun	3,519,142	46	1.6	302,244	360,208
DeSoto	335,776,712	4,400	7.7	31,835,325	4,416,845
Grenada	49,136,078	750	7.0	4,231,610	116,250
Itawamba	15,497,950	205	3.1	1,358,248	176,908
Lafayette	153,666,553	2,000	8.9	13,206,007	21,913,805
Lee	261,995,526	3,910	7.4	23,219,899	4,263,661
Marshall	15,580,508	220	3.5	1,196,473	2,695,143
Panola	49,384,366	660	5.9	4,222,920	334,121
Pontotoc	11,177,078	135	1.1	878,741	182,407
Prentiss	7,918,218	105	1.4	604,818	198,390
Tate	11,011,510	150	2.7	914,699	885,314
Tippah	7,980,882	105	1.8	691,033	505,775
Tishomingo	15,831,326	210	3.5	1,228,413	0
Union	21,934,649	290	2.7	2,035,860	379,498
Yalobusha	3,884,239	50	1.6	302,381	211,665
Regional Totals	\$1,026,733,864	14,038	5.9	\$91,388,850	\$37,067,321

Does not include diesel fuel sales, non-resident licensing fees, or Department of Revenue data not attributable to a particular county. Includes gasoline sales at the pump for some counties.

* 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.

** Estimated state and 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; 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; 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; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; 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 Improvements, FY 2016

PINES REGION	Travel and Tourism Expenditures by Visitors	Direct Travel and Tourism Employment	Travel and Tourism Employment Percentage*	State and Local Taxes Attributed to Travel and Tourism**	Tourism Capital Investment
Attala	\$17,675,318	235	5.2	\$1,321,853	\$734,602
Chickasaw	5,731,761	77	1.4	450,643	103,250
Choctaw	1,231,039	17	0.6	107,977	87,016
Clarke	4,218,048	60	5.0	353,503	215,525
Clay	19,179,765	260	2.0	1,622,016	445,624
Jasper	3,316,358	45	1.2	293,502	287,494
Kemper	1,636,335	23	0.8	168,712	14,137
Lauderdale	163,398,853	2,040	5.9	14,398,098	5,042,098
Leake	8,452,909	120	2.4	688,559	570,580
Lowndes	118,402,730	1,545	6.0	10,642,600	2,033,507
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 [#]	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
Scott	20,805,875	280	2.2	1,601,459	731,642
Smith	2,134,341	28	1.0	174,559	0
Webster	2,491,618	34	1.8	219,320	224,819
Winston	17,364,225	240	5.2	1,377,323	518,815
Regional Totals	\$560,882,229	8,891	5.3	\$48,290,310	35,149,891

[#] Neshoba County employment figures do not reflect estimated Pearl River Resort employment - rough estimate - from separate sources. Pearl River Resort travel and tourism expenditures by visitors: not available. Does not include diesel fuel sales, non-resident licensing fees, or Department of Revenue data not attributable to a particular county. Includes gasoline sales at the pump for some counties.

* 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.

** Estimated state and 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; 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; 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; Department of Revenue; Dodge Data Analytics, Mississippi Department of Employment Security, Labor Market Information Department; Mississippi Department of Transportation; Mississippi Department of Wildlife, Fisheries and Parks; Mississippi Gaming Commission.

APPENDIX M

Estimated Hotel/Motel Room Count, CY 2015/CY 2016

County	Hotel/Motel Rooms (12-31-15)	Hotel/Motel Rooms (12-31-16)	Percentage Change
Adams	1,014	1,026	1.2%
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	2,902	2,952	1.7%
Forrest*	2,710	2,780	2.6%
Franklin	0	0	NA
George	129	129	none
Greene	0	0	NA
Grenada	631	631	none
Gulf Coast#	14,094	14,513	3.0%
Hinds	5,582	5,573	-0.2%
Holmes	40	40	none
Humphreys	30	30	none
Issaquena	0	0	NA
Itawamba	133	133	none

Appendix M continued

County	Hotel/Motel Rooms (12-31-15)	Hotel/Motel Rooms (12-31-16)	Percentage Change
Jasper	27	27	none
Jefferson	0	0	NA
Jefferson Davis	30	30	none
Jones	833	833	none
Kemper	32	32	none
Lafayette	925	1,050	13.5%
Lamar*			
Lauderdale	1,992	2,058	3.3%
Lawrence	30	30	none
Leake	57	57	none
Lee	1,886	1,848	-2.0%
Leflore	825	825	none
Lincoln	487	487	none
Lowndes	1,256	1,288	2.5%
Madison	2,305	2,305	none
Marion	191	191	none
Marshall	190	190	none
Monroe	212	251	18.4%
Montgomery	216	216	none
Neshoba	1,551	1,551	none
Newton	87	87	none
Noxubee	64	64	none
Oktibbeha	873	873	none
Panola	579	611	5.5%
Pearl River	267	267	none
Perry*			
Pike	607	607	none
Pontotoc	56	56	none
Prentiss	100	100	none
Quitman	0	0	NA
Rankin	2,489	2,652	6.5%

County	Hotel/Motel Rooms (12-31-15)	Hotel/Motel Rooms (12-31-16)	Percentage Change
Scott	221	221	none
Sharkey	19	19	none
Simpson	230	230	none
Smith	32	32	none
Stone	184	184	none
Sunflower	203	234	15.3%
Tallahatchie	0	0	NA
Tate	131	131	none
Tippah	77	77	none
Tishomingo	113	76	-32.7%
Tunica	4,721	4,744	0.5%
Union	344	344	none
Walthall	30	30	none
Warren	2,217	2,216	none
Washington	1,172	1,172	none
Wayne	129	129	none
Webster	47	33	-29.8%
Wilkinson	18	18	none
Winston	243	243	none
Yalobusha	20	20	none
Yazoo	225	225	none
Total	58,305	59,268	1.7%

Appendix M does not include bed and breakfast tooms, hotel/motel rooms under construction January-March 2017, cabins, or condo/timeshare/cottage rooms. County room counts are based on figures provided by various sources. A different official may have furnished data between one year and the next. STR inventory data were used for 2015-2016 updates. Some counties had room inventory changes: closings, additions or renovations.

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

STR lodging inventory as of December 31, 2015: 683 hotels/motels and 58,295 rooms.

* Gulf Coast is the combination of Hancock, Harrison and Jackson counties.

* Lamar and Perry counties totals are included in Forrest County, as part of the Hattiesburg Area. Perry County does not have any hotels or motels.

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 2015/FY 2016

Park	FY 2015 Visits	FY 2016 Visits	Change
Buccaneer State Park	214,129	193,094	-9.8%
Clark Creek	9,226	15,123	63.9%
Clarkco	58,792	43,604	-25.8%
George P. Cossar	28,076	32,118	14.4%
Golden Memorial	1,429	1,406	-1.6%
Holmes County	6,300	none	NA
Hugh White	35,034	38,183	9.0%
J.P. Coleman	47,930	51,627	7.7%
John W. Kyle	49,587	52,384	5.6%
Lake Lincoln	41,886	44,935	7.3%
Lake Lowndes	41,691	33,175	-20.4%
LeFleur's Bluff	35,977	33,043	-8.2%
Legion	8,769	10,585	20.7%
Leroy Percy	9,341	10,043	7.5%
Natchez	27,960	30,419	8.8%
Paul B. Johnson	111,439	224,044	101.0%
Percy Quin	97,779	106,740	9.2%
Roosevelt	90,991	94,309	3.6%
Tishomingo	55,697	63,123	13.3%
Tombigbee	17,526	24,761	41.3%
Trace	55,144	59,760	8.4%
Wall Doxey	26,343	28,445	8.0%
Total	1,071,046	1,190,921	11.2%

SOURCE: Mississippi Department of Wildlife, Fisheries and Parks.

APPENDIX O

Mississippi Nonfarm Establishment-Based Employment Rankings, Direct Jobs, Top Sectors, FY 2016

Sector	FY 2016 Establishment Based Employment	FY 2016 Employment Percentage	FY2016 Private Sector Rank
Manufacturing (1)	143,190	12.6%	1
Retail trade (2)	130,010	11.4%	2
Health care and social assistance-private (3)	126,965	11.1%	3
Travel and tourism (4)	86,600	7.6%	4
Administrative support and waste management	62,210	5.5%	5
Leisure accommodation and food services (5)	60,000	5.3%	6
Construction (6)	44,965	3.9%	7
Transportation and warehousing (7)	43,470	3.8%	8
Other services (8)	39,620	3.5%	9
Wholesale trade	34,075	3.0%	10
Finance and insurance	31,790	2.8%	11
Professional, scientific and technical services (9)	30,345	2.7%	12
Information (10)	13,100	1.1%	13
Education services	12,460	1.1%	14
Management of companies	10,740	0.9%	15
Real estate and rental (11)	10,675	0.9%	16
Utilities	7,760	0.7%	17
Mining and logging	7,525	0.7%	18
Leisure arts, entertainment and recreation (12)	1,935	0.2%	19
Government (13)	243,250	21.3%	NA
Total statewide nonfarm direct employment	1,140,685	100.0%	NA

- Durable goods comprised 95,332 jobs, or 66.6 percent of manufacturing jobs.
- Does not include an estimated 10,067 travel and tourism jobs directly related to retail trade.
- Does not include any public sector health care jobs. Those are included under government.
- 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. 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 2016 statewide travel and tourism jobs.
- Reflects portion of employment not directly related to travel and tourism, e.g., food services and drinking establishments.
- Excludes travel and tourism-related construction.
- 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.
- Excludes travel and tourism related laundry services and parking lots and garages.
- Excludes travel and tourism related advertising and travel arrangement and reservation services.
- Excludes motion picture and video production and motion picture theaters related to travel and tourism.
- Excludes travel and tourism related residential property managers and passenger car rental.
- Includes non-travel and tourism employment, estimated portion attributed to locals.
- Excludes an estimated 1,975 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 2016

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2016 Room Tax Revenue	Gross FY 2016 Restaurant Tax Revenue	Gross FY 2016 Total Tax Revenue
Aberdeen	1.0	1.0	\$5,000	\$83,230	\$88,230
Baldwyn	None	2.0	None	142,682	142,682
Batesville	3.0	3.0	259,355	998,258	1,257,613
Bay Springs	3.0	None	3,791	None	3,791
Brandon	None	2.0	None	1,041,813	1,041,813
Brookhaven	2.0	None	92,231	None	92,231
Byhalia	2.0	None	14,342	None	14,342
Canton	2.0	2.0	128,419	497,268	625,687
Cleveland	2.0	2.0	100,000	703,745	803,745
Clinton	2.0	None	163,080	None	163,080
Coahoma County	2.0	1.0	115,984	289,073	405,057
Columbus-Lowndes	2.0	2.0	293,491	1,903,130	2,196,621
Como	\$1 per night	2.0	1,250	73,362	74,612
Corinth	2.0	2.0	115,000	1,225,323	1,340,323
DeSoto County ^{&}	2.0	2.0	1,264,243	6,918,200	8,182,443
Florence	None	2.0	None	319,948	319,948
Flowood	None	2.0	None	2,620,306	2,620,306
Fulton	3.0	None	57,908	None	57,908
Greenwood	1.0	1.0	91,671	336,980	428,651
Grenada	2.0	1.0	146,346	355,170	501,516
Hancock County	2.0	None	128,072	None	128,072
Harrison County [*]	5.0	None	7,229,495	None	7,229,495
Hattiesburg	2.0	2.0	651,756	4,850,854	5,502,610
Hernando	3.0	None	35,921	None	35,921
Holly Springs	2.0	2.0	26,940	312,861	339,801
Horn Lake	\$2 per night	None	284,732	None	284,732
Indianola	2.0	2.0	38,030	379,711	417,741
Jackson (city) ^{**}	4.0	2.0	2,627,458	6,132,082	8,759,540

Appendix P continued

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2016 Room Tax Revenue	Gross FY 2016 Restaurant Tax Revenue	Gross FY 2016 Total Tax Revenue
Jackson County^	2.0	None	422,065	None	422,065
Kosciusko	2.0	None	30,499	None	30,499
Lauderdale County	2.5	None	786,914	None	786,914
Laurel	2.0	2.0	170,753	1,301,627	1,472,380
Louisville	2.0	None	49,359	None	49,359
Magee	1.0	1.0	26,734	221,573	248,307
McComb	3.0	None	233,400	None	233,400
Montgomery County	2.0	None	45,957	None	45,957
Moss Point	3.0	None	266,953	None	266,953
Natchez#	3.0 plus \$2	1.5	937,534	799,312	1,736,846
New Albany	2.0	2.0	76,787	669,671	746,458
Newton	\$1/room night	None	9,030	None	9,030
Ocean Springs	2.0	2.0	38,352	1,231,739	1,270,091
Oxford	2.0	2.0	400,843	2,808,710	3,209,553
Pascagoula	3.0	None	162,550	None	162,550
Pearl	None	2.0	None	747,119	747,119
Philadelphia	3.0	None	99,944	None	99,944
Picayune	2.0	1.0	61,220	414,339	475,559
Pontotoc	2.0	2.0	8,286	398,690	406,976
Rankin County	2.0	None	1,014,783	None	1,014,783
Richland	None	2.0	None	391,033	391,033
Ridgeland	1.0	1.0	376,042	1,273,904	1,649,946
Ripley	2.0	2.0	10,298	279,549	289,847
Sardis	3.0	3.0	10,932	94,061	104,993
Senatobia	2.0	2.0	11,679	439,401	451,080
Southaven	1.0	1.0	307,278	1,553,603	1,860,881
Starkville	2.0	2.0	251,563	1,936,537	2,188,100
Stone County	2.0	2.0	31,893	368,271	400,164
Tishomingo County	2.0	None	23,600	None	23,600
Tunica County	3.0	3.0	718,849	977,286	1,696,135
Tupelo	2.0	2.0	594,058	3,631,152	4,225,210

Tourism Office, City/County Tourism Council, Bureau	Room Tax Percentage	Restaurant Tax Percentage	Gross FY 2016 Room Tax Revenue	Gross FY 2016 Restaurant Tax Revenue	Gross FY 2016 Total Tax Revenue
Vicksburg	3.0	1.0	850,428	914,184	1,764,612
Washington County	3.0	1.0	332,309	574,927	907,236
West Point	2.0	2.0	54,479	459,462	513,941
Yazoo County	2.0	2.0	63,891	408,154	472,045
Total			\$22,353,777	\$51,078,300	\$73,432,077

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 2014-August 2015 collection (July 2014-June 2015 Sales).

* A 3-percent city lodging tax plus a flat occupancy tax of \$2 per occupied room, per night.

** Includes a 75 cents per night charge per occupied room.

§ DeSoto County receives 2 percent of the 3-percent city-plus-county lodging tax.

^ Jackson County 2-percent countywide lodging tax first collected December 2015. This Jackson County lodging tax goes to the Visit Mississippi Gulf Coast CVB.

* The 5-percent lodging tax is broken down by 55 percent to the board of supervisors and 45 percent to Visit Mississippi Gulf Coast CVB.

Some figures may reflect adjustments\overpayments.

SOURCE: Department of Revenue.

TABLE 1

Origin of Highway Welcome Center Registrants by U.S. and International Travelers, FY 2015 and FY 2016

Origin	FY 2015 Registrants	FY 2016 Registrants	Percentage Change
States	1,952,256	1,890,855	-3.1%
Countries	68,857	66,364	-3.6%
Total	2,021,113	1,957,219	-3.2%

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 2015 and FY 2016

State	FY 2015	FY 2016	Percentage Change	State's share of FY 2016 visitors
Mississippi	338,459	339,116	0.2%	17.9%
Louisiana	288,785	295,198	2.2%	15.6%
Alabama	195,635	183,671	-6.1%	9.7%
Texas	186,913	177,628	-5.0%	9.4%
Florida	136,334	132,933	-2.5%	7.0%
Georgia	116,736	109,298	-6.4%	5.8%
Tennessee	112,606	108,724	-3.4%	5.7%
Arkansas	77,047	78,961	2.5%	4.2%
Missouri	64,737	65,495	1.2%	3.5%
Illinois	49,799	47,280	-5.1%	2.5%
Other	385,205	352,551	-8.5%	18.6%
Total	1,952,256	1,890,855	-3.1%	100%

SOURCE: Visit Mississippi.

TABLE 3

Highway Welcome Center Registrants, Top 10 Countries, FY 2016

Country	Registrants	Percentage of Countries	Percentage of Top 10
Canada	18,042	27.2%	33.3%
England	9,553	14.4%	17.6%
Germany	7,923	11.9%	14.6%
Australia	5,428	8.2%	10.0%
France	4,680	7.1%	8.6%
Mexico	3,068	4.6%	5.7%
Holland	2,317	3.5%	4.3%
Switzerland	1,260	1.9%	2.3%
Belgium	1,006	1.5%	1.9%
New Zealand	957	1.4%	1.8%
Other	12,130	18.3%	NA
Total	66,364	100.0%	100%

SOURCE: Visit Mississippi.

TABLE 4

Selected Casino Hotel Lodging Indicators by Region, FY 2015

Region	Casino Hotels	Number of Hotel Rooms	Occupancy Percentage	Average Daily Rate
Coastal	10	5,892	89.2	\$73.77
Northern	9	4,432	67.5	52.95
Central	7	712	64.9	67.34
Quarterly Average	26	11,036	79.0	\$65.07

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

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. Table figures reflect fiscal year quarterly averages. A large portion of the casino hotel rooms are comped. The Mississippi Gulf Coast had 6,492 casino hotel rooms as of June 30, 2016, per STR, but this is not the quarterly average.

FY 2015 figures do not include a casino hotel opened on the coast December 2015.

SOURCE: Mississippi Gaming Commission quarterly surveys.

44 GLOSSARY

Designated Market Area (DMA): Counties sharing the same primary TV broadcast signals.

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 – 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 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.

Leakage: Money leaving an area, e.g., a state, during the various rounds of expenditures.

Metropolitan Statistical Area: Have at least one urbanized area of 50,000 or more

population, plus adjacent territory with 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 and focuses 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. Its focus: 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.

Sub-sectors: More specific three-digit NAICS categories; e.g., 311 food manufacturing under 31 manufacturing; 447 gasoline service stations under 44 retail trade.

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.

Travel and tourism supply and demand: Traveler direct spending in Mississippi is the travel and tourism demand or direct travel and tourism output (supply side). Direct output includes goods and services sold directly to travelers equal to value added and intermediate inputs (including energy, raw materials, semi-finished goods and services).

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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- Real and Personal Property Hotels, Restaurants and Casinos (via selected county tax collectors and/or tax assessors, in place as of December 31, 2016)
 - Adams County. Peter Burns, Jr., Tax Collector; Reynolds Atkins, Tax Assessor.
 - Bolivar County. Nancy J. Havens, Tax Assessor and Collector; Tiffany White.
 - Clay County, Paige Lamkin, Tax Assessor and Collector.
 - Coahoma County. Hattie Shivers, Tax Assessor and Collector.
 - Covington County. Cindy A. Sanford, Tax Assessor and Collector.
 - DeSoto County. Erin Shook, Tax Collector's Office, and web site.
 - Forrest County. Delbert Dearman, Tax Collector; Terri Smith.
 - Itawamba County. Debbie Ann Johnson, Tax Collector.
 - Jones County. Lucky Holifield, Appraisal Office.
 - Lafayette County. Sylvia Baker, Tax Assessor and Collector; Katie Kaiser, Visit Oxford.
 - Lamar County. Jack Smith, Tax Assessor

- and Collector; Robin Duncan.
- Rankin County. Judy Fortenberry, Tax Collector.
- Tishomingo County. Jena P. McNatt, Tax Collector; David Wayne Crum, Tax Assessor.
- Tunica County. Norma Anderson, Tax Assessor and Collector.
- Washington County. Mark Seard, Tax Assessor.
- Yazoo County. Travis Crimm, Jr., Tax Collector.
- STR, Inc. Jennifer Foster, Director of Business Development, Destinations.
- TNS. M. Ruth Sharp, Vice-President.
- University Research Center, Mississippi Institutions of Higher Learning. Dr. Bob Neal, Senior Economist; Dr. Darrin Webb, State Economist; Corey Miller, Economic Analyst.
- Tourism capital investment:
 - Dodge Data Analytics. Matthew Holub, Economic Analyst.
 - Flowood, City of. Melissa Malone, Building and Permit Department.
 - Greenwood, City of. Penny Hodge, Code Enforcement Office.
 - Pearl, City of. Lorraine Knight, Building Permit Specialist.
 - U.S. Army Corps of Engineers

- Columbus Office. Ralph Antonelli, Park Manager, Columbus Office.
- Vicksburg Headquarters, Lawran Richter, Outdoor Recreation Planner.
- U.S. Department of the Interior, National Park Service:
 - Mississippi Final Stands Interpretive Center. Edwina Carpenter, Curator.
 - Natchez National Historical Park. Melissa Tynes, Division Chief.
 - Natchez Trace Parkway. Maggie Walker, Superintendent's Office.
 - Shiloh National Military Park/Corinth site. Ashley Berry, Supervising Ranger.
 - Vicksburg National Military Park. Shirley Smith, Human Resources Assistant.

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STEVE AZAR

MUSIC & CULTURE AMBASSADOR OF MISSISSIPPI

Steve Azar is a modern-day renaissance man, hit songwriter, recording artist, music producer, golfer and philanthropist. Steve calls his own breed of music “Delta Soul,” a mixture of country, rock and blues. His debut album “Waitin’ On Joe” was released in 2001. The title track went to No. 1 on CMT and featured academy award winning actor Morgan Freeman. From the same album, the hit single “I Don’t Have To Be Me, Til Monday” received three Million-Air awards from BMI and is one of the top five most played songs of the past decade on country radio. Turn on the radio today, and you’ll likely hear it. Taylor Swift told People Magazine in 2010 her favorite song of the year was Steve Azar’s “Sunshine.” “Slide On Over Here,” featuring the hit single “Sunshine,” was spotlighted in Oprah’s O Magazine in her “Top Things to Buy At Christmas” edition in 2011. “Sunshine” was also featured in Us Weekly in June 2012 as one of the most popular celebrity wedding songs. Steve has written and recorded songs for film and has been music supervisor for a number of movies. “Doin’ It Right” (Delta Mix) from the latest release “Delta Soul Volume One,” was the feature track for Sony Pictures 2013 movie “Here Comes the Boom” starring Kevin James and Salma Hayek. As a songwriter, Reba McEntire among many others have cut his songs. In 2007, Azar was chosen by Bob Seger to perform 46 shows on what was rated the No. 1 tour in America by Pollstar. An accomplished golfer, Steve has been ranked one of the

top five musicians who play golf by Golf Digest for the past 5 years. He is a frequent guest at charity golf tournaments across the country. In 2006, Steve and his wife Gwen started the Steve Azar St. Cecilia Foundation, and annually host the Delta Soul Celebrity Golf & Charity Event. Since its inception, the foundation has channeled more than \$400,000 to many worthwhile causes in the Delta and beyond. Steve has raised more than \$350,000 for charitable causes through the auctioning of songs. These songs are written for the highest bidder’s charity of choice.

Steve has been honored with “Steve Azar Day” in the states of Mississippi (March 13) and South Dakota (August 10). He is the co-founder of Ride Records and in 2013 co-founded the Mighty Mississippi Music Festival, dubbed “A Southern Gem” by the American Blues Scene magazine and included in Acoustic Guitar magazine’s 2014 Roadside Americana: 50 States 50 Must-Attend Events. With a strong interest in mentorship and giving back to the Delta, Steve enjoys being the artist in residence at the Delta Music Institute, part of Delta State University. Steve wrote “Fly,” the official song for the 2015 FIS Alpine World Ski Championships in Vail. His performance at the opening ceremonies reached an audience of one billion households. “Fly” also was used as the feature song for Sony Pictures movie “Paul Blart Mall Cop 2” starring actor Kevin James.

In late 2015, Steve became the spokesperson for Certified AG Business Program and his song, “American Farmer”, became the official anthem for the program. He started a weekly cooking segment on ThreadMB, an e-zine that combines mom bloggers and celebrities sharing their inspiring charitable endeavors. The blog reaches millions of readers each month and allows Steve to have fun in the kitchen while promoting the farm to fork lifestyle.

Maine Gov. Paul R. LePage has requested all governors in the United States use Steve’s latest song, “The Sky is Falling,” to spread awareness about the serious issue of human trafficking in America. In April of 2016, Steve became the first artist to

record a full-length studio album at the legendary Mississippi landmark, Club Ebony. A long time in the making, and his first record in 5 years, Steve cut 13 new original tracks. The club, now belonging to the B.B. King Museum, was turned into a recording studio capturing the rich history and vibe of the room and in turn inspiring incredible performances on the recording. The album was made with the participation of The Kings Men, a group of musicians who backed B.B. King, Elvis Presley, and other musical Kings. The combination of Steve’s Delta songwriting approach and the band’s musical background has created a unique and soulful sound. This is a true Delta Soul record. Steve & The Kings Men made their live debut headlining 2016’s B.B. King Homecoming Festival. The new record is accompanied by a full-length feature documentary combining the making of the record with the musical trajectory of The Kings Men and the historic musical influence of the Mississippi Delta on the world music scene.

Steve is an in-demand keynote speaker. His keynotes highlight the importance of giving back and that it is never too soon to start. From the sports world to the world of entertainment, Steve has had success and his share of trials and tribulations, his speeches are packed with the lessons learned. In 2007 Steve narrated “Second Crossing: The Making of The Mississippi Bridge” for Mississippi Department of Transportation. In 2016, his voice was used for a series of 12 short documentaries celebrating MDOT’s 100th anniversary.

2017 marks the bicentennial of the state of Mississippi. Steve has been appointed Music and Culture Ambassador of Mississippi and will be working closely with the state of Mississippi in his official role. This position enables him to continue making a positive impact on the state’s tourism and economy. His own Delta Soul Celebrity Golf & Charity Event and Mighty Mississippi Music Festival add millions in economic impact to the state every year. As Ambassador Steve will be able to make an even larger impact.



IN A
MISSISSIPPI MINUTE
YOU CAN TAKE YOUR
sweet time.

• "MISSISSIPPI MINUTE" BY STEVE AZAR •

