The Economic Impact Of Travel On North Carolina Counties 2011

A Study Prepared for the
North Carolina Division of Tourism, Film and Sports Development
by the
U.S. Travel Association
Washington, D.C.
August 2012

PREFACE

This study was conducted by the Research Department of the U.S. Travel Association for the **North Carolina Division of Tourism, Film and Sports Development**. The study provides preliminary 2011 and 2010 estimates of domestic and international travelers' expenditures in North Carolina, as well as the employment, payroll income, and federal, state and local tax revenue directly generated by these expenditures.

Additionally, this study provides 2011 and 2010 estimates of domestic traveler expenditures and employment, payroll income, and state and local tax revenue directly generated by these expenditures for each of 100 counties in North Carolina.

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INTRODUCTION

This report presents preliminary 2011 estimates of the impact of the U.S. resident and international traveler expenditures in North Carolina, as well as the employment, payroll income and tax revenue directly generated by these expenditures. For the purpose of comparison, 2010 impact data are also included in this report.

All estimates of the economic impact of travel contained in this volume are the product of the U.S. Travel Association's Travel Economic Impact Model (TEIM), a proprietary economic model developed expressly to indicate the expenditures, employment, payroll, and tax revenue generated by travel away from home in the United States.

The Travel Economic Impact Model (TEIM) was initially developed for the U.S. Department of the Interior to indicate the economic value of travel and tourism to states and counties. The original TEIM has been revised substantially based on more accurate and targeted input data available from governments and the private sector.

The domestic component of TEIM is based on national surveys conducted by the U.S. Travel Association and other travel-related data developed by the U.S. Travel Association, various federal agencies and national travel organizations each year. A summary of the methodology is provided in Appendix A.

The international traveler expenditure estimates are based on the Office of Travel and Tourism Industries' (OTTI) In-Flight Survey and data provided to OTTI from Canada and Mexico. Other estimates of the economic impact of international visitors to the U.S. are generated by the TEIM by incorporating the estimated international travelers' expenditures with the data series utilized to produce the domestic estimates.

U.S. residents traveling in North Carolina includes both state residents and out-of-state visitors traveling away from home overnight in paid accommodations, or on day or overnight trips to places 50 miles or more away from home. Travel commuting to and from work; travel by those operating an airplane, bus, truck, train or other form of common carrier transportation; military travel on active duty; and travel by students away at school are all excluded from the model. In addition, the payroll and employment estimates represent impact generated in the private sector and exclude public-supported payroll and employment.

Since additional data relating to travel and its economic impact in 2011 will become available subsequent to this study, the U.S. Travel Association reserves the right to revise these estimates in the future.

EXECUTIVE SUMMARY

- Domestic and international travelers directly spent $19.0 billion in North Carolina during 2011, up 8.1 percent from 2010.
- Domestic and international travelers' expenditures directly generated 196,100 jobs in 2011, up 2.4 percent from 2010. These jobs composed 5.0 percent of total state non-agricultural employment in 2011.
- Domestic and international travelers' expenditures generated nearly $4.4 billion in payroll income for North Carolina during 2011. This represented an increase of 4.9 percent from 2010.
- On average, every $97,100 spent by domestic and international travelers in North Carolina during 2011 generated one job.
- Domestic and international travelers' expenditures in North Carolina directly generated more than $2.9 billion in tax revenue for federal, state and local governments in 2011, up 3.6 percent from 2010.
- In 2011, Mecklenburg County received more than $4.1 billion in domestic travelers' expenditures to lead all of North Carolina's 100 counties. Wake County ranked second with $1.7 billion, followed by Guilford County with close to $1.1 billion.
- Thirty seven of North Carolina's 100 counties received over $100 million in domestic travelers' expenditures in 2011.
- Thirty three counties in North Carolina indicated one thousand or more jobs directly supported by domestic travelers during 2011.

TRAVEL IMPACT ON THE U.S. ECONOMY IN 2011

In 2011, the U.S. economy had a year of slow growth and fears of a double-dip recession. Real GDP grew at an annual rate of 1.8 percent in 2011, compared to 2.4 percent in 2010. The deceleration in GDP growth in 2011 was due to slowdowns in export growth and inventory accumulation along with a decline in government spending, which together more than offset accelerations in consumer spending and business fixed investment. Real disposable personal income increased 1.3 percent, slower than the 1.8 percent growth in 2010. In 2011, the nation's employment situation improved for the first time in four years: total non-farm employment increased 1.1 percent and total private industry employment grew a faster 1.7 percent. As a result, the unemployment rate decreased from 9.6 percent in 2010 to 8.9 percent in 2011.

With respect to inflation, the U.S. Consumer Price Index (CPI) rose 3.2 percent in 2011, whereas inflation in the travel industry, measured by the U.S. Travel Association's Travel Price Index (TPI), increased by 6.5 percent in 2011. Travel inflation outpaced overall consumer prices in 2011 primarily due to the sizable increases in motor fuel (26.5%) and airfare (9.3%) prices. Meanwhile, the core CPI (excluding food and energy prices) rose 1.7 percent in 2011, which was a modest increase from the 1 percent rise in 2010. The energy index increased 15.4 percent in 2011 after a 9.5 percent increase in 2010.

The real GDP increased at an annual rate of 2.0 percent in the first quarter of 2012, roughly half the 4.1 percent pace reached in the last quarter in 2011; in the second quarter, economic growth continued to moderate, with real GDP edging up 1.5 percent. The real GDP is forecasted to grow 2.4 percent in 2012 and a mild growth is expected to continue in next few years.

Positive employment growth remains constant, but sluggish. Through the first seven months of 2012, the economy added 151,000 jobs on average per-month, which is slightly less than the 2011 monthly average of 153,000 jobs created. As a consequence of moderate employment growth, the unemployment rate, though lower than at any time since January 2009, hovered around 8.3 percent through the first seven months of 2012. Through June 2012, year to date CPI increased 2.3 percent compared to the first six months of 2011, and is forecasted to increase by 2.6 percent for 2012 overall compared to 2011. The TPI is forecasted to increase 2.9 percent in 2012.

U.S. Travel Volume in 2011

After growing 3.3 percent in 2010, U.S. domestic travel volume measured in person-trips, increased 1.7 percent in 2011 to 2.0 billion person-trips in the year. A person-trip is defined as one person on a trip away from home overnight in paid accommodations, or on a day or overnight trip to places 50 miles or more, one-way, away from home. Domestic person-trips are expected to increase 1.9 percent in 2012.

In 2011, the growth of domestic travel volume slowed down for both business travelers and leisure travelers. Domestic business person-trips increased 1.0 percent to 456.1 million person-trips for 2011, while domestic leisure travel grew by 1.9 percent to 1.5 billion person-trips. In line with the economic recovery, the U.S. Travel Association forecasts that domestic business person-trips will be up 2.2 percent and leisure travel will increase 1.8 percent in 2012.

International inbound travelers to the U.S., including visitors from overseas, Canada, and Mexico, made 62.3 million visits to the U.S. in 2011, up 4.2 percent from 2010. Total international arrivals to the U.S. are expected to increase 5.0 percent to 65.4 million in 2012. Overseas arrivals to the U.S. increased 5.8 percent in 2011. During the year, arrivals from Canada increased 5.3, while Mexican visits decreased 0.4 percent.

Travel Expenditures in 2011

Domestic and international travelers' spending in the U.S. increased 8.8 percent in 2011 to $812.9 billion, not adjusted for inflation. Business travelers spent $248.8 billion while leisure travelers spent $564.1 billion. Measured in chained 2005 dollars, real domestic and international travelers' expenditures increased 3.0 percent in 2011.

Domestic travelers spent $696.7 billion directly in 2011, up 8.2 percent from 2010, before any inflation adjustment. Domestic direct travel expenditures are forecasted to increase 4.8 percent to $730.2 billion in 2012. Real spending by domestic travelers was up 2.8 percent in 2011 adjusted in chained 2005 dollars.

International travelers spent $116.3 billion in the U.S. during 2011, up 12.3 percent from 2010. In addition, international travelers paid a total of $36.6 billion to U.S. air carriers on international passenger fares in 2011, up 18.2 percent from 2010. In total, U.S. travel exports including international travelers spending in the U.S. and international passenger fares totaled $152.7 billion in 2011, accounted for 7.3 percent of U.S. total exports of goods and services. Furthermore, the U.S. travel and tourism industry generated a $43 billion trade surplus in 2011, $11.3 billion more than 2010.

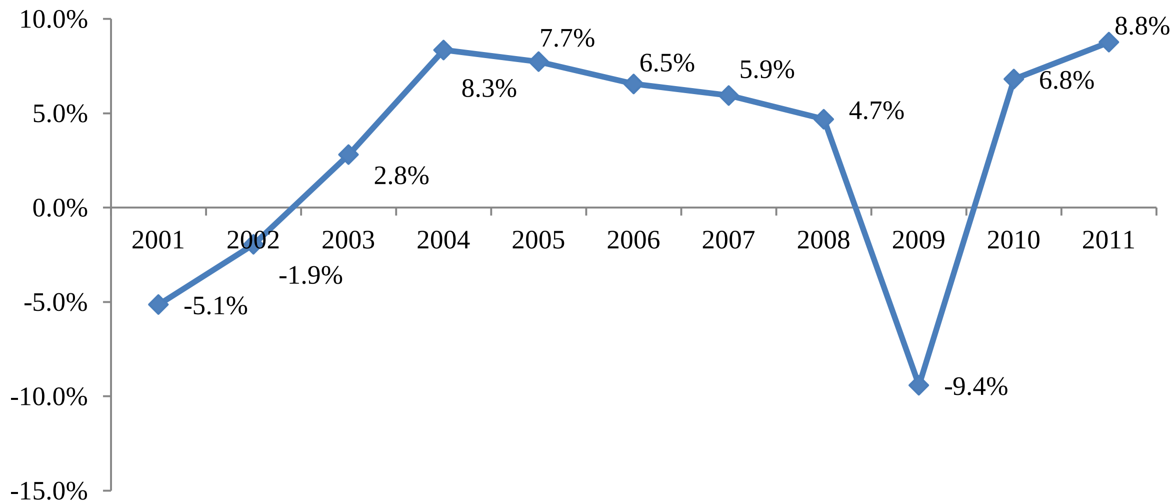
Without these travel exports, the 2011 trade deficit on goods and services would be 27.3 percent larger than its current level. International travelers' expenditure (excluding passenger fares) in the U.S. is expected to continue to increase by 7.4 percent to $124.9 billion in 2012.

Table 1: Travel Expenditures in the U.S., 2010 and 2011

Industry Sector	2010 Travel Spending ($ Billions)	2011p Travel Spending ($ Billions)	% 2011p/2010 Travel Spending (Percent Change)
Domestic Travel			
Public Transportation	$130.4	$142.7	9.4%
Auto Transportation	123.7	145.8	17.9%
Lodging	108.2	116.1	7.3%
Foodservice	159.0	167.5	5.4%
Entertainment/Recreation	74.0	75.6	2.2%
General Retail	48.7	49.1	0.7%
Domestic Total	$643.9	$696.7	8.2%
International Total*	$103.5	$116.3	12.3%
Grand Total	**$747.4**	**$812.9**	**8.8%**

*Source: U.S. Travel Association. P: preliminary. * Excludes international passenger fare payments.*

Changes of Direct Travel Expenditures* in the U.S., 2001-2011p



*Source: U.S. Travel Association. P: preliminary. * Excludes international passenger fare payments.*

Travel Employment in 2011

After two years of declines, travel-generated employment in the U.S. increased 1.9 percent to 7.5 million in 2011. This outpaces growth in both total non-farm employment (1.1%) and total private employment (1.7%) in 2011. The travel-generated jobs accounted for 5.7 percent of total nonfarm employment and 6.9 percent of total private employment in 2011. The job growth in the travel industry accounted for seven percent of the total jobs added in 2011. During the year, the number of jobs in the travel industry was double the number of jobs in construction and real estate industries combined.

International traveler spending supported nearly 1.1 million jobs during 2011, up 5.3 percent from 2010. More than one third of added jobs in travel industry were generated by international traveler spending during 2011.

Table 2: Travel-Generated Employment in the U.S., 2010 and 2011

Industry Sector	2010 Travel-Generated Employment (Thousands)	2011p Travel-Generated Employment (Thousands)	% 2011p/2010 Travel-Generated Employment (Percent Change)
Domestic Travel			
Public Transportation	881.9	884.2	0.3%
Auto Transportation	247.2	249.0	0.7%
Lodging	1,164.6	1,188.4	2.0%
Foodservice	2,534.1	2,579.6	1.8%
Entertainment/Recreation	1,048.8	1,060.6	1.1%
General Retail	316.7	315.3	-0.4%
Travel Planning	156.9	160.7	2.5%
Domestic Total	6,350.2	6,437.9	1.4%
International Total*	1,020.7	1,074.5	5.3%
Grand Total	**7,370.9**	**7,512.4**	**1.9%**

Sources: U.S. Travel Association, BLS
** Excludes jobs generated by international passenger fare payments.*

Table 3: Overall U.S. Economic Developments, 2009-2011

Sector	2009	2010	2011
Nominal gross domestic product ($ Billions)	$13,973.7	$14,498.9	$15,075.7
Real gross domestic product ($ Billions)*	$12,757.9	$13,063.0	$13,299.1
Real disposable personal income ($Billions)*	$9,836.7	$10,016.5	$10,149.7
Real personal consumption expenditures ($ Billions)*	$9,032.6	$9,196.2	$9,428.8
Consumer price index**	214.5	218.1	224.9
Travel Price Index**	241.5	250.7	266.9
Non-farm payroll employment (Millions)	130.8	129.9	131.4
Unemployment rate (%)	9.3	9.6	8.9
Percentage change from previous year			
Nominal gross domestic product	-2.2%	3.8%	4.0%
Real gross domestic product	-3.1%	2.4%	1.8%
Real disposable personal income	-2.8%	1.8%	1.3%
Real personal consumption expenditures	-1.9%	1.8%	2.5%
Consumer price index	-0.4%	1.6%	3.2%
Travel Price Index	-6.3%	3.8%	6.5%
Non-farm payroll employment	-4.4%	-0.7%	1.1%

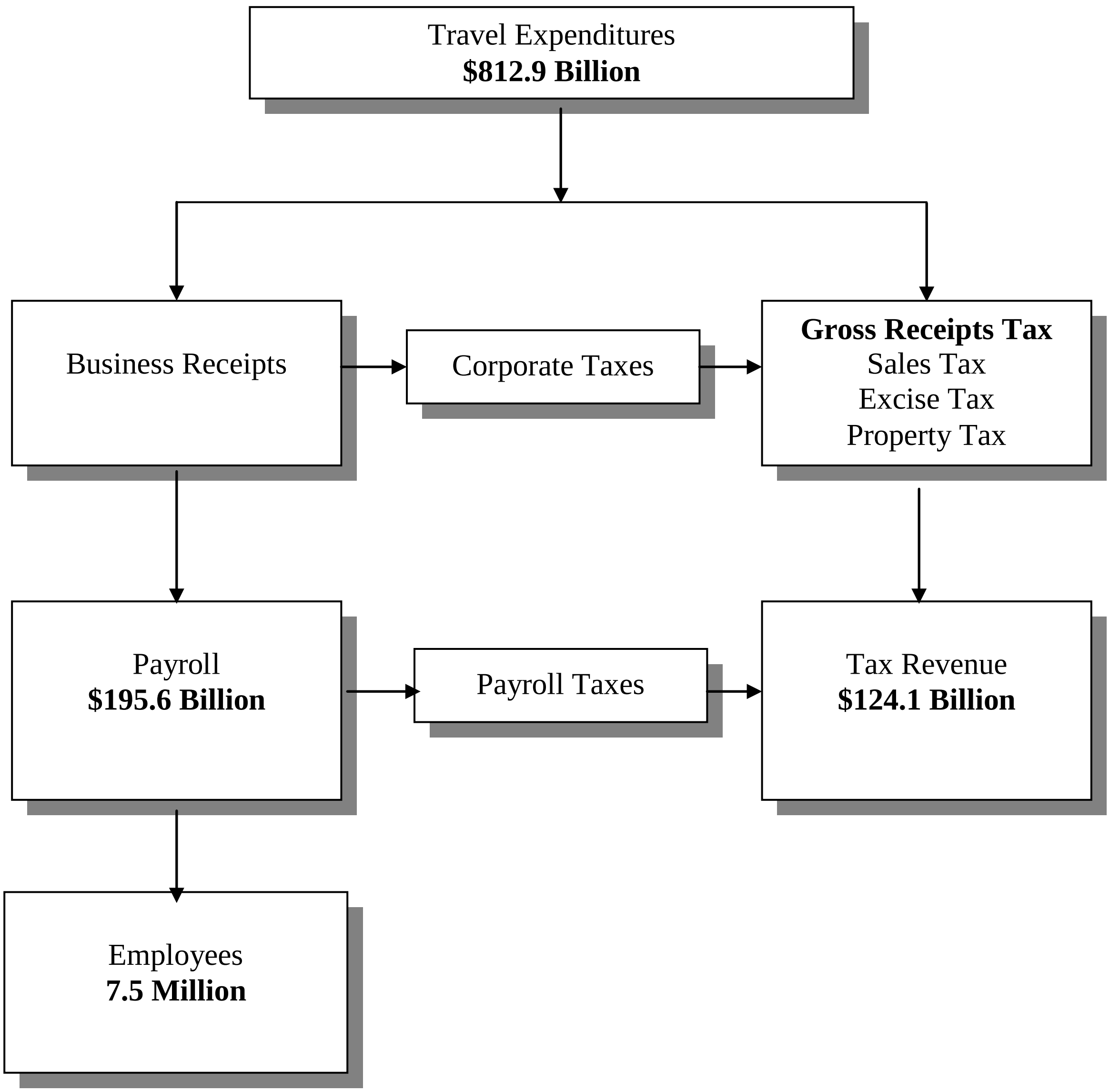
Sources: U.S. Dept. of Commerce, U.S. Dept. of Labor, U.S. Census Bureau, U.S. Travel Association
** Chained 2005 dollars*
*** 1982-84=100*

Table 4: U.S. Travel Trends, 2007-2011

Category	2007	2008	2009	2010	2011
Total travel expenditures ($ billions)	$738.0	$772.5	$699.8	$747.4	$812.9
U.S. travelers' expenditures ($ billions)	$640.6	$662.1	$605.6	$643.9	$696.7
International travelers' expenditures In the U.S. ($ billions)*	$97.4	$110.4	$94.2	$103.5	$116.3
Travel price index**	244.0	257.7	241.5	250.7	266.9
Travel-generated employment*** (thousands)	7,699.9	7,723.1	7,397.2	7,370.9	7,512.4
Percentage change from previous year					
Total travel expenditures	5.9%	4.7%	-9.4%	6.8%	8.8%
U.S. travelers' expenditures	4.9%	3.4%	-8.5%	6.3%	8.2%
International travelers' expenditures in the U.S.	13.0%	13.4%	-14.7%	9.9%	12.3%
Travel price index	4.5%	5.6%	-6.3%	3.8%	6.5%
Travel-generated employment	2.1%	0.3%	-4.2%	-0.4%	1.9%

Sources: U.S. Travel Association, BEA and BLS.
** International traveler spending does not include international passenger fares.*
*** 1982-84=100.*
**** Includes employment generated by both domestic and international traveler expenditures.*

Direct Travel Impact on the United States in 2011



Source: U.S. Travel Association, BEA
**Does not include international passenger fare payments and other economic impact generated by these payments.*

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TRAVEL IMPACT ON NORTH CAROLINA

TRAVEL IMPACT ON NORTH CAROLINA - 2011

Travel Expenditures

- Domestic and international travelers in North Carolina directly spent $19.0 billion during 2011 on transportation, lodging, food, entertainment and recreation, and retail trade, representing an 8.1 percent increase from 2010. Domestic traveler expenditures reached $18.4 billion in 2011, up 8.3 percent from 2010, while total direct international traveler expenditures increased to $618.4 million, up 4.7 percent from 2010.

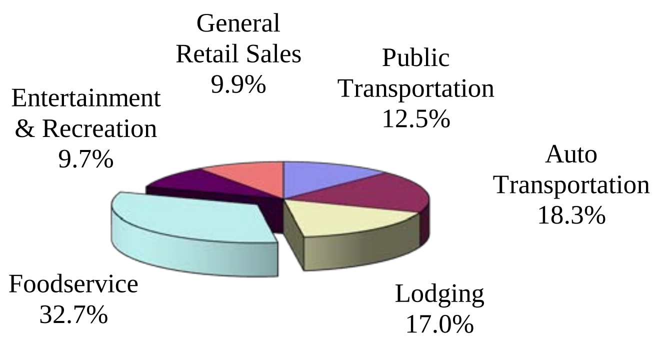
- In 2011, foodservice, the largest domestic traveler spending sector in North Carolina, reached $6.0 billion and accounted for nearly one third (32.7%) of the state total domestic travelers' expenditures, up 5.7 percent from 2010.

- Domestic traveler expenditures on auto transportation ranked second with nearly $3.4 billion, 18.3 percent of the state total, up 15.7 percent from 2010. This high growth partially reflects dramatically increased motor fuel prices during 2011.

- Domestic travelers spent $3.1 billion on lodging, up 6.3 percent from 2010. Smith Travel Research data show that room sold and average daily room rate increased 4.9 percent and 2.6 percent, respectively.

- Domestic travelers' spending on public transportation reached $2.3 billion, up 12.4 percent from 2010.

Domestic Travelers' Expenditures in North Carolina by Industry Sector, 2011



1. Auto transportation sector includes privately-owned vehicles that are used for trips (e.g., automobiles, trucks, campers or other recreational vehicles), gasoline service stations, and automotive rental.
2. Foodservice sector includes restaurants, grocery stores and other eating and drinking establishments.
3. Public transportation sector comprises air, intercity bus, rail, boat or ship, and taxicab or limousine service.
4. Lodging sector consists of hotels and motels, campgrounds, and ownership or rental of vacation or second homes.
5. General retail trade sector includes gifts, clothes, souvenirs and other incidental retail purchases.
6. Entertainment and recreation sector includes amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Table 5: Direct Domestic Travel Expenditures in North Carolina by Industry Sector

2011 Expenditures	Total ($ Millions)	% of Domestic Total
Public Transportation	$2,302.6	12.5%
Auto Transportation	3,370.4	18.3%
Lodging	3,125.9	17.0%
Foodservice	6,021.6	32.7%
Entertainment & Recreation	1,784.6	9.7%
General Retail Sales	1,815.9	9.9%
Domestic Total	18,421.1	100.0%
International Total	618.4	
Grand Total	$19,039.5	
2010 Expenditures		
Public Transportation	$2,049.2	12.0%
Auto Transportation	2,913.1	17.1%
Lodging	2,941.7	17.3%
Foodservice	5,696.1	33.5%
Entertainment & Recreation	1,676.3	9.9%
General Retail Sales	1,739.3	10.2%
Domestic Total	17,015.7	100.0%
International Total	590.7	
Grand Total	$17,606.4	
Percentage Change 2011 over 2010		
Public Transportation	12.4%	
Auto Transportation	15.7%	
Lodging	6.3%	
Foodservice	5.7%	
Entertainment & Recreation	6.5%	
General Retail Sales	4.4%	
Domestic Total	8.3%	
International Total	4.7%	
Grand Total	8.1%	

Source: U.S. Travel Association

TRAVEL IMPACT ON NORTH CAROLINA - 2011

Travel-Generated Payroll

Travel-generated payroll is the wage and salary income paid to employees directly serving the traveler within the industry sectors from which these travelers purchase goods and services. Each dollar spent on travel generates different amounts of payroll income within the various travel industry sectors depending on the labor content and the wage structure of each sector.

- Payroll (wages and salaries) paid by North Carolina travel-related firms and directly attributable to direct domestic and international traveler spending totaled nearly $4.4 billion in 2011, up 4.9 percent from 2010.

- In 2011, total direct domestic traveler expenditures generated nearly $4.2 billion payroll income in North Carolina, a 4.9 percent increase from 2010, while total direct international traveler expenditures generated $170.9 million in payroll income, up 3.2 percent over 2010.

- On average in 2011, every dollar spent by domestic and international travelers in North Carolina produced 23 cents in wage and salary income.

- The foodservice sector, the largest payroll income sector among seven payroll sectors reported in this report, posted nearly $1.3 billion in payroll income generated by domestic travel in 2011.

Domestic Travelers' Expenditures Generated Payroll in North Carolina by Industry Sector, 2011

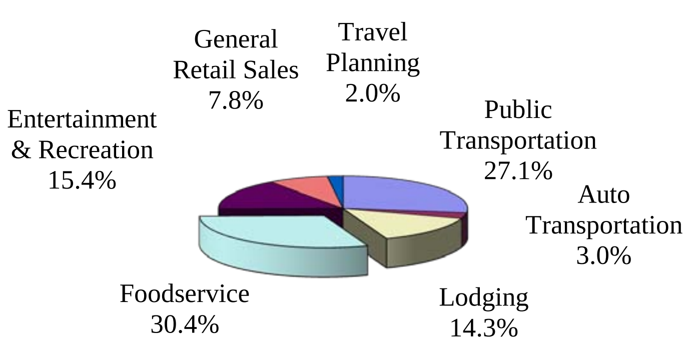


Table 6: Direct Domestic Travel-Generated Payroll in North Carolina by Industry Sector

2011 Payroll	Total ($ Millions)	% of Total
Public Transportation	$1,137.0	27.1%
Auto Transportation	123.7	3.0%
Lodging	598.0	14.3%
Foodservice	1,273.8	30.4%
Entertainment & Recreation	646.2	15.4%
General Retail Sales	328.6	7.8%
Travel Planning*	85.1	2.0%
Domestic Total	4,192.5	100.0%
International Total	170.9	
Grand Total	$4,363.3	
2010 Payroll		
Public Transportation	$1,026.9	25.7%
Auto Transportation	125.1	3.1%
Lodging	571.2	14.3%
Foodservice	1,254.1	31.4%
Entertainment & Recreation	619.4	15.5%
General Retail Sales	319.5	8.0%
Travel Planning*	79.6	2.0%
Domestic Total	3,995.8	100.0%
International Total	165.6	
Grand Total	$4,161.4	
Percentage Change 2011 over 2010		
Public Transportation	10.7%	
Auto Transportation	-1.1%	
Lodging	4.7%	
Foodservice	1.6%	
Entertainment & Recreation	4.3%	
General Retail Sales	2.9%	
Travel Planning*	6.8%	
Domestic Total	4.9%	
International Total	3.2%	
Grand Total	4.9%	

Source: U.S. Travel Association

** Refers to payroll income that goes to travel agents, tour operators, and other travel service employees who arrange passenger transportation, lodging, tours and other related services.*

TRAVEL IMPACT ON NORTH CAROLINA - 2011

Travel-Generated Employment

The most impressive contribution that travel and tourism makes to the North Carolina economy is the number of businesses and jobs it supports. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations.

- During 2011, direct domestic and international traveler spending in North Carolina generated 196,100 jobs, including full-time and seasonal/part-time positions in the state, up just 2.4 percent from 2010.
- On average, every $97,100 spent by domestic and international travelers in North Carolina directly supported one job in 2011.
- During 2011, direct domestic traveler expenditures generated 188,400 jobs, a 2.5 percent increase from 2010, while international traveler expenditures directly generated 7,700 jobs, up 1.6 percent from 2010.
- It is important to note that these travel-related jobs composed 5.0 percent of total non-agricultural employment in North Carolina during 2011. Without these jobs, North Carolina's 2011 unemployment rate of 10.5 percent would have been 4.2 percentage points higher, or the equivalent of 14.7 percent of the labor force.
- The foodservice sector, which includes restaurants and other eating and drinking places, provided more jobs than any other industry sector. During 2011, domestic traveler spending in this sector supported 82,900 jobs, accounting for 44.0 percent of the state total. The labor-intensiveness of these businesses and the large proportion of travel expenditures spent on food service contribute to the importance of this sector.

Domestic Travelers' Expenditures Generated Employment in North Carolina by Industry Sector, 2011

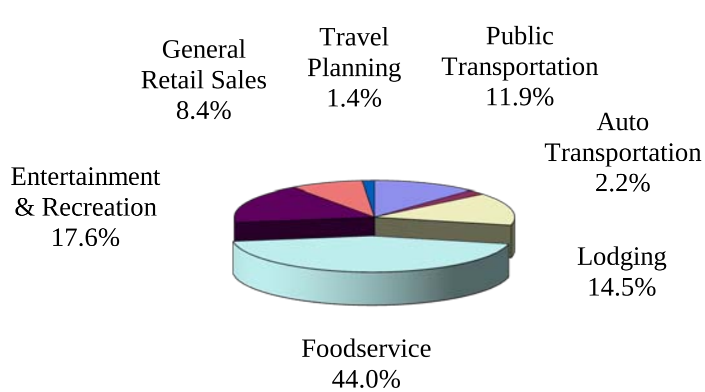


Table 7: Direct Domestic Travel-Generated Employment in North Carolina by Industry Sector

2011 Employment	Total (thousands)	% of Total
Public Transportation	22.4	11.9%
Auto Transportation	4.1	2.2%
Lodging	27.4	14.5%
Foodservice	82.9	44.0%
Entertainment & Recreation	33.2	17.6%
General Retail Sales	15.8	8.4%
Travel Planning*	2.6	1.4%
Domestic Total	188.4	100.0%
International Total	7.7	
Grand Total	196.1	
2010 Employment		
Public Transportation	21.1	11.4%
Auto Transportation	4.1	2.2%
Lodging	26.8	14.6%
Foodservice	81.2	44.2%
Entertainment & Recreation	32.7	17.8%
General Retail Sales	15.5	8.4%
Travel Planning*	2.5	1.4%
Domestic Total	183.9	100.0%
International Total	7.5	
Grand Total	191.4	
Percentage Change 2011 over 2010		
Public Transportation	6.5%	
Auto Transportation	-0.8%	
Lodging	2.2%	
Foodservice	2.0%	
Entertainment & Recreation	1.7%	
General Retail Sales	2.0%	
Travel Planning*	5.1%	
Domestic Total	2.5%	
International Total	1.6%	
Grand Total	2.4%	

Source: U.S. Travel Association

*Note: * Refers to jobs created in travel arrangement firms such as travel agencies, wholesale and retail tour companies, and other travel-related service businesses.*

TRAVEL IMPACT ON NORTH CAROLINA - 2011

Travel-Generated Tax Revenue

Travel tax receipts are the federal, state and local tax revenues attributable to travel spending in North Carolina. Travel-generated tax revenue is a significant economic benefit, as governments use these funds to support the travel infrastructure and help support a variety of public programs.

- In 2011, total tax revenue, including federal, state and local taxes, generated by domestic and international traveler spending in North Carolina was $2.9 billion, up 3.6 percent from 2010. Domestic traveler expenditures generated $2.8 billion, up 3.6 percent from 2010, while international traveler expenditures generated $100.6 million, a 2.3 percent increase from 2010.

- Domestic traveler spending in North Carolina generated $1.3 billion for the federal government in 2011, up 5.5 percent from 2010. This represents 46.2 percent of all domestic travel-generated tax collections in the state. Each dollar spent by domestic travelers in North Carolina produced 7.1 cents for federal tax coffers.

- Spending by domestic travelers in North Carolina generated $959.6 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 34.0 percent of all domestic travel-generated tax revenue collected in the state for 2011. On average, each travel dollar produced 5.2 cents in state tax receipts.

- During 2011, domestic traveler spending in North Carolina generated $560.9 million in sales and property tax revenue for localities, up 3.2 percent from 2010. This represents 19.9 percent of total domestic travel-generated tax revenue in the state. Each domestic travel dollar produced 3.0 cents for local tax coffers.

Domestic Travelers' Expenditures Generated Tax Revenue in North Carolina by Level of Government, 2011

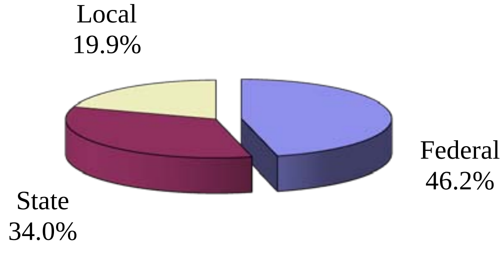


Table 8: Direct Domestic Travel-Generated Tax Revenue in North Carolina by Level of Government

2011 Tax Revenue	Total ($ Millions)	% of Total
Federal	$1,303.6	46.2%
State	959.6	34.0%
Local	560.9	19.9%
Domestic Total	2,824.2	100.0%
International Total	100.6	
Grand Total	$2,924.7	
2010 Tax Revenue		
Federal	$1,235.4	45.3%
State	946.1	34.7%
Local	543.8	20.0%
Domestic Total	2,725.2	100.0%
International Total	98.3	
Grand Total	$2,823.5	
Percentage Change 2011 over 2010		
Federal	5.5%	
State	1.4%	
Local	3.2%	
Domestic Total	3.6%	
International Total	2.3%	
Grand Total	3.6%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA COUNTIES-2011

During 2011, domestic travelers spent $18.4 billion while traveling in North Carolina, up 8.3 percent from 2010. These expenditures directly generated $4.2 billion in payroll income and 188,400 jobs. The federal government received $1.3 billion in tax revenue through the domestic travel industry in North Carolina in 2011. Additionally, domestic traveler expenditures generated almost $960 million in tax revenue for the state treasury and nearly $561 million tax revenue for local governments during 2011.

Travel expenditures occurred throughout all the one hundred counties in North Carolina. The top five counties in North Carolina received $8.6 billion in direct domestic travel expenditures during 2011, 46.5 percent of the state total. Direct domestic traveler spending in the top five counties generated $2.5 billion in payroll income and supported 94,600 jobs in 2011.

DOMESTIC TRAVEL IMPACT IN TOP 5 COUNTIES

Mecklenburg County, including the city of Charlotte**,** led all counties in domestic traveler expenditures, payroll income, jobs, and state and local taxes directly generated by domestic traveler spending in 2011. Domestic traveler spending in Mecklenburg County was more than $4.1 billion, accounting for 22.3 percent of the state total. These expenditures generated nearly $1.4 billion in payroll income and supported 43,300 jobs for county economy in 2011.

Wake County ranked second with nearly $1.7 billion in domestic traveler spending in 2011, representing 9.2 percent of the state total. The payroll income and jobs directly attributable to domestic traveler spending reached $521 million and 19,200 jobs.

Guilford County posted $1.1 billion in domestic traveler expenditures to rank third. These expenditures generated nearly $262 million in payroll income as well as 11,800 jobs within the county in 2011.

Dare County received $877 million from domestic travelers in 2011. These domestic traveler expenditures benefited county with $176 million in payroll income and 11,300 jobs.

Buncombe County ranked fifth with $783 million in direct domestic traveler expenditures during 2011. These receipts from domestic travelers generated $165 million in payroll income and 9,100 jobs.

Table 9: Domestic Travel Impact in North Carolina - Top 5 Counties

2011 Travel Impact County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
MECKLENBURG	$4,116.7	$1,355.0	43.3	$198.9	$103.2
WAKE	1,698.9	521.0	19.2	83.5	46.3
GUILFORD	1,093.1	261.6	11.8	57.6	25.1
DARE	877.2	175.7	11.3	44.3	40.5
BUNCOMBE	783.0	165.2	9.1	41.3	24.2
FIVE COUNTY TOTAL	$8,568.9	$2,478.5	94.6	$425.6	$239.2
STATE TOTALS	$18,421.1	$4,192.5	188.4	$959.6	$560.9
FIVE COUNTY SHARE	46.5%	59.1%	50.2%	44.4%	42.7%
2010 Travel Impact					
MECKLENBURG	$3,727.0	$1,276.2	41.5	$192.2	$99.6
WAKE	1,541.0	490.8	18.4	80.8	44.1
GUILFORD	1,006.9	247.5	11.4	56.6	24.4
DARE	834.3	172.0	11.3	44.6	39.8
BUNCOMBE	729.0	159.1	8.9	40.8	23.4
FIVE COUNTY TOTAL	$7,838.2	$2,345.7	91.6	$415.0	$231.3
STATE TOTALS	$17,015.7	$3,995.8	183.9	$946.1	$543.8
FIVE COUNTY SHARE	46.1%	58.7%	49.8%	43.9%	42.5%
Percent Change 2011 over 2010					
MECKLENBURG	10.5%	6.2%	4.2%	3.5%	3.5%
WAKE	10.2%	6.2%	4.1%	3.4%	4.9%
GUILFORD	8.6%	5.7%	3.1%	1.7%	2.9%
DARE	5.1%	2.2%	0.1%	-0.6%	1.9%
BUNCOMBE	7.4%	3.8%	1.5%	1.2%	3.5%
FIVE COUNTY TOTAL	9.3%	5.7%	3.3%	2.6%	3.4%
STATE TOTALS	8.3%	4.9%	2.5%	1.4%	3.2%

Source: U.S. Travel Association

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the U.S. Travel Association's Travel Economic Impact Model for North Carolina in 2011 and 2010. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A	shows the counties listed alphabetically, with 2011 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.
Table B	ranks the counties in order of 2011 travel expenditures from highest to lowest.
Table C	shows the percent distribution for each impact measure in 2011.
Table D	shows the percent change in 2011 over 2010 estimates for each of the measures of economic impact.
Table E	shows the counties listed alphabetically, with 2010 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

2011 Impact of Travel on North Carolina
Table A: Alphabetical by County, 2011

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
ALAMANCE	$150.27	$23.20	1.26	$8.70	$2.64
ALEXANDER	17.03	2.43	0.11	0.93	0.71
ALLEGHANY	21.62	3.76	0.18	1.07	1.45
ANSON	15.60	1.84	0.10	0.89	0.39
ASHE	45.34	6.46	0.37	2.37	2.47
AVERY	98.38	21.77	1.16	5.17	4.38
BEAUFORT	70.36	8.85	0.44	3.59	4.21
BERTIE	12.51	1.21	0.05	0.68	0.70
BLADEN	34.25	3.51	0.18	1.98	0.96
BRUNSWICK	418.03	75.83	4.67	20.40	26.32
BUNCOMBE	783.01	165.20	9.07	41.32	24.18
BURKE	78.50	11.02	0.62	4.31	2.28
CABARRUS	340.08	72.93	3.79	20.10	5.59
CALDWELL	44.83	6.52	0.32	2.43	1.38
CAMDEN	1.82	0.19	0.01	0.10	0.15
CARTERET	278.74	48.77	2.96	13.20	17.38
CASWELL	7.39	0.74	0.04	0.36	0.53
CATAWBA	215.67	38.10	2.09	11.81	6.52
CHATHAM	27.73	3.22	0.16	1.62	0.50
CHEROKEE	33.92	5.00	0.29	1.67	2.05
CHOWAN	17.18	2.46	0.14	0.85	1.08
CLAY	11.65	1.24	0.06	0.50	1.29
CLEVELAND	88.20	12.31	0.63	5.13	1.53
COLUMBUS	46.13	5.40	0.28	2.61	1.26
CRAVEN	116.29	21.39	1.04	6.37	2.56
CUMBERLAND	450.11	80.97	4.20	24.52	9.44
CURRITUCK	121.34	22.01	1.38	5.48	5.78

2010 Impact of Travel on North Carolina
Table A: Alphabetical by County, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
DARE	877.18	175.74	11.26	44.28	40.54
DAVIDSON	131.74	17.99	0.91	7.28	4.27
DAVIE	30.45	5.30	0.27	1.70	0.53
DUPLIN	34.65	3.84	0.19	2.00	1.14
DURHAM	590.54	118.63	7.20	32.62	17.27
EDGECOMBE	51.84	6.89	0.35	2.86	0.87
FORSYTH	688.12	114.02	6.01	40.02	12.75
FRANKLIN	20.43	2.30	0.12	1.14	0.51
GASTON	205.03	31.42	1.70	11.73	3.39
GATES	5.77	0.48	0.02	0.34	0.21
GRAHAM	23.73	4.01	0.25	1.16	1.57
GRANVILLE	40.89	4.90	0.28	2.32	1.12
GREENE	5.19	0.49	0.03	0.29	0.18
GUILFORD	1,093.05	261.58	11.79	57.55	25.08
HALIFAX	78.54	9.10	0.49	4.71	1.68
HARNETT	68.56	9.45	0.54	3.81	1.56
HAYWOOD	120.40	22.76	1.28	6.40	4.95
HENDERSON	209.39	36.38	1.93	9.79	9.31
HERTFORD	25.00	3.08	0.17	1.45	0.63
HOKE	10.04	1.20	0.07	0.56	0.16
HYDE	31.69	5.91	0.38	1.57	1.72
IREDELL	194.41	29.18	1.61	10.83	6.02
JACKSON	66.79	10.68	0.57	3.15	5.27
JOHNSTON	191.12	28.25	1.61	10.73	4.87
JONES	3.72	0.49	0.02	0.22	0.11
LEE	63.87	10.89	0.59	3.67	1.30
LENOIR	78.36	12.62	0.63	4.37	1.51

2011 Impact of Travel on North Carolina
Table A: Alphabetical by County, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
LINCOLN	45.42	7.10	0.35	2.51	1.34
MACON	126.15	21.40	1.10	5.96	10.28
MADISON	30.60	5.75	0.30	1.62	1.41
MARTIN	27.72	4.00	0.22	1.52	0.69
MCDOWELL	47.52	6.88	0.39	2.51	1.73
MECKLENBURG	4,116.75	1,355.03	43.26	198.91	103.17
MITCHELL	20.48	3.01	0.16	0.92	0.89
MONTGOMERY	23.62	2.31	0.10	1.12	2.20
MOORE	374.21	81.30	4.88	20.04	11.52
NASH	245.85	46.19	2.81	13.26	6.59
NEW HANOVER	425.84	94.44	5.10	21.65	17.53
NORTHAMPTON	12.97	1.45	0.05	0.58	1.09
ONSLOW	195.36	34.91	1.67	10.32	7.40
ORANGE	156.82	28.72	1.65	8.60	3.04
PAMLICO	15.04	1.72	0.08	0.64	1.67
PASQUOTANK	53.19	7.89	0.47	2.98	1.20
PENDER	76.39	12.76	0.72	3.72	5.30
PERQUIMANS	9.03	1.06	0.04	0.39	1.03
PERSON	31.54	3.77	0.21	1.81	0.69
PITT	194.66	37.07	1.95	10.30	4.36
POLK	21.75	3.01	0.17	1.13	1.22
RANDOLPH	115.43	17.05	0.89	6.88	1.86
RICHMOND	40.85	7.04	0.39	2.21	0.78
ROBESON	123.05	17.82	1.06	7.07	2.46
ROCKINGHAM	60.05	9.58	0.52	3.23	1.45
ROWAN	130.62	20.67	1.18	7.07	4.32
RUTHERFORD	141.73	19.44	1.12	8.32	4.18

2011 Impact of Travel on North Carolina
Table A: Alphabetical by County, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
SAMPSON	43.91	5.49	0.28	2.43	1.39
SCOTLAND	38.00	6.03	0.35	2.11	0.67
STANLY	67.45	8.59	0.46	3.85	2.02
STOKES	21.27	2.63	0.13	1.09	0.83
SURRY	102.52	14.39	0.76	5.72	2.19
SWAIN	280.50	76.90	3.28	17.17	6.06
TRANSYLVANIA	77.32	13.55	0.71	3.14	3.58
TYRRELL	3.31	0.31	0.01	0.15	0.32
UNION	101.27	15.30	0.85	5.70	1.84
VANCE	41.76	5.45	0.28	2.41	1.22
WAKE	1,698.87	520.98	19.18	83.54	46.27
WARREN	23.64	2.78	0.12	0.89	2.05
WASHINGTON	13.68	1.73	0.09	0.75	0.58
WATAUGA	197.56	42.17	2.40	10.35	7.81
WAYNE	138.58	17.85	0.97	8.37	2.09
WILKES	62.33	8.85	0.49	3.11	1.54
WILSON	97.59	14.10	0.78	5.68	1.84
YADKIN	31.31	5.20	0.32	1.71	0.77
YANCEY	31.04	4.87	0.23	1.45	2.23
STATE TOTALS	**$18,421.06**	**$4,192.47**	**188.42**	**$959.61**	**$560.93**

2011 Impact of Travel on North Carolina
Table B: Ranking of Counties by Expenditure Levels, 2011

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
MECKLENBURG	$4,116.75	$1,355.03	43.26	$198.91	$103.17
WAKE	1,698.87	520.98	19.18	83.54	46.27
GUILFORD	1,093.05	261.58	11.79	57.55	25.08
DARE	877.18	175.74	11.26	44.28	40.54
BUNCOMBE	783.01	165.20	9.07	41.32	24.18
FORSYTH	688.12	114.02	6.01	40.02	12.75
DURHAM	590.54	118.63	7.20	32.62	17.27
CUMBERLAND	450.11	80.97	4.20	24.52	9.44
NEW HANOVER	425.84	94.44	5.10	21.65	17.53
BRUNSWICK	418.03	75.83	4.67	20.40	26.32
MOORE	374.21	81.30	4.88	20.04	11.52
CABARRUS	340.08	72.93	3.79	20.10	5.59
SWAIN	280.50	76.90	3.28	17.17	6.06
CARTERET	278.74	48.77	2.96	13.20	17.38
NASH	245.85	46.19	2.81	13.26	6.59
CATAWBA	215.67	38.10	2.09	11.81	6.52
HENDERSON	209.39	36.38	1.93	9.79	9.31
GASTON	205.03	31.42	1.70	11.73	3.39
WATAUGA	197.56	42.17	2.40	10.35	7.81
ONSLOW	195.36	34.91	1.67	10.32	7.40
PITT	194.66	37.07	1.95	10.30	4.36
IREDELL	194.41	29.18	1.61	10.83	6.02
JOHNSTON	191.12	28.25	1.61	10.73	4.87
ORANGE	156.82	28.72	1.65	8.60	3.04
ALAMANCE	150.27	23.20	1.26	8.70	2.64
RUTHERFORD	141.73	19.44	1.12	8.32	4.18
WAYNE	138.58	17.85	0.97	8.37	2.09

2011 Impact of Travel on North Carolina
Table B: Ranking of Counties by Expenditure Levels, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
DAVIDSON	131.74	17.99	0.91	7.28	4.27
ROWAN	130.62	20.67	1.18	7.07	4.32
MACON	126.15	21.40	1.10	5.96	10.28
ROBESON	123.05	17.82	1.06	7.07	2.46
CURRITUCK	121.34	22.01	1.38	5.48	5.78
HAYWOOD	120.40	22.76	1.28	6.40	4.95
CRAVEN	116.29	21.39	1.04	6.37	2.56
RANDOLPH	115.43	17.05	0.89	6.88	1.86
SURRY	102.52	14.39	0.76	5.72	2.19
UNION	101.27	15.30	0.85	5.70	1.84
AVERY	98.38	21.77	1.16	5.17	4.38
WILSON	97.59	14.10	0.78	5.68	1.84
CLEVELAND	88.20	12.31	0.63	5.13	1.53
HALIFAX	78.54	9.10	0.49	4.71	1.68
BURKE	78.50	11.02	0.62	4.31	2.28
LENOIR	78.36	12.62	0.63	4.37	1.51
TRANSYLVANIA	77.32	13.55	0.71	3.14	3.58
PENDER	76.39	12.76	0.72	3.72	5.30
BEAUFORT	70.36	8.85	0.44	3.59	4.21
HARNETT	68.56	9.45	0.54	3.81	1.56
STANLY	67.45	8.59	0.46	3.85	2.02
JACKSON	66.79	10.68	0.57	3.15	5.27
LEE	63.87	10.89	0.59	3.67	1.30
WILKES	62.33	8.85	0.49	3.11	1.54
ROCKINGHAM	60.05	9.58	0.52	3.23	1.45
PASQUOTANK	53.19	7.89	0.47	2.98	1.20
EDGECOMBE	51.84	6.89	0.35	2.86	0.87

2011 Impact of Travel on North Carolina
Table B: Ranking of Counties by Expenditure Levels, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
MCDOWELL	47.52	6.88	0.39	2.51	1.73
COLUMBUS	46.13	5.40	0.28	2.61	1.26
LINCOLN	45.42	7.10	0.35	2.51	1.34
ASHE	45.34	6.46	0.37	2.37	2.47
CALDWELL	44.83	6.52	0.32	2.43	1.38
SAMPSON	43.91	5.49	0.28	2.43	1.39
VANCE	41.76	5.45	0.28	2.41	1.22
GRANVILLE	40.89	4.90	0.28	2.32	1.12
RICHMOND	40.85	7.04	0.39	2.21	0.78
SCOTLAND	38.00	6.03	0.35	2.11	0.67
DUPLIN	34.65	3.84	0.19	2.00	1.14
BLADEN	34.25	3.51	0.18	1.98	0.96
CHEROKEE	33.92	5.00	0.29	1.67	2.05
HYDE	31.69	5.91	0.38	1.57	1.72
PERSON	31.54	3.77	0.21	1.81	0.69
YADKIN	31.31	5.20	0.32	1.71	0.77
YANCEY	31.04	4.87	0.23	1.45	2.23
MADISON	30.60	5.75	0.30	1.62	1.41
DAVIE	30.45	5.30	0.27	1.70	0.53
CHATHAM	27.73	3.22	0.16	1.62	0.50
MARTIN	27.72	4.00	0.22	1.52	0.69
HERTFORD	25.00	3.08	0.17	1.45	0.63
GRAHAM	23.73	4.01	0.25	1.16	1.57
WARREN	23.64	2.78	0.12	0.89	2.05
MONTGOMERY	23.62	2.31	0.10	1.12	2.20
POLK	21.75	3.01	0.17	1.13	1.22
ALLEGHANY	21.62	3.76	0.18	1.07	1.45

2011 Impact of Travel on North Carolina
Table B: Ranking of Counties by Expenditure Levels, 2011 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
STOKES	21.27	2.63	0.13	1.09	0.83
MITCHELL	20.48	3.01	0.16	0.92	0.89
FRANKLIN	20.43	2.30	0.12	1.14	0.51
CHOWAN	17.18	2.46	0.14	0.85	1.08
ALEXANDER	17.03	2.43	0.11	0.93	0.71
ANSON	15.60	1.84	0.10	0.89	0.39
PAMLICO	15.04	1.72	0.08	0.64	1.67
WASHINGTON	13.68	1.73	0.09	0.75	0.58
NORTHAMPTON	12.97	1.45	0.05	0.58	1.09
BERTIE	12.51	1.21	0.05	0.68	0.70
CLAY	11.65	1.24	0.06	0.50	1.29
HOKE	10.04	1.20	0.07	0.56	0.16
PERQUIMANS	9.03	1.06	0.04	0.39	1.03
CASWELL	7.39	0.74	0.04	0.36	0.53
GATES	5.77	0.48	0.02	0.34	0.21
GREENE	5.19	0.49	0.03	0.29	0.18
JONES	3.72	0.49	0.02	0.22	0.11
TYRRELL	3.31	0.31	0.01	0.15	0.32
CAMDEN	1.82	0.19	0.01	0.10	0.15
STATE TOTALS	**$18,421.06**	**$4,192.47**	**188.42**	**$959.61**	**$560.93**

2011 Impact of Travel on North Carolina
Table C: Percent Distribution by County, 2011

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ALAMANCE	0.82%	0.55%	0.67%	0.91%	0.47%
ALEXANDER	0.09%	0.06%	0.06%	0.10%	0.13%
ALLEGHANY	0.12%	0.09%	0.10%	0.11%	0.26%
ANSON	0.08%	0.04%	0.05%	0.09%	0.07%
ASHE	0.25%	0.15%	0.20%	0.25%	0.44%
AVERY	0.53%	0.52%	0.61%	0.54%	0.78%
BEAUFORT	0.38%	0.21%	0.23%	0.37%	0.75%
BERTIE	0.07%	0.03%	0.03%	0.07%	0.12%
BLADEN	0.19%	0.08%	0.10%	0.21%	0.17%
BRUNSWICK	2.27%	1.81%	2.48%	2.13%	4.69%
BUNCOMBE	4.25%	3.94%	4.82%	4.31%	4.31%
BURKE	0.43%	0.26%	0.33%	0.45%	0.41%
CABARRUS	1.85%	1.74%	2.01%	2.10%	1.00%
CALDWELL	0.24%	0.16%	0.17%	0.25%	0.25%
CAMDEN	0.01%	0.00%	0.00%	0.01%	0.03%
CARTERET	1.51%	1.16%	1.57%	1.38%	3.10%
CASWELL	0.04%	0.02%	0.02%	0.04%	0.09%
CATAWBA	1.17%	0.91%	1.11%	1.23%	1.16%
CHATHAM	0.15%	0.08%	0.09%	0.17%	0.09%
CHEROKEE	0.18%	0.12%	0.15%	0.17%	0.37%
CHOWAN	0.09%	0.06%	0.07%	0.09%	0.19%
CLAY	0.06%	0.03%	0.03%	0.05%	0.23%
CLEVELAND	0.48%	0.29%	0.34%	0.53%	0.27%
COLUMBUS	0.25%	0.13%	0.15%	0.27%	0.22%
CRAVEN	0.63%	0.51%	0.55%	0.66%	0.46%
CUMBERLAND	2.44%	1.93%	2.23%	2.56%	1.68%
CURRITUCK	0.66%	0.52%	0.73%	0.57%	1.03%

2011 Impact of Travel on North Carolina
Table C: Percent Distribution by County, 2011 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
DARE	4.76%	4.19%	5.98%	4.61%	7.23%
DAVIDSON	0.72%	0.43%	0.48%	0.76%	0.76%
DAVIE	0.17%	0.13%	0.14%	0.18%	0.10%
DUPLIN	0.19%	0.09%	0.10%	0.21%	0.20%
DURHAM	3.21%	2.83%	3.82%	3.40%	3.08%
EDGECOMBE	0.28%	0.16%	0.19%	0.30%	0.16%
FORSYTH	3.74%	2.72%	3.19%	4.17%	2.27%
FRANKLIN	0.11%	0.05%	0.06%	0.12%	0.09%
GASTON	1.11%	0.75%	0.90%	1.22%	0.60%
GATES	0.03%	0.01%	0.01%	0.04%	0.04%
GRAHAM	0.13%	0.10%	0.13%	0.12%	0.28%
GRANVILLE	0.22%	0.12%	0.15%	0.24%	0.20%
GREENE	0.03%	0.01%	0.01%	0.03%	0.03%
GUILFORD	5.93%	6.24%	6.26%	6.00%	4.47%
HALIFAX	0.43%	0.22%	0.26%	0.49%	0.30%
HARNETT	0.37%	0.23%	0.29%	0.40%	0.28%
HAYWOOD	0.65%	0.54%	0.68%	0.67%	0.88%
HENDERSON	1.14%	0.87%	1.02%	1.02%	1.66%
HERTFORD	0.14%	0.07%	0.09%	0.15%	0.11%
HOKE	0.05%	0.03%	0.04%	0.06%	0.03%
HYDE	0.17%	0.14%	0.20%	0.16%	0.31%
IREDELL	1.06%	0.70%	0.85%	1.13%	1.07%
JACKSON	0.36%	0.25%	0.30%	0.33%	0.94%
JOHNSTON	1.04%	0.67%	0.86%	1.12%	0.87%
JONES	0.02%	0.01%	0.01%	0.02%	0.02%
LEE	0.35%	0.26%	0.31%	0.38%	0.23%
LENOIR	0.43%	0.30%	0.33%	0.45%	0.27%

2011 Impact of Travel on North Carolina
Table C: Percent Distribution by County, 2011 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
LINCOLN	0.25%	0.17%	0.19%	0.26%	0.24%
MACON	0.68%	0.51%	0.59%	0.62%	1.83%
MADISON	0.17%	0.14%	0.16%	0.17%	0.25%
MARTIN	0.15%	0.10%	0.12%	0.16%	0.12%
MCDOWELL	0.26%	0.16%	0.21%	0.26%	0.31%
MECKLENBURG	22.35%	32.32%	22.96%	20.73%	18.39%
MITCHELL	0.11%	0.07%	0.09%	0.10%	0.16%
MONTGOMERY	0.13%	0.06%	0.05%	0.12%	0.39%
MOORE	2.03%	1.94%	2.59%	2.09%	2.05%
NASH	1.33%	1.10%	1.49%	1.38%	1.17%
NEW HANOVER	2.31%	2.25%	2.71%	2.26%	3.12%
NORTHAMPTON	0.07%	0.03%	0.03%	0.06%	0.19%
ONSLOW	1.06%	0.83%	0.89%	1.08%	1.32%
ORANGE	0.85%	0.68%	0.87%	0.90%	0.54%
PAMLICO	0.08%	0.04%	0.04%	0.07%	0.30%
PASQUOTANK	0.29%	0.19%	0.25%	0.31%	0.21%
PENDER	0.41%	0.30%	0.38%	0.39%	0.95%
PERQUIMANS	0.05%	0.03%	0.02%	0.04%	0.18%
PERSON	0.17%	0.09%	0.11%	0.19%	0.12%
PITT	1.06%	0.88%	1.04%	1.07%	0.78%
POLK	0.12%	0.07%	0.09%	0.12%	0.22%
RANDOLPH	0.63%	0.41%	0.47%	0.72%	0.33%
RICHMOND	0.22%	0.17%	0.21%	0.23%	0.14%
ROBESON	0.67%	0.43%	0.56%	0.74%	0.44%
ROCKINGHAM	0.33%	0.23%	0.27%	0.34%	0.26%
ROWAN	0.71%	0.49%	0.62%	0.74%	0.77%
RUTHERFORD	0.77%	0.46%	0.59%	0.87%	0.75%

2011 Impact of Travel on North Carolina
Table C: Percent Distribution by County, 2011 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
SAMPSON	0.24%	0.13%	0.15%	0.25%	0.25%
SCOTLAND	0.21%	0.14%	0.19%	0.22%	0.12%
STANLY	0.37%	0.20%	0.25%	0.40%	0.36%
STOKES	0.12%	0.06%	0.07%	0.11%	0.15%
SURRY	0.56%	0.34%	0.40%	0.60%	0.39%
SWAIN	1.52%	1.83%	1.74%	1.79%	1.08%
TRANSYLVANIA	0.42%	0.32%	0.37%	0.33%	0.64%
TYRRELL	0.02%	0.01%	0.01%	0.02%	0.06%
UNION	0.55%	0.36%	0.45%	0.59%	0.33%
VANCE	0.23%	0.13%	0.15%	0.25%	0.22%
WAKE	9.22%	12.43%	10.18%	8.71%	8.25%
WARREN	0.13%	0.07%	0.06%	0.09%	0.37%
WASHINGTON	0.07%	0.04%	0.05%	0.08%	0.10%
WATAUGA	1.07%	1.01%	1.27%	1.08%	1.39%
WAYNE	0.75%	0.43%	0.52%	0.87%	0.37%
WILKES	0.34%	0.21%	0.26%	0.32%	0.27%
WILSON	0.53%	0.34%	0.41%	0.59%	0.33%
YADKIN	0.17%	0.12%	0.17%	0.18%	0.14%
YANCEY	0.17%	0.12%	0.12%	0.15%	0.40%
STATE TOTALS	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

2011 Impact of Travel on North Carolina
Table D: Percent Change From 2010

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ALAMANCE	10.27%	4.94%	4.11%	1.67%	4.68%
ALEXANDER	9.27%	6.24%	4.02%	1.04%	3.20%
ALLEGHANY	4.36%	1.58%	-0.89%	-1.75%	0.51%
ANSON	10.28%	6.26%	3.40%	1.40%	4.25%
ASHE	5.46%	3.30%	-0.20%	-1.40%	0.18%
AVERY	9.53%	4.76%	1.78%	3.22%	6.20%
BEAUFORT	5.07%	2.71%	0.83%	-1.53%	-0.67%
BERTIE	9.08%	3.64%	2.49%	0.57%	1.69%
BLADEN	9.29%	4.01%	1.33%	0.42%	-0.12%
BRUNSWICK	5.73%	2.98%	1.52%	-0.17%	2.38%
BUNCOMBE	7.41%	3.83%	1.53%	1.21%	3.49%
BURKE	9.19%	5.12%	3.70%	1.18%	2.73%
CABARRUS	8.68%	5.81%	2.78%	2.31%	7.97%
CALDWELL	5.62%	2.88%	0.69%	-1.27%	-2.04%
CAMDEN	6.86%	3.14%	0.95%	-0.87%	-2.48%
CARTERET	2.74%	0.24%	-1.14%	-2.97%	-0.81%
CASWELL	7.79%	4.92%	2.37%	0.63%	3.12%
CATAWBA	7.56%	3.10%	1.84%	0.26%	1.00%
CHATHAM	10.81%	6.42%	4.04%	2.02%	4.56%
CHEROKEE	7.19%	2.53%	0.97%	0.38%	2.97%
CHOWAN	4.41%	1.18%	-0.45%	-2.01%	-1.00%
CLAY	3.82%	1.34%	-0.82%	-2.48%	-0.42%
CLEVELAND	9.61%	5.30%	2.78%	1.48%	3.39%
COLUMBUS	8.62%	3.48%	2.47%	0.44%	1.40%
CRAVEN	7.39%	4.28%	0.97%	0.51%	1.37%
CUMBERLAND	7.77%	3.92%	1.70%	0.73%	2.54%
CURRITUCK	3.61%	0.78%	-0.30%	-2.16%	0.21%

2011 Impact of Travel on North Carolina
Table D: Percent Change From 2010 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
DARE	5.14%	2.18%	0.07%	-0.62%	1.92%
DAVIDSON	10.78%	6.81%	3.00%	2.21%	4.70%
DAVIE	6.92%	3.66%	1.55%	-0.03%	0.81%
DUPLIN	7.02%	3.41%	0.58%	-0.49%	12.47%
DURHAM	8.06%	5.18%	2.63%	1.57%	3.75%
EDGECOMBE	5.68%	2.87%	0.37%	-1.24%	-1.27%
FORSYTH	10.47%	6.11%	3.41%	2.01%	3.87%
FRANKLIN	8.06%	5.19%	2.63%	0.65%	2.60%
GASTON	7.52%	4.51%	2.20%	0.28%	1.20%
GATES	9.41%	6.01%	2.61%	0.63%	0.95%
GRAHAM	3.99%	1.16%	-0.74%	-1.97%	0.05%
GRANVILLE	9.51%	4.83%	4.01%	0.89%	1.59%
GREENE	7.64%	3.68%	1.56%	-0.12%	0.92%
GUILFORD	8.56%	5.67%	3.10%	1.69%	2.88%
HALIFAX	8.84%	2.59%	1.70%	0.27%	0.39%
HARNETT	8.21%	4.22%	3.54%	0.87%	3.00%
HAYWOOD	3.51%	0.73%	-1.20%	-2.36%	-0.98%
HENDERSON	3.10%	0.17%	-1.84%	-2.86%	-1.87%
HERTFORD	7.41%	3.14%	1.53%	-0.47%	4.37%
HOKE	6.90%	4.06%	1.53%	-0.25%	1.04%
HYDE	2.55%	-0.18%	-2.61%	-3.11%	-0.85%
IREDELL	7.43%	2.67%	0.96%	0.14%	1.73%
JACKSON	6.72%	3.59%	1.44%	0.40%	2.94%
JOHNSTON	9.20%	6.29%	3.71%	1.66%	3.78%
JONES	8.95%	5.28%	2.92%	0.60%	0.30%
LEE	6.67%	3.05%	2.01%	-0.31%	6.14%
LENOIR	4.82%	1.16%	-1.12%	-1.71%	-1.51%

2011 Impact of Travel on North Carolina
Table D: Percent Change From 2010 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
LINCOLN	8.29%	5.41%	2.85%	0.84%	1.98%
MACON	3.34%	0.65%	-1.23%	-2.49%	-0.31%
MADISON	7.19%	3.88%	1.81%	0.70%	2.82%
MARTIN	6.53%	3.70%	1.18%	-0.36%	0.75%
MCDOWELL	7.77%	4.40%	1.78%	0.51%	2.07%
MECKLENBURG	10.46%	6.17%	4.20%	3.47%	3.54%
MITCHELL	7.21%	3.51%	1.82%	0.42%	2.73%
MONTGOMERY	6.61%	3.78%	1.26%	-0.37%	1.70%
MOORE	9.34%	5.92%	3.32%	3.21%	5.94%
NASH	5.09%	2.29%	-0.19%	-0.96%	0.66%
NEW HANOVER	6.23%	3.08%	1.16%	0.26%	11.51%
NORTHAMPTON	8.58%	4.80%	3.12%	1.33%	3.74%
ONSLOW	8.35%	3.32%	2.21%	1.12%	12.49%
ORANGE	8.85%	5.69%	2.59%	1.80%	3.96%
PAMLICO	4.66%	1.50%	-1.05%	-1.87%	-0.22%
PASQUOTANK	4.97%	1.56%	-1.06%	-1.54%	-0.36%
PENDER	4.89%	3.68%	1.04%	1.15%	1.94%
PERQUIMANS	4.29%	1.52%	-0.95%	-2.00%	0.23%
PERSON	6.84%	2.51%	0.91%	-0.80%	-1.46%
PITT	7.11%	4.26%	1.73%	0.67%	2.33%
POLK	7.35%	3.60%	2.14%	-0.01%	0.93%
RANDOLPH	6.51%	1.66%	0.63%	-0.94%	4.07%
RICHMOND	9.23%	5.60%	3.74%	2.10%	4.68%
ROBESON	5.70%	2.70%	0.15%	-1.20%	10.84%
ROCKINGHAM	5.20%	2.76%	0.62%	-1.16%	-0.03%
ROWAN	4.84%	1.18%	-0.56%	-1.71%	4.83%
RUTHERFORD	9.65%	5.47%	3.14%	1.33%	2.82%

2011 Impact of Travel on North Carolina
Table D: Percent Change From 2010 (Continued)

County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
SAMPSON	8.33%	4.84%	2.89%	0.59%	1.85%
SCOTLAND	6.69%	3.55%	1.31%	-0.12%	1.27%
STANLY	9.60%	5.48%	3.07%	1.28%	2.85%
STOKES	6.03%	3.27%	0.70%	-0.91%	-0.13%
SURRY	7.90%	4.44%	2.96%	0.60%	2.29%
SWAIN	9.42%	4.32%	2.05%	3.28%	6.14%
TRANSYLVANIA	7.76%	4.17%	1.97%	1.51%	4.32%
TYRRELL	6.33%	3.50%	0.99%	-0.83%	0.41%
UNION	9.46%	6.17%	3.39%	2.00%	4.48%
VANCE	7.81%	2.87%	1.45%	-0.20%	-0.79%
WAKE	10.25%	6.16%	4.10%	3.44%	4.90%
WARREN	9.59%	6.24%	4.09%	2.28%	5.37%
WASHINGTON	9.69%	5.29%	4.17%	1.55%	3.80%
WATAUGA	4.11%	2.54%	0.10%	-1.35%	0.55%
WAYNE	9.55%	5.20%	3.45%	1.00%	1.75%
WILKES	7.86%	5.26%	2.34%	1.21%	12.68%
WILSON	7.81%	4.14%	1.99%	0.21%	0.75%
YADKIN	6.60%	3.76%	1.24%	-0.09%	1.28%
YANCEY	3.76%	0.31%	-1.50%	-2.31%	-0.15%
STATE TOTALS	**8.26%**	**4.92%**	**2.47%**	**1.43%**	**3.15%**

2010 Impact of Travel on North Carolina
Table E: Alphabetical by County, 2010

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
ALAMANCE	$136.28	$22.11	1.21	$8.55	$2.52
ALEXANDER	15.58	2.29	0.11	0.92	0.68
ALLEGHANY	20.72	3.70	0.18	1.09	1.44
ANSON	14.15	1.73	0.10	0.88	0.37
ASHE	42.99	6.25	0.37	2.40	2.46
AVERY	89.82	20.78	1.14	5.01	4.12
BEAUFORT	66.97	8.62	0.44	3.64	4.24
BERTIE	11.47	1.16	0.05	0.67	0.68
BLADEN	31.34	3.38	0.18	1.98	0.96
BRUNSWICK	395.38	73.63	4.60	20.44	25.71
BUNCOMBE	729.02	159.11	8.94	40.82	23.37
BURKE	71.89	10.48	0.60	4.26	2.22
CABARRUS	312.92	68.92	3.68	19.65	5.18
CALDWELL	42.45	6.34	0.32	2.46	1.41
CAMDEN	1.71	0.19	0.01	0.10	0.15
CARTERET	271.30	48.65	2.99	13.60	17.52
CASWELL	6.85	0.70	0.04	0.35	0.51
CATAWBA	200.51	36.95	2.05	11.78	6.46
CHATHAM	25.03	3.03	0.16	1.59	0.48
CHEROKEE	31.64	4.88	0.28	1.66	1.99
CHOWAN	16.45	2.44	0.14	0.87	1.09
CLAY	11.23	1.22	0.06	0.51	1.30
CLEVELAND	80.47	11.69	0.61	5.06	1.48
COLUMBUS	42.47	5.22	0.27	2.60	1.24
CRAVEN	108.29	20.51	1.03	6.33	2.52
CUMBERLAND	417.67	77.91	4.13	24.35	9.21
CURRITUCK	117.12	21.84	1.38	5.60	5.77

2010 Impact of Travel on North Carolina
Table E: Alphabetical by County, 2010 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
DARE	834.29	172.00	11.26	44.55	39.78
DAVIDSON	118.92	16.84	0.88	7.13	4.08
DAVIE	28.48	5.12	0.26	1.70	0.53
DUPLIN	32.38	3.72	0.19	2.00	1.01
DURHAM	546.50	112.78	7.02	32.12	16.65
EDGECOMBE	49.05	6.70	0.35	2.89	0.89
FORSYTH	622.88	107.46	5.82	39.24	12.27
FRANKLIN	18.91	2.19	0.12	1.13	0.50
GASTON	190.69	30.06	1.66	11.70	3.35
GATES	5.28	0.45	0.02	0.34	0.21
GRAHAM	22.82	3.97	0.25	1.18	1.57
GRANVILLE	37.34	4.67	0.27	2.30	1.10
GREENE	4.82	0.48	0.03	0.29	0.17
GUILFORD	1,006.91	247.55	11.44	56.60	24.38
HALIFAX	72.16	8.87	0.48	4.70	1.67
HARNETT	63.36	9.07	0.52	3.78	1.51
HAYWOOD	116.31	22.59	1.30	6.55	5.00
HENDERSON	203.09	36.32	1.97	10.08	9.49
HERTFORD	23.27	2.98	0.17	1.46	0.61
HOKE	9.39	1.15	0.07	0.57	0.15
HYDE	30.90	5.92	0.39	1.62	1.73
IREDELL	180.96	28.42	1.59	10.81	5.92
JACKSON	62.58	10.31	0.56	3.13	5.12
JOHNSTON	175.02	26.57	1.56	10.55	4.69
JONES	3.42	0.47	0.02	0.22	0.11
LEE	59.88	10.57	0.58	3.68	1.22
LENOIR	74.76	12.48	0.64	4.44	1.53

2010 Impact of Travel on North Carolina
Table E: Alphabetical by County, 2010 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
LINCOLN	41.94	6.74	0.34	2.49	1.32
MACON	122.08	21.26	1.12	6.11	10.31
MADISON	28.54	5.53	0.30	1.61	1.37
MARTIN	26.02	3.86	0.22	1.53	0.69
MCDOWELL	44.09	6.59	0.38	2.50	1.69
MECKLENBURG	3,727.02	1,276.24	41.52	192.23	99.65
MITCHELL	19.10	2.91	0.16	0.92	0.86
MONTGOMERY	22.15	2.23	0.10	1.12	2.16
MOORE	342.25	76.75	4.73	19.41	10.87
NASH	233.95	45.15	2.82	13.38	6.55
NEW HANOVER	400.88	91.62	5.04	21.59	15.72
NORTHAMPTON	11.94	1.38	0.05	0.58	1.05
ONSLOW	180.30	33.79	1.64	10.21	6.57
ORANGE	144.07	27.17	1.61	8.45	2.92
PAMLICO	14.37	1.70	0.08	0.65	1.68
PASQUOTANK	50.67	7.76	0.47	3.02	1.20
PENDER	72.83	12.31	0.71	3.68	5.20
PERQUIMANS	8.66	1.04	0.04	0.40	1.02
PERSON	29.52	3.68	0.21	1.83	0.70
PITT	181.74	35.56	1.92	10.23	4.26
POLK	20.26	2.91	0.17	1.13	1.21
RANDOLPH	108.38	16.77	0.88	6.95	1.79
RICHMOND	37.39	6.66	0.37	2.16	0.74
ROBESON	116.42	17.36	1.05	7.15	2.22
ROCKINGHAM	57.08	9.32	0.51	3.27	1.45
ROWAN	124.59	20.43	1.18	7.19	4.12
RUTHERFORD	129.25	18.44	1.08	8.21	4.07

2010 Impact of Travel on North Carolina
Table E: Alphabetical by County, 2010 (Continued)

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
SAMPSON	40.53	5.24	0.27	2.42	1.37
SCOTLAND	35.62	5.82	0.35	2.11	0.66
STANLY	61.54	8.14	0.45	3.80	1.96
STOKES	20.06	2.55	0.13	1.10	0.83
SURRY	95.02	13.78	0.74	5.69	2.15
SWAIN	256.35	73.71	3.21	16.63	5.71
TRANSYLVANIA	71.75	13.01	0.69	3.10	3.43
TYRRELL	3.12	0.30	0.01	0.16	0.31
UNION	92.52	14.41	0.82	5.59	1.76
VANCE	38.74	5.30	0.28	2.42	1.23
WAKE	1,540.97	490.76	18.43	80.76	44.11
WARREN	21.57	2.61	0.12	0.87	1.95
WASHINGTON	12.48	1.65	0.09	0.74	0.56
WATAUGA	189.77	41.13	2.39	10.49	7.77
WAYNE	126.50	16.97	0.94	8.28	2.05
WILKES	57.79	8.40	0.48	3.07	1.36
WILSON	90.52	13.54	0.77	5.67	1.82
YADKIN	29.37	5.02	0.32	1.71	0.76
YANCEY	29.92	4.86	0.23	1.49	2.24
STATE TOTALS	**$17,015.70**	**$3,995.79**	**183.88**	**$946.05**	**$543.78**

APPENDICES

Appendix A: Travel Economic Impact Model

Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at the U.S. Travel Association (formerly known as the Travel Industry Association) to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of 18 travel categories. The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

The TEIM has the capability of estimating the economic impact of various types of travel, such as business and vacation, by transport mode and type of accommodations used, and other trip and traveler characteristics. The County Impact Component of the TEIM allows estimates of the economic impact of travel at the county and city level.

Definition of Terms

There is no commonly accepted definition of travel in use at this time. For the purposes of the estimates herein, *travel* is defined as activities associated with all overnight trips away from home in paid accommodations and day or overnight trips to places 50 miles or more, one way, from the traveler's origin.

The word *tourism* is avoided in this report because of its vague meaning. Some define tourism as all travel away from home while others use the dictionary definition that limits tourism to personal or pleasure travel.

The *travel industry*, as used herein, refers to the collection of 18 types of businesses that provide goods and services to the traveler or potential traveler at the retail level (see Glossary of Terms). With the exception of Amtrak and second home ownership and rental, these business types are defined by the Office of Management and Budget in the 1997 North American Industry Classification System (NAICS) and well as in its predecessor, the 1987 Standard Industrial Classification System (SIC). In each case, the relevant NAICS and SIC codes are included.

Travel *expenditure* is assumed to take place whenever one traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into 18 categories representing traveler purchases of goods and services at the retail level. One category, travel agents, receives no travel expenditures as these purchases are allocated to the category (i.e. air transportation) actually providing the final good or service to the traveler. Travel expenditures are allocated among states by simulating where the exchange of money for goods or service actually took place. By their nature, some travel expenditures are assumed to occur at the traveler's origin, some at his/her destination and some en route.

Economic impact is represented by measures of spending, employment, payroll, business receipts and tax revenues generated by traveler spending. *Payroll* includes all forms of compensation, such as salaries, wages, commissions, bonuses, vacation allowances, sick leave pay and the value of payments in kind paid during the year to all employees. Payroll is reported before deductions for social security, income tax insurance, union dues, etc. This definition follows that used by the U.S. Census Bureau in the quinquennial Census of Service Industries.

Employment represents the number of jobs generated by traveler spending, both full and part-time. As such, it is consistent with the U.S. Department of Labor series on nonagricultural payroll employment. *Tax revenues* include corporate income, individual income, sales and gross receipts, and excise taxes by level of government. *Business receipts* reflect travel expenditures less the sales and excise taxes imposed on those expenditures.

Description of the Model

Estimates of Travel Expenditures

Total travel expenditures includes spending by travelers on goods and services during their trips, such as lodging, transportation, meals, entertainment, retail shopping. Eighteen (18) categories of activities are covered in the TEIM. Generally, the TEIM combines the activity levels for trips to places within the United States with the appropriate average costs of each unit of travel activity, (e.g., cost per mile by mode of transport, cost per night by type of accommodation), to produce estimates of the total amount spent on each of 18 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in hotels in Vermont is multiplied by the average cost per night per travel party of staying in a hotel in the state to obtain the estimate of traveler expenditures for hotel accommodations.

The data on domestic travel activity levels (e.g., number of miles traveled by mode of transportation, the number of nights spent away from home by type of accommodation) are based on national travel surveys conducted by the U.S. Travel Association, the Bureau of Labor Statistics' Survey of Consumer Expenditures, Smith Travel Research's Hotel and Motel Survey, etc. Average cost data are purchased and collected from different organizations and government agencies. Total sales and revenue and other data collected from state, local and federal government and other organizations are employed to compare, adjust and update the spending database of TEIM, as well as linking spending to other impact components.

The international travel expenditure estimates are based on Tourism Industries' (OTTI) In-Flight Survey and data provided to OTTI from Canada and Mexico. Other estimates of the economic impact of international visitors to the U.S. are generated by TEIM by incorporating the estimated international traveler expenditures with the data series utilized to produce the domestic estimates.

Estimates of Business Receipts, Payroll and Employment

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 18 travel categories are associated with a type of travel-related business. For example, traveler spending on commercial lodging in a state is related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701; NAICS 7211) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

It is assumed that each job in a specific type of business in a state is supported by some amount of business receipts and that each dollar of wages and salaries is similarly supported by some dollar volume of business receipts. The ratios of employment to business receipts are computed for each industry in each state. These ratios are then multiplied by the total amount of business receipts generated by traveler spending in a particular type of business to obtain the measures of travel generated employment and payroll of each type of business in each state. For example, the ratio of employees to business receipts in the state commercial lodging establishments is multiplied by travel generated business receipts of these establishments to obtain traveler generated employment in commercial lodging. A similar process is used for the payroll estimates.

The total sales, payroll and employment data of each travel related industry (by SIC and NAICS) are provided by and collected from state, local and federal government, such as the Bureau of Labor Statistics, the Bureau of Economic Analysis, Census Bureau and The Bureau of Transportation Statistics.

Estimates of Tax Revenues

The Fiscal Impact Component of the TEIM is used to estimate traveler generated tax revenues of federal, state and local governments. The yield of each type of tax is related to the best measure of the relevant tax base available for each state consistent with the output of the Economic Impact Component. The ratios of yield to base for each type of tax in each state are then applied to the appropriate primary level output to obtain estimates of tax receipts generated by travel. For example, the ratio of North Carolina State personal income tax collections to payroll in the state is applied to total travel generated payroll to obtain the estimate of state personal income tax receipts attributable to traveler spending in Massachusetts.

Estimates for Counties and Local Areas

Local area travel impact estimates is derived by distributing the state estimates to the area using proper proportions of each related category in the area. The proportions of a local area are calculated based on a set of data collected from federal, state and local governments and private organizations. The data can be gathered at the zip code level.

Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and ES-202, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, U.S. Travel Association’s travel surveys and other sources are used in building and updating the model. These data indicate the change in travel spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

Limitations of the Study

This study is designed to indicate the impact of U.S. traveler expenditures on employment, payroll, business receipts and tax revenue in each of the states. These impact estimates reflect the limitations inherent in the definition of travel expenditures. Two important classes of travel-related expenses have not been estimated due to various reasons. Consumers purchase certain goods and services in anticipation of a trip away from home. These include sports equipment (tennis racquet, skis, scuba gear, etc.), travel books and guides, and services such as language lessons and lessons for participatory sports (tennis, skiing, underwater diving, etc.). The magnitude of these purchases in preparation for a trip cannot be quantified due to lack of sound, relevant data.

The second type of spending not covered due to lack of sufficient data is the purchase of major consumer durables generally related to outdoor recreation on trips. Further research is required in this area to determine to what extent pre-trip spending on consumer durable products can justifiably be included within a travel economic impact study.

Appendix B: Glossary of Terms – TEIM

Automobile Transportation Expenditure. This category includes a prorated share of the fixed costs of owning an automobile, truck, camper, or other recreational vehicle, such as insurance, license fees, tax, and depreciation costs. Also included are the variable costs of operating an automobile, truck, camper, or other recreational vehicle on a trip, such as gasoline, oil, tires, and repairs. The costs of renting an automobile or other motor vehicle are included in this category as well.

Entertainment/Recreation Expenditure. Traveler spending on recreation facility user fees, admissions at amusement parks and attractions, attendance at nightclubs, movies, legitimate shows, sports events, and other forms of entertainment and recreation while traveling.

Food Expenditure. Traveler spending in commercial eating facilities and grocery stores or carry-outs, as well as on food purchased for off-premise consumption.

Incidental Purchase Expenditure. Traveler spending on retail trade purchases including gifts for others, medicine, cosmetics, clothing, personal services, souvenirs, and other items of this nature.

Lodging Expenditure. Traveler spending on hotels and motels, B&Bs, campgrounds and trailer parks, rental of vacation homes and other types of lodging.

Public Transportation Expenditures. This includes traveler spending on air, bus, rail and boat/ship transportation, and taxicab or limousine service between airports and central cities.

Travel-generated Tax Receipts. Those federal, state and local tax revenues attributable to travel in an area. For a given state locality, all or some of the taxes may apply. "Local" includes county, city or municipality, and township units of government actually collecting the receipts and not the level that may end up receiving it through intergovernmental transfers.

Federal. These receipts include corporate income taxes, individual income taxes, employment taxes, gasoline excise taxes, and airline ticket taxes.

State. These receipts include corporate income taxes, individual income taxes, sales and gross receipts taxes, and excise taxes.

Local. These include county and city receipts from individual and corporate income taxes, sales, excise and gross receipts taxes, and property taxes.

Appendix C: Travel-Related Industry Measurement

SIC-NAICS Transition

As described in Appendix A, the 18 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, the U.S. Travel Association selected these business types using 1987 U.S. Standard Industrial Classification (SIC) system codes.

The SIC system has been used for decades with tremendous success to classify all businesses in the U.S. by the types of products or services they make available. To its credit, the SIC system has facilitated the collection, tabulation and analysis of data. It has also promoted “apples-to-apples” comparability in statistical analyses. At the industry group level, SIC Codes report industry groups as 2 or 3 digit categories to 4 digits at their most specific.

However, as a direct consequence of rapid and widespread structural changes throughout the American economy in recent years, the SIC system has become largely outdated. Therefore, its business classification capabilities have become increasingly less than optimal.

In 1998, the United States Office of Management and Budget published a new industry classification system – the 1997 North American Industry Classification System (NAICS) to replace the SIC system. In contrast, the 2- to 6-digit NAICS industry classification system includes more useful and detailed economic data and provides a more comprehensive statistical representation of our industry. NAICS offers four major advantages over the SIC system:

Relevance: NAICS identifies hundreds of new, emerging, and advanced technology industries. Perhaps most important in terms of quantification of travel-related activity, NAICS reorganizes industries into more meaningful sectors, especially in the service-producing segments of the economy. A few examples of travel-related industries that are separately recognized for the first time:

-Convenience stores
-Gas stations with convenience stores
-Casino hotels
-Casinos
-Other gambling industries
-Bed and breakfast inns
-Limited service restaurants

International Comparability: NAICS was developed by the U.S. Office of Management and Budget (OMB) in cooperation with Statistics Canada and Mexico’s Instituto Nacional de Estadística, Geografía e Informática (INEGI). NAICS provides for comparable statistics among the three NAFTA trading partners.

Consistency: NAICS defines industries according to a consistent principle -- businesses that use similar processes are grouped together.

Adaptability: NAICS will be reviewed every five years, so classifications and information keep up with our changing economy.

TEIM: SIC/NAICS Industry Categories

With the transition to NAICS, the U.S. Travel Association has adjusted its selections of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, U.S. Travel Association's Travel Economic Impact Model, tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of eighteen (18) business subcategories.

The industry groups and subcategories used in the model are outlined below, followed by a detailed table of SIC and NAICS Codes.

1. Automobile Transportation Industry: Gasoline service stations, motor vehicle/parts dealers and passenger car rental.

2. Entertainment/Recreation Industry: Entertainment, art and recreation industry.

3. Foodservice Industry: Eating & drinking places, and grocery stores.

4. General Retail Trade Industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops.

   Incidental Purchases Industry: See above, General Retail Trade Industry.

5. Lodging Industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.

6. Public Transportation Industry: Air transportation, taxicab companies, interurban & rural bus transportation, railroad passenger transportation (Amtrak) and water passenger transportation. Also is the "dummy" industry of "other transportation."

7. Travel Arrangement Industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

1987 SIC – 1997 NAICS:
SELECTED TRAVEL-RELATED CATEGORIES

SIC DESCRIPTION(S)	SIC CODE(S)	NAICS DESCRIPTION(S)	NAICS CODE(S)
Accommodations			
Hotels and Motels	701	***Traveler Accommodation***	7211
Recreational Vehicle Parks & Campsites	703	***Recreational Vehicle Parks & Campgrounds***	7212
Auto Transportation			
Passenger Car Rental	7514	***Passenger Car Rental***	532111
Gasoline Service Stations	554	***Gasoline Stations with Convenience Stores; Other Gasoline Stations***	447110; 447190
Automotive Dealers	55 *(excl. 554)*	***Motor Vehicle & Parts Dealers***	4411; 4412; 4413
Entertainment and Recreation			
Amusement and Recreational Services	79	***Amusement, Gambling & Recreation Industries***	713
		Performing Arts, Spectator Sports & Related Industries	711
Museums, Art Galleries, Botanical and Zoological Gardens	84	***Museums, Historical Sites & Similar Institutions***	712
Food			
Eating & Drinking Places (Alcoholic Beverages)	581	***Foodservices & Drinking Places***	7221; 7222; 7224
Grocery Stores	541	***Food and Beverage stores***	4451; 4452; 4453
Public Transportation			
Air Transportation	45	***Passenger Air Transportation; Airport Support Activities***	481; 4881
Rail - Local & Suburban Transit	4111	***Rail Transportation***	485112
Interurban & Rural Bus Carriers	413	***Interurban & Rural Bus Transportation***	4852
Charter Bus/Interstate	4142	***Charter Bus (interstate/interurban)***	4855102
Taxi & Limousine Services	412	***Taxi & Limousine Services***	4853
Water Transportation of Passengers	448	***Water Passenger Transportation***	483112; 483114; 483212
--	--	***Scenic & Sightseeing Transportation*** ***(New industry-includes parts of SICs 4119,4489,4522,4789,7999)***	487
Retail			
General Merchandise Stores	53	***General Merchandise Stores***	452
Miscellaneous Retail Stores	59	***Other Retail Stores***	453; 44611; 4483; 45111; 45112; 45121
Travel Arrangement			
Travel Arrangement	472	***Travel Arrangement & Reservation Services***	5615
		(includes travel agencies and tour operators)	

Appendix D: Sources of Data

This appendix presents the sources of data used in this report.

Organizations

Airlines for America (A4A), (formerly known as Air Transport Association of America - ATA)
American Automobile Association
Amtrak
Bureau of the Census, U.S. Department of Commerce
Bureau of Economic Analysis, U.S. Department of Commerce
Bureau of Labor Statistics, U.S. Department of Labor
Bureau of Transportation Statistics, U.S. Department of Transportation
Federal Aviation Administration, U.S. Department of Transportation
Federal Highway Administration, U.S. Department of Transportation
National Park Service
North Carolina Department of Commerce - Division of Tourism, Film & Sports Development
North Carolina Department of Transportation
North Carolina Department of Revenue
North Carolina Employment Security Commission
Smith Travel Research
The Office of Travel and Tourism Industries (OTTI)/ITA, U.S. Department of Commerce
U.S. Travel Association