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Division of Tourism

Technical Report

Data Collection of Fiscal Year 2003 Tourism Employment and Payroll Data for Mississippi

Data collection for the Employment and Payroll components of Mississippi's Fiscal Year (FY) 2003 Tourism Economic Impact Report are presented within the context of NAICS.

Mississippi's estimated 91,500 direct tourism-related jobs in FY 2003 comprised 8.1 percent, or 1/12 of the statewide non-agricultural establishment-based employment for the 12-month period ending June 30, 2003. The 91,500 direct tourism-related jobs ranked second in the state's Service Sector behind Health Care & Social Assistance's (NAICS 62) 138,670 jobs.

Mississippi's FY 2003 tourism-related payroll was \$1.59 billion. Selected county level tourism-related employment indicators and practical/managerial implications are highlighted.

Keywords: Tourism-related jobs, Payroll, Tourism "Industry," North American Industry Classification System (NAICS), Tourism Satellite Account (TSA) applications.

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Purpose: This article highlights Mississippi tourism-related employment and payroll-related findings at the state level, including data collection methods and approaches used, in addition to selected employment data at the county level. The employment and payroll data were published in the February 2004 report titled “Fiscal Year 2003 Economic Impact for Tourism in Mississippi.” A summary of this report and the full report are available on the Mississippi Development Authority/Tourism Division’s web site: www.visitmississippi.org, more specifically on the Media page at www.visitmississippi.org; click on Statistical Reports.

Methods

MDA/Tourism Division’s Research Unit estimates the number of direct Tourism jobs and their payroll for the state fiscal year (FY) ending June 30th with the help of these organizations: Employment Security Commission’s Labor Market Information (LMI) unit, the Mississippi Band of Choctaw Indians, the Mississippi Gaming Commission, the Mississippi Department of Wildlife, Fisheries & Parks and federal entities.

Our Research Unit makes use of quarterly data from the sources with the exception of several agencies, e.g., Mississippi Department of Wildlife, Fisheries & Parks; some federal ones. In those cases, the current fiscal year’s full-time equivalent (FTE) employment-related figures, plus the payroll data, are used. State-licensed casino gaming employment and payroll data are secured through quarterly surveys conducted by the Mississippi Gaming Commission. Most other employment and payroll data come from quarterly surveys done by the Mississippi Employment Security Commission, LMI Unit.

FY 2003 was the second year where North American Industry Classification System (NAICS) employment and payroll data were secured. Some refinements were made in FY 2003 to Tourism “Factors” by selected NAICS codes, based on national, regional and statewide data. This is similar to Tourism Satellite Account (TSA) applications for countries and states.

Varied federal, state, private sector and association data were used in making the above-mentioned refinements. For example, a factor of .2—based on federal data—was used for Motion Picture Theaters in terms of employment and payroll. Information from various states helped determine factors for Gasoline Stations and Retail. Contact was made with the Mississippi Gaming Association, Mississippi Gaming Commission and the Mississippi Band of Choctaw Indians to determine the full-time equivalent (FTE) casino employment/payroll data.

From FY 1993 – FY 2001, we used the old Standard Industrial Classification (SIC) data. Our LMI Unit contact with the Mississippi Employment Security Commission provided quarterly NAICS Covered Employment and Wages totals for July-September/October-December 2002, and January-March/April-June 2003. The latter quarter data were preliminary, but our report-related deadlines and other factors precluded a longer wait. Preliminary quarterly employment data do not change much from final figures.

Findings

Mississippi reflected 91,500 estimated Tourism direct jobs in FY 2003, a 1.3 percent decrease from the 92,700 jobs for FY 2002. The 91,500 estimated jobs for FY 2003 comprised 8.1 percent, or 1/12 of the 1.13 million statewide non-agricultural establishment-based employment for this 12-month period. Moreover, the estimated FY 2003 payroll was \$1.59 billion, per Table 1, or 1.0 percent less than the FY 2002 figure. The Tourism Industry of America (TIA) estimated that Mississippi had 85,400 total tourism jobs with a \$1.53 billion payroll in calendar year (CY) 2001. These 85,400 tourism jobs were 7.6 percent of Mississippi's total non-farm employment. Our FY 2003 employment estimates were 7.1 percent higher than TIA's job totals for CY 2001, with our FY 2003 payroll estimates 4.0 percent higher, albeit for different reporting periods. TIA's CY 2001 reporting period reflected the post 9-11-01 quarter.

Mississippi's Tourism Model was developed from models including TIA's Travel Economic Impact Model (TEIM). Our model reflects seven (7) categories—Food Services and Drinking Places, Lodging, Gaming, Retail, Transportation, Recreation and Other (e.g., Employment and Payroll for Mississippi's 11 Highway Welcome Centers, local Tourism Offices and Convention & Visitor Bureaus and the State Tourism Office), as well as 36 NAICS codes for Employment and Payroll purposes. TIA's TEIM has seven (7) industry groups: Foodservice, Lodging, Entertainment & Recreation, Public Transportation, General Retail Trade, Auto Transportation and Travel Planning. These comprise sixteen (16) business subcategories.

Selected County Level Data

Mississippi's "Top Five" counties, in terms of FY 2003 Tourism Employment, were: Harrison (25,000), Tunica (14,500), Hinds (6,800), Warren (4,400) and Neshoba (4,300). The Mississippi Gulf Coast (Hancock, Harrison, and Jackson counties) had 29,445 Tourism jobs, or 32.2 percent of the statewide total. DeSoto and Tunica counties, part of Memphis's Metropolitan Statistical Area (MSA), reflected 17,265 Tourism jobs, with 14,500 in Tunica County. The Jackson Metropolitan Statistical Area (MSA)—Hinds, Madison, and Rankin counties—had 11,050 combined Tourism jobs. Hattiesburg's MSA (Forrest, Lamar and Perry counties) listed 3,200 Tourism jobs between them.

Practical/Managerial Implications

Tourism is Mississippi's second largest service sector employer behind Health Care & Social Assistance (NAICS 62). Most of the Tourism jobs are in the private sector, unlike NAICS 62, with their federal, state, county, and city facilities. Thus, Tourism is the state's largest private sector employer, across all sectors, a significant reality in a predominantly rural state with three coastal counties. Mississippi's executive and legislative branches have recognized that

Tourism is a catalyst in the state's economic development efforts. The state's legislators, state-local-private sector tourism directors/managers, among others, look forward to receiving the state and county level data presented in the most recent MDA/Tourism Division Economic Impact Report, around the time of the state's Governor's Conference on Tourism each February.

TABLE 1

**MISSISSIPPI ESTIMATED TOURISM
 EMPLOYMENT & PAYROLL FIGURES, FY 2003**

CATEGORY	FY 2003 EMPLOYMENT	FY 2003 PAYROLL
FOOD SERVICES & DRINKING PLACES	28,375	\$277,923,661
LODGING (1)	14,877	106,697,565
GAMING (2)	34,200	936,187,429
RETAIL (3)	5,430	80,730,900
SUPPORT ACTIVITIES, AIR TRANSPORTATION	1,660	62,209,335
TRAVEL ARRANGEMENT/RESERVATIONS	505	9,421,416
GASOLINE STATIONS	3,308	44,879,496
PASSENGER CAR RENTAL	168	3,251,429
AIR PASSENGER, SCHEDULED & CHARTERED	315	9,082,801
SCENIC & SIGHTSEEING TRANSPORTATION	40	706,395
CHARTER BUS INDUSTRY	111	1,568,410
TAXI SERVICE	34	749,405
SUBTOTAL, TRANSPORTATION	6,141	\$131,868,687
MOTION PICTURE THEATERS	163	1,253,325
MOTION PICTURE & VIDEO PRODUCTION	63	1,469,112
MUSEUMS, HISTORICAL SIGHTS & SIMILAR	226	4,723,290
BOWLING CENTERS	79	801,822
PERFORMING ARTS, SPECTATOR SPORTS AND RELATED INDUSTRIES	216	4,100,863
GOLF COURSES	764	11,166,692
STATE PARKS & FEDERAL RECREATION (4)	654	23,818,408

STATE, CITY, COUNTY TOURISM OFFICES (5)	237	7,702,460
MARINAS	75	1,600,181
SUBTOTAL, ATTRACTIONS/ ENTERTAINMENT/RECREATION/OTHER	2,477	\$56,636,153
TOTAL	91,500	\$1,590,044,395

1. Does not include the payroll of employees at Mississippi's 35 casino hotels.
2. Includes the payroll of all work permitted and non-work permitted employees at state – licensed casinos, plus the employees at state-licensed casino hotels and the two Pearl River Resort casinos owned and managed by the Mississippi Band of Choctaw Indians.
3. Includes Department Stores; Warehouse Clubs and Superstores; Other General Merchandise Stores; Gift, Novelty & Souvenir Shops; Antique & Secondhand Stores; Clothing and Shoe Stores; Sporting Goods Stores; and, Tobacco Stores.
4. Includes the estimated payroll of staff at the Choctaw Resort Development Enterprises.
5. Includes the estimated payroll of staff at Mississippi's 11 Highway Welcome Centers.

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Gulf Islands National Seashore

Natchez National Historical Park

Vicksburg National Military Park

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