



TTRA 41st Annual Conference

Katrina/Gulf Coast Oil Spill
Statistical Damage Control
Fiscal Year (FY) 2005 - FY 2010

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June 20, 2010



Five Key Questions

1. **What** positive networking and data sharing outcomes resulted?
2. **Why** measure Tourism Capital Investment (TCI), pre-and-post Katrina?
3. **When** do Tourism Partners & others contact the Research Manager in the time frame after natural disasters?
4. **Where** is a good "starting point" for compiling, updating and sharing data, with Tourism partners, the media, etc.?
5. **How** did Travel and Tourism fare in the six Mississippi southernmost counties, one-to-four years after Katrina? Oil Spill--???



General Background

Travel and Tourism Economic Contribution Reports

- FY 1994 – FY 2009, inclusive
- FY 2004 – 2009 reports have incorporated

“The Broader View”:

Total Value Added

Tourism Capital Investment (TCI)

Other State Level Travel and

Tourism Account data.



*Post-Katrina Initiatives
FY 2006 - 2010*

- *MDA administers about \$5.5 billion to assist Mississippi's storm recovery, from CDBG to rebuild housing, repair public infrastructure, and help the economy.*
- *Nearly \$4 billion specifically targeted to housing initiatives. About \$5 million spent on Tourism Restoration Grants by local CVB's.*
- *This cash "infusion" to the Mississippi Gulf Coast (and some other counties) helped the regional economy mount a comeback in 2007. Coast wages increased, 2006-08.*



*Post-Katrina Activity
FY 2006 - 2008*

- *Brainstormed with CVB staff, to focus on Travel and Tourism indicators—Nonfarm Employment, Visitor Expenditures, Hotel/Motel Room Inventory, etc.*
- *Prepared a quarterly summary of Selected Variables for the Mississippi Gulf Coast, 4-to-5 months (and beyond) after Katrina.*
- *Partnered with the Mississippi Gulf Coast Hotel & Lodging Association & Gulfport-Biloxi International Airport to share and update data; present realistic figures to the media.*



*Post-Katrina Activity
FY 2006 - 2009*

- *Six Mississippi Gulf Coast counties, three on the coast, plus three adjacent, recovered somewhat from a Travel and Tourism perspective, in FY 2007/2008.*
- *11 state-licensed casinos were back in operation by 2009 (1 less than pre-Katrina).*
- *Travel and Tourism expenditures for the FY 2009 cycle were down by about 18 % from the FY 2005 pre-Katrina level.*
- *Direct Travel and Tourism employment in FY 2009 was 25 % less than pre-Katrina.*



Population Change, 6-County Area and Mississippi, July 2005 - 2007

<u>Population Change</u>	<u>July 2005</u>	<u>July 2006</u>
Population, 6-County Area	463,848	433,541
Population, rest of the state	2,436,608	2,465,571
Mississippi's Total Population	2,900,456	2,899,112
<u>Population Change</u>	<u>July 2006</u>	<u>July 2007</u>
Population, 6-County Area	433,541	440,629
Population, rest of the state	2,465,571	2,478,156
Mississippi's Total Population	2,899,112	2,918,785

The six (6) county Gulf Coast Region, for Katrina initiatives:
George, Hancock, Harrison, Jackson, Pearl River, and Stone.

Source: Population Division, U.S. Census Bureau,
Washington, D.C., March 2008.



Parishes/Counties with Greatest
Population Gains and Losses
July 2005 – January 2006

Greatest Losses

Parish or County

Numeric Change

Percent Change

Orleans (LA)

-278,333

-63.8

St. Bernard (LA)

-61,215

-94.8

Jefferson (LA)

-37,273

- 8.3

Harrison (MS)

-30,713

-16.5

Hancock (MS)

-11,111

-24.0

Greatest Gains

Numeric Change

Percent Change

Harris (TX)

92,824

2.5

East Baton Rouge (LA)

16,965

4.3

Fort Bend (TX)

15,410

3.4

Montgomery (TX)

11,227

3.0

Source: Brookings analysis of U.S. Census Bureau data, June 2006.



Post-Katrina Tangible/Intangible Outcomes

Networking and Data Sharing

- The Mississippi Hotel & Lodging Association now shares Smith Travel Research data, and MDA/Tourism Division reports/projections with their Partners.
- Tom E. Van Hying is on the monthly update list to receive Gulfport-Biloxi International Airport statistics.
- One Mississippi Gulf Coast CVB partnered with the University of Southern Mississippi Gulf Park Campus, to do a Spring/Summer 2009 Visitor Profile Study (published in February 2010).
- The Mississippi Gulf Coast Business Council shares and forwards reports. MDA/Tourism Research Program assists them in reviewing policy statements, reports, etc.

Goodwill from the Above

- A Post-Katrina Intangible Outcome is the current goodwill.



***Post-April 20, 2010 Gulf Coast
Oil Spill Requests/Follow-up***

- **Office of Travel and Tourism Industries (OTTI), U.S. Commerce Department, requested county level data for the three Mississippi coastal counties.**
- ***Mississippi Gulf Coast CVB went further: detailed earnings (labor income), indirect/induced Travel and Tourism employment data, for coastal counties.***
- ***An Alabama-based Law Firm contacted Tom re Travel/Tourism stats, for our 3 coastal counties; referred to Appendix F, page 41, our FY09 Economic Contribution Report for Travel and Tourism.***



Post Oil Spill (continued)

- *Council of Economic Advisers (CEA), Executive Office of the President, Washington, D.C., contacted Tom.*
- *CEA established an on-going pipeline. Examples of data furnished to the CEA official were Smith Travel Research daily and weekly Mississippi Gulf Coast updates, starting: April 25 – May 1, 2010.*
- *The volume of Mississippi Gulf Coast Travel and Tourism data requests...increased.*
- *Best to furnish “concrete data”, instead of speculative research information. This worked post-Katrina, and post-Oil Spill.*



Post Oil Spill (continued)

- *British Petroleum (BP) gave Mississippi \$15 million (promotional \$). The Mississippi Development Authority administers it.*
- *Alabama/Louisiana received \$15 million each from BP for Tourism ads; Florida--\$25 million.*
- *Mississippi's \$15 million: \$4 million campaign including TV spots (late May '10 through June), followed by \$11 million Phase 2.*
- *On-going updates with Selected Variables for the Mississippi Gulf Coast: gross gaming revenues, enplanements, lodging data....*



Mississippi Gulf Coast: Some FY 2009 Data

- *23,600 direct Travel and Tourism jobs, and 10,140 indirect/induced jobs.*
- *33,740 estimated total jobs associated with Travel and Tourism.*
- *The 23,600 jobs = 30.2 % of the statewide 78,240 direct Travel and Tourism jobs.*
- *The 33,740 jobs = 30.7 % of the 110,000 statewide jobs associated with Tourism.*
- *Estimated Mississippi Gulf Coast direct labor income (earnings) = \$585.3 million, 36 % of the \$1.63 billion statewide figure.*
- *\$301.5 million: indirect/induced labor income.*



FY 2010 TCI SURVEY FORM

- City/County: _____ Public/Private: _____
- Date Permit Issued [7/1/2009 - 6/30/2010]: _____
- Name/Type of Business and Site Address: _____
- New or Expansion/Renovation: _____
- Valuation and Permit Fee(\$): _____

Travel and Tourism related businesses/sites include:

- Airports
- Art Galleries
- Bed & Breakfast Inns
- Cabins
- Depots/Historic Buildings
- Hotels and Motels
- Infrastructure
- Movie Theaters
- Museums
- Parking Garages
- Rails-to-Trails
- Restaurants
- Retail/Shopping Centers
- Visitor Centers
- Welcome Centers
- Water Parks
- Zoos



TCI and Other Indicators, FY 2005 and FY 2006

Indicators	FY 2005	FY 2006
Statewide TCI	\$513.3M	\$551.2M
Mississippi Gulf Coast TCI	\$222M	\$230M
Jackson MSA TCI	\$61M	\$59M
Hattiesburg MSA TCI	\$27.3M	\$41M
State Travel/Tourism Employment	91,700	75,200
Coast Travel/Tourism Employment	32,177	15,447
State Travel/Tourism Expenditures	\$6.35B	\$5.2B
Coast Travel/Tourism Expenditures	\$2.04B	\$1.06B
Total State Hotel/Motel Rooms	55,079	46,326
Coast Hotel/Motel Rooms	16,422	7,269



TCI and Other Indicators, FY 2007 and FY 2008

<u>Indicators</u>	<u>FY 2007</u>	<u>FY 2008</u>
Statewide TCI	\$895.6M	\$687.6M
Mississippi Gulf Coast TCI	\$560M	\$374M
Jackson MSA TCI	\$99M	\$95.7M
Hattiesburg MSA TCI	\$61.3M	\$12.6M
State Travel/Tourism Employment	85,300	85,000
Coast Travel/Tourism Employment	26,167	26,540
State Travel/Tourism Expenditures	\$5.7B	\$6.0B
Coast Travel/Tourism Expenditures	\$1.62B	\$1.8B
Total State Hotel/Motel Rooms	51,087	53,719
Coast Hotel/Motel Rooms	11,227	12,801



TCI and Other Indicators, FY 2009 and FY 2010 (projected)

Indicators	FY 2009	FY 2010 (proj.)
Statewide TCI	\$278.7M	\$225M-\$250M
Mississippi Gulf Coast TCI	\$143.6M	NA
Jackson MSA TCI	\$29.3M	NA
Hattiesburg MSA TCI	\$10.4M	NA
State Travel/Tourism Employment	78,240	74,340-76,040
Coast Travel/Tourism Employment	23,600	22,500
State Travel/Tourism Expenditures	\$5.6B	\$5.1B - \$5.3B
Coast Travel/Tourism Expenditures	\$1.64B	\$1.55B
Total State Hotel/Motel Rooms	56,222	58,000
Coast Hotel/Motel Rooms	13,389	13,788

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