

**The Economic Impact
Of Travel On
North Carolina Counties
2007**

A Study Prepared for the
**North Carolina Division of
Tourism, Film and Sports Development**
by the
Travel Industry Association
Washington, D.C.
July 2008

PREFACE

This study was conducted by the Research Department of the Travel Industry Association (TIA) for the **North Carolina Division of Tourism, Film and Sports Development**. The study provides preliminary 2007 and 2006 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 2007 and 2006 estimates of domestic travelers' expenditures and employment, payroll income, and state and local tax revenue directly generated by these expenditures for each of 100 counties in North Carolina.

Travel Industry Association
Washington, D.C.
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INTRODUCTION

This report presents preliminary 2007 estimates of the impact of U.S. resident travelers' expenditures in North Carolina, as well as the employment, payroll income and tax revenue directly generated by these expenditures. For the purpose of comparison, 2006 impact data are also included in this report.

All estimates of the economic impact of travel contained in this volume are the product of TIA'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 in 1975 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 upon 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 TIA and other travel-related data developed by TIA, various federal agencies and national travel organizations each year. A summary of the methodology is provided in Appendix A.

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 2007 will become available subsequent to this study, TIA reserves the right to revise these estimates in the future.

EXECUTIVE SUMMARY

- Domestic and international travelers directly spent more than \$17.1 billion in North Carolina during 2007, up 7.4 percent from 2006.
- Domestic and international travelers' expenditures generated employees in North Carolina earned nearly \$4.2 billion in payroll income during 2007. This represented an increase of 4.3 percent from 2006.
- Domestic and international travelers' expenditures directly generated 198.9 thousand jobs within North Carolina in 2007, up 2.2 percent from 2006. These jobs composed 4.8 percent of total state non-agricultural employment in 2007.
- On average, every \$86,049 spent by domestic and international travelers in North Carolina during 2007 generated one job.
- Domestic and international travelers' expenditures in North Carolina directly generated close to \$2.7 billion in tax revenue for federal, state and local governments in 2007, up 4.6 from 2006.
- Mecklenburg County received over \$3.4 billion in domestic travelers' expenditures to lead all of North Carolina's 100 counties. Wake County ranked second with nearly \$1.5 billion, followed by Guilford County with close to \$1.1 billion.
- Thirty five of North Carolina's 100 counties received over \$100 million in domestic travelers' expenditures in 2007.
- Thirty three counties in North Carolina indicated one thousand or more jobs directly supported by domestic travelers during 2007.

TRAVEL IMPACT ON U.S. ECONOMY IN 2007

The U.S. economy continued to grow in 2007, but at a slower pace. The real GDP increased 2.2 percent compared with 2006. Real disposable income was up 3.1 percent and real personal consumption expenditures rose 2.9 percent from 2006. Annual average total non-farm employment in the U.S. increased 1.5 million to 137.6 million, up 1.1 percent over 2006. The national unemployment rate remained the same as 2006 at 4.6 percent. The travel industry performed better in the job market than national average, nearly 133 thousands jobs were added during 2007, a 1.8 percent increase from 2006. The Consumer Price Index (CPI), an indicator of the level of price inflation, was up 2.8 percent in 2007, while TIA's Travel Price Index increased 4.5 percent during the same period. The total U.S. current account deficit decreased to \$731.2 billion in 2007, down 7.2 percent from 2006. The U.S. travel industry generated more than \$17.6 billion trade surplus for the country in 2007.

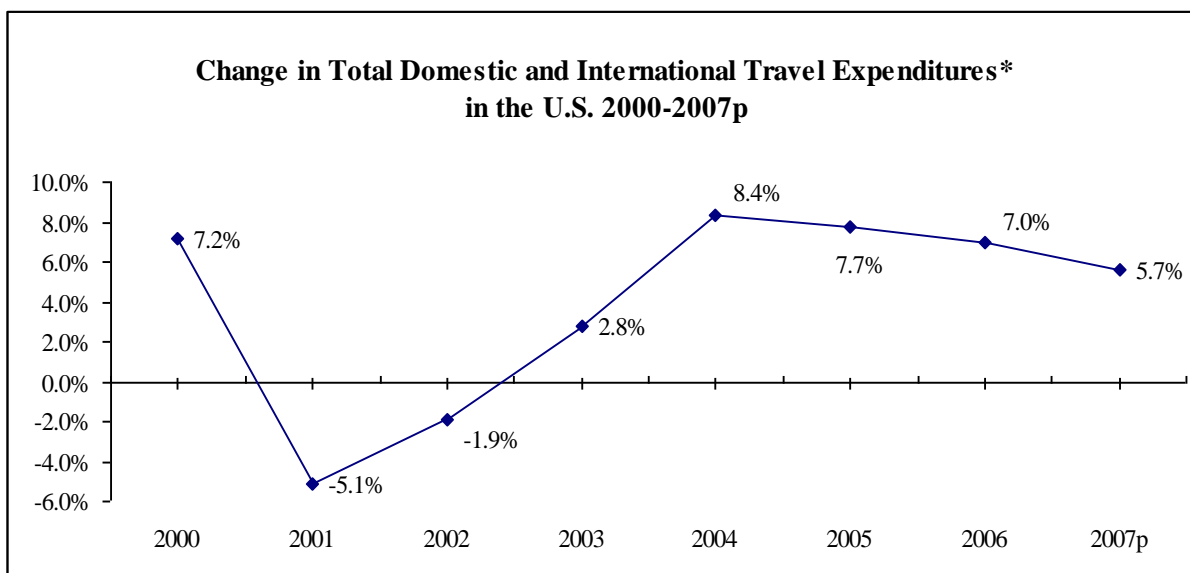
U.S. Travel Volume in 2007

In 2007, total U.S. domestic person-trips were up 0.4 percent over 2006. International visitors to the U.S. increased 10 percent in 2007 to nearly 56 million. Among the international visitors, overseas visitors were up 10 percent to 23.9 million, Canadian visitors increased 11 percent to 17.8 million, and Mexican visitors increased 8 percent to 14.3 million. However, the volume of overseas visitors traveled to the U.S. in 2007 remained 8 percent lower than its historical record set in 2000.

Travel Expenditures in 2007

In 2007, domestic and international travelers' expenditures in the U.S. totaled \$739.4 billion, 5.7 percent more than in 2006. Foodservices sector continually ranked number one among the six industry sectors investigated in this report, totaling \$175.2 billion and representing 23.7 percent of the total travelers' spending. Travel spending on auto transportation reached \$125.8 billion in 2007, a 6.7 percent increase over 2006, largely due to higher gasoline prices. Travel spending on lodging increased 7.6 percent over 2006, the greatest growth among the six industry sectors. According to Smith Travel Research, hotel room demand (hotel room-nights sold) grew 1.2 percent and average daily rate jumped 5.9 percent in 2007.

International travelers' spending jumped 12.8 percent from 2006, totaling \$96.7 billion, while domestic travelers' spending reached \$642.7 billion, up 4.7 percent from 2006.



Sources: TIA, OTTI

P: preliminary

* Excludes international passenger fare payments.

Table 1: Domestic and International Travelers' Expenditures in the U.S. 2006-2007

| <u>Industry Sector*</u> | 2006 Travel Spending in The U.S. (\$ Billions) | 2007p Travel Spending in The U.S. (\$ Billions) | 2007 Percent Change Over 2006 (%) |
|--------------------------|---|--|--|
| Public Transportation | \$127.6 | \$132.5 | 3.9% |
| Auto Transportation | 118.0 | 125.8 | 6.7% |
| Lodging | 135.6 | 145.9 | 7.6% |
| Foodservice | 166.1 | 175.2 | 5.5% |
| Entertainment/Recreation | 79.6 | 82.8 | 4.1% |
| General Retail | 72.9 | 77.1 | 5.8% |
| Total | \$699.8 | \$739.4 | 5.7% |
| International* | \$85.7 | \$96.7 | 12.8% |
| Domestic | \$614.1 | \$642.7 | 4.7% |

Source: TIA

P: preliminary

* Excludes international passenger fare payments.

Travel Employment in 2007

More than 1.5 million jobs were added to the non-farm sector in 2007, a 1.1 percent increase from 2006, according to the U.S. Bureau of Labor Statistics (BLS). The national unemployment rate kept unchanged compared with 2006 at 4.6 percent. Total domestic and international travelers' spending in the U.S. directly generated nearly 7.7 million jobs for the U.S. economy in 2007, up 1.8 percent from 2006.

Among the seven travel industry categories investigated in this report for employment, the greatest gain occurred in the arts/entertainment/recreation industry, with employment up 2.5 percent from 2006. The employment generated by total travelers' spending in the foodservices industry reached 2.9 million, up 2.0 percent over 2006. The jobs generated by total travelers' spending in lodging sector increased 1.5 percent from 2006 to 1.5 million. Total travel-generated employment in the public transportation sector increased 1.4 percent.

International travelers' spending generated more than 972 thousand jobs, up 8.8 percent from 2006, while domestic travelers' spending generated 6.7 million jobs, a 0.8 percent increase over 2006.

Table 2: Domestic and International Travelers' Expenditures Generated Employment in the U.S., 2006 and 2007

| <u>Industry Sector</u> | 2006 Travel-Generated Employment (Thousands) | 2007p Travel-Generated Employment (Thousands) | 2007 Percent Change Over 2006 (%) |
|--------------------------|---|--|--|
| Public Transportation | 983.2 | 996.5 | 1.4% |
| Auto Transportation | 270.3 | 272.6 | 0.8% |
| Lodging | 1,498.6 | 1,520.6 | 1.5% |
| Foodservice | 2,874.0 | 2,930.2 | 2.0% |
| Entertainment/Recreation | 1,258.1 | 1,289.7 | 2.5% |
| General Retail | 482.9 | 489.7 | 1.4% |
| Travel Planning | 176.2 | 176.9 | 0.4% |
| Total | 7,543.4 | 7,676.2 | 1.8% |
| International* | 893.5 | 972.2 | 8.8% |
| Domestic | 6,649.9 | 6,704.0 | 0.8% |

Sources: TIA, BLS

P: preliminary

* Excludes jobs generated by international passenger fare payments.

Table 3: Overall U.S. Economic Developments, 2005-2007

| <u>Sector</u> | <u>2005</u> | <u>2006</u> | <u>2007p</u> |
|---|-------------|-------------|--------------|
| Nominal gross domestic product (\$ Billions) | \$12,433.9 | \$13,194.7 | \$13,841.3 |
| Real gross domestic product (\$ Billions)* | \$11,003.4 | \$11,319.4 | \$11,566.8 |
| Real disposable personal income (\$ Billions)* | \$8,147.9 | \$8,396.9 | \$8,658.6 |
| Real personal consumption expenditures (\$ Billions)* | \$7,803.6 | \$8,044.1 | \$8,277.8 |
| Consumer price index** | 195.3 | 201.6 | 207.3 |
| Travel Price Index** | 222.6 | 233.5 | 244.0 |
| Non-farm payroll employment (Millions) | 133.7 | 136.1 | 137.6 |
| Unemployment rate (%) | 5.1 | 4.6 | 4.6 |

Percentage change from previous year

| | | | |
|--|------|------|------|
| Nominal gross domestic product | 6.4% | 6.1% | 4.9% |
| Real gross domestic product | 3.1% | 2.9% | 2.2% |
| Real disposable personal income | 7.8% | 3.1% | 3.1% |
| Real personal consumption expenditures | 3.2% | 3.1% | 2.9% |
| Consumer price index | 3.4% | 3.2% | 2.8% |
| Travel Price Index | 5.3% | 4.9% | 4.5% |
| Non-farm payroll employment | 1.7% | 1.8% | 1.1% |

Sources: U.S. Dept. of Commerce, U.S. Dept. of Labor, U.S. Census Bureau, TIA

P: preliminary

* Chained 2000 dollars

** Base period: 1982-84=100

Table 4: U.S. Travel Trends, 2003-2007

| <u>Category</u> | <u>2003</u> | <u>2004</u> | <u>2005</u> | <u>2006</u> | <u>2007p</u> |
|---|----------------|----------------|----------------|----------------|----------------|
| Total travel expenditures (\$ billions) | \$560.1 | \$606.9 | \$653.8 | \$699.8 | \$739.4 |
| <i>U.S. travelers' expenditures (\$ billions)</i> | <i>\$495.8</i> | <i>\$532.4</i> | <i>\$572.1</i> | <i>\$614.1</i> | <i>\$642.7</i> |
| <i>International travelers' expenditures in the U.S.* (\$ billions)</i> | <i>\$64.3</i> | <i>\$74.5</i> | <i>\$81.7</i> | <i>\$85.7</i> | <i>\$96.7</i> |
| Travel price index** | 202.0 | 211.3 | 222.6 | 233.5 | 244.0 |
| Travel-generated employment*** (thousands) | 7,335.7 | 7,452.7 | 7,508.8 | 7,543.4 | 7,676.2 |
| | | | | | |
| <i>Percentage change from previous year</i> | | | | | |
| Total travel expenditures | 2.8% | 8.3% | 7.7% | 7.0% | 5.7% |
| <i>U.S. travelers' expenditures</i> | <i>3.7%</i> | <i>7.4%</i> | <i>7.5%</i> | <i>7.3%</i> | <i>4.7%</i> |
| <i>International travelers' expenditures in the U.S.</i> | <i>-3.4%</i> | <i>15.8%</i> | <i>9.6%</i> | <i>4.9%</i> | <i>12.8%</i> |
| Travel price index | 2.5% | 4.6% | 5.3% | 4.9% | 4.5% |
| Travel-generated employment | -1.4% | 1.6% | 0.8% | 0.5% | 1.8% |

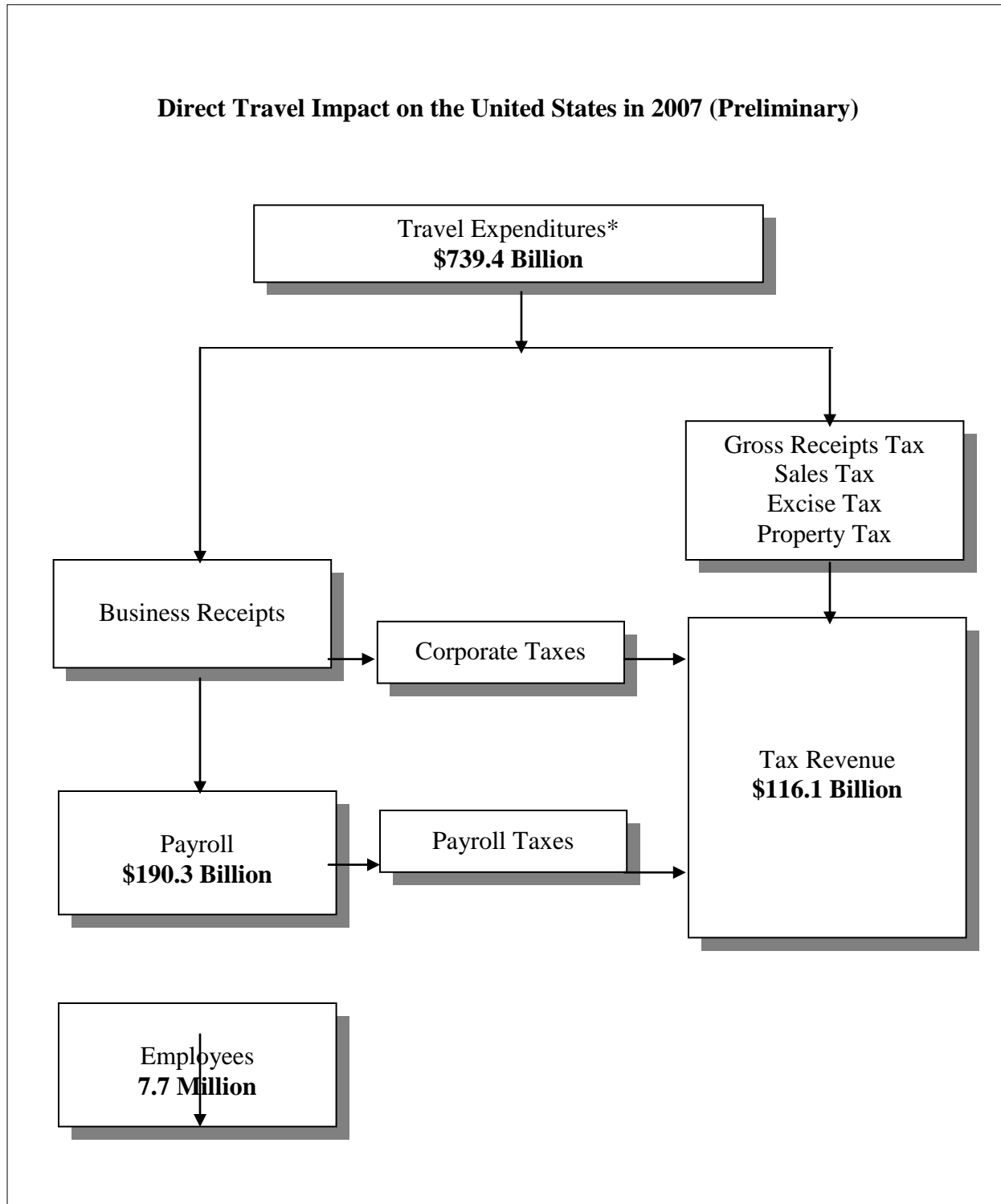
Sources: TIA, Office of Travel and Tourism Industries (OTTI)/International Trade Administration, BLS, BEA

P: preliminary

* International traveler spending does not include international passenger fares.

** Base period: 1982-84=100

*** Includes employment generated by both domestic and international traveler expenditures.



Source: TIA

* Excludes international passenger fare payments and other economic impact generated by these payments.

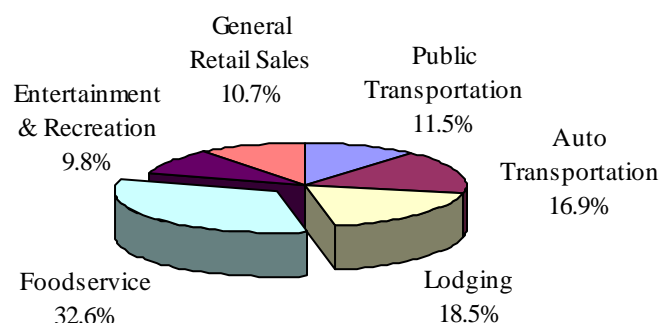
TRAVEL IMPACT ON NORTH CAROLINA

TRAVEL IMPACT ON NORTH CAROLINA - 2007

Travel Expenditures

- Domestic and international travelers in North Carolina directly spent over \$17.1 billion during 2007 on transportation, lodging, food, entertainment and recreation, and retail trade, representing a 7.4 percent increase over 2006. Domestic travelers' expenditures reached \$16.5 billion in 2007, up 7.2 percent over 2006 while total direct international travelers' expenditures increased to \$607 million, a 13.2 percent jump from 2006.
- In 2007, foodservice, the largest domestic traveler spending sector in North Carolina reached close to \$5.4 billion and accounted for nearly one third (32.6%) of the state total domestic travelers' expenditures, up 6.4 percent from 2006.
- Domestic lodging expenditures ranked second with more than \$3.0 billion, 18.5 percent of the state total, up 8.7 percent from 2006.
- Domestic travelers spent nearly \$2.8 billion on auto transportation, up 7.6 percent from 2006.
- Domestic travelers' spending on public transportation reached \$1.9 billion, a 10.2 percent jump over 2006, the greatest growth among six spending sectors.

**Domestic Travelers' Expenditures in North Carolina
by Industry Sector, 2007**



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.

Travel Expenditures

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

| <i>2007 Expenditures</i> | Total (\$ Millions) | % of Domestic Total |
|--|------------------------|---------------------|
| Public Transportation | \$1,901.7 | 11.5% |
| Auto Transportation | 2,794.8 | 16.9% |
| Lodging | 3,047.5 | 18.5% |
| Foodservice | 5,383.0 | 32.6% |
| Entertainment & Recreation | 1,614.2 | 9.8% |
| General Retail Sales | 1,769.5 | 10.7% |
| <hr/> | | |
| Domestic Total | \$16,510.7 | 100.0% |
| International Total | \$607.0 | |
| Grand Total | \$17,117.7 | |
| | | |
| <i>2006 Expenditures</i> | | |
| Public Transportation | \$1,725.6 | 11.2% |
| Auto Transportation | 2,596.3 | 16.9% |
| Lodging | 2,804.8 | 18.2% |
| Foodservice | 5,057.9 | 32.9% |
| Entertainment & Recreation | 1,545.9 | 10.0% |
| General Retail Sales | 1,665.0 | 10.8% |
| <hr/> | | |
| Domestic Total | \$15,395.5 | 100.0% |
| International Total | \$536.4 | |
| Grand Total | \$15,931.9 | |
| | | |
| <i>Percentage Change 2007 over 2006</i> | | |
| Public Transportation | 10.2% | |
| Auto Transportation | 7.6% | |
| Lodging | 8.7% | |
| Foodservice | 6.4% | |
| Entertainment & Recreation | 4.4% | |
| General Retail Sales | 6.3% | |
| <hr/> | | |
| Domestic Total | 7.2% | |
| International Total | 13.2% | |
| Grand Total | 7.4% | |

Source: TIA

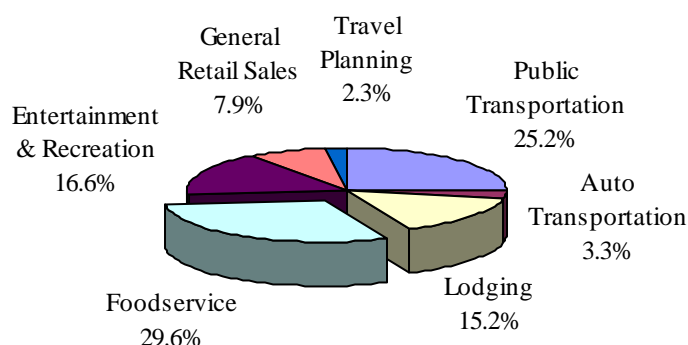
TRAVEL IMPACT ON NORTH CAROLINA - 2007

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 \$4.2 billion in 2007, up 4.3 percent from 2006.
- In 2007, total direct domestic travel expenditures generated \$4.0 billion payroll income in North Carolina, a 4.1 percent increase from 2006, while total direct international travel expenditures generated more than \$169 million payroll income, up 9.8 percent over 2006.
- On average, every dollar spent by domestic and international travelers produced 24 cents in wage and salary income for North Carolina residents in 2007.
- The foodservice sector posted nearly \$1.2 billion in payroll income generated by domestic travel in 2007, up 7.6 percent from 2006, the largest increase in payroll income among seven payroll sectors reported.

**Domestic Travelers' Expenditures
Generated Payroll
in North Carolina by Industry Sector, 2007**



Travel-Generated Payroll

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

| <i>2007 Payroll</i> | Total (\$ Millions) | % of Total |
|---|------------------------|------------|
| Public Transportation | \$1,012.3 | 25.2% |
| Auto Transportation | 134.6 | 3.3% |
| Lodging | 610.3 | 15.2% |
| Foodservice | 1,192.4 | 29.6% |
| Entertainment & Recreation | 666.7 | 16.6% |
| General Retail Sales | 316.5 | 7.9% |
| Travel Planning* | 90.7 | 2.3% |
| <hr/> | | |
| Domestic Total | \$4,023.6 | 100.0% |
| International Total | \$169.4 | |
| Grand Total | \$4,193.0 | |
| <hr/> | | |
| <i>2006 Payroll</i> | | |
| Public Transportation | \$1,010.5 | 26.1% |
| Auto Transportation | 129.8 | 3.4% |
| Lodging | 584.7 | 15.1% |
| Foodservice | 1,108.5 | 28.7% |
| Entertainment & Recreation | 638.9 | 16.5% |
| General Retail Sales | 306.5 | 7.9% |
| Travel Planning* | 85.6 | 2.2% |
| <hr/> | | |
| Domestic Total | \$3,864.7 | 100.0% |
| International Total | \$154.2 | |
| Grand Total | \$4,018.9 | |
| <hr/> | | |
| <i>Percentage Change 2007 over 2006</i> | | |
| Public Transportation | 0.2% | |
| Auto Transportation | 3.7% | |
| Lodging | 4.4% | |
| Foodservice | 7.6% | |
| Entertainment & Recreation | 4.3% | |
| General Retail Sales | 3.3% | |
| Travel Planning* | 5.9% | |
| <hr/> | | |
| Domestic Total | 4.1% | |
| International Total | 9.8% | |
| Grand Total | 4.3% | |

Source: TIA

* 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.

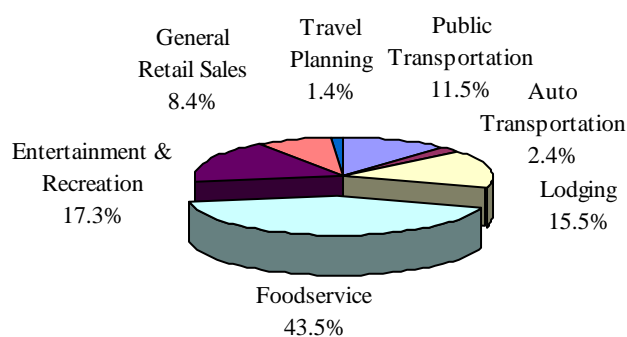
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Travel-Generated Employment

The most impressive contribution that travel and tourism make 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 2007, direct domestic and international traveler spending in North Carolina generated 198.9 thousand jobs, including full-time and seasonal/part-time positions in the state, up 2.2 percent from 2006.
- On average, every \$86,049 spent by domestic and international travelers in North Carolina directly supported one job in 2007.
- During 2007, direct domestic travelers' expenditures generated 190.9 thousand jobs, a 2.0 percent increase over 2006, while international travelers' expenditures directly generated 8.0 thousand jobs for North Carolina economy, up 7.6 percent over 2006.
- It is important to note that these travel-related jobs composed 4.8 percent of total non-agricultural employment in North Carolina during 2007. Without these jobs, North Carolina's 2007 unemployment rate of 4.7 percent would have been 4.4 percentage points higher, or the equivalent of 9.1 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 2007, domestic travelers' spending in this sector supported 83.1 thousand jobs, accounting for 43.5 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, 2007**



Travel-Generated Employment

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

| <i>2007 Employment</i> | Total (thousands) | % of Total |
|--|----------------------|------------|
| Public Transportation | 22.0 | 11.5% |
| Auto Transportation | 4.6 | 2.4% |
| Lodging | 29.7 | 15.5% |
| Foodservice | 83.1 | 43.5% |
| Entertainment & Recreation | 33.0 | 17.3% |
| General Retail Sales | 16.0 | 8.4% |
| Travel Planning* | 2.7 | 1.4% |
| Domestic Total | 190.9 | 100.0% |
| International Total | 8.0 | |
| Grand Total | 198.9 | |
| <i>2006 Employment</i> | | |
| Public Transportation | 22.1 | 11.8% |
| Auto Transportation | 4.4 | 2.4% |
| Lodging | 29.2 | 15.6% |
| Foodservice | 80.7 | 43.1% |
| Entertainment & Recreation | 32.3 | 17.2% |
| General Retail Sales | 15.9 | 8.5% |
| Travel Planning* | 2.7 | 1.4% |
| Domestic Total | 187.2 | 100.0% |
| International Total | 7.5 | |
| Grand Total | 194.7 | |
| <i>Percentage Change 2007 over 2006</i> | | |
| Public Transportation | -0.6% | |
| Auto Transportation | 2.4% | |
| Lodging | 1.8% | |
| Foodservice | 3.0% | |
| Entertainment & Recreation | 2.3% | |
| General Retail Sales | 0.4% | |
| Travel Planning* | 0.3% | |
| Domestic Total | 2.0% | |
| International Total | 7.6% | |
| Grand Total | 2.2% | |

Source: TIA

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 - 2007

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 2007, total tax revenue, including federal, state and local taxes, generated by domestic and international traveler spending in North Carolina was nearly \$2.7 billion, up 4.6 percent from 2006. Domestic travel expenditures generated close to \$2.6 billion, up 4.4 percent, while international travel expenditures generated almost \$100 million, a 10.2 percent jump over 2006.
- Domestic travelers' spending in North Carolina generated more than \$1.2 billion for the federal government in 2007, up 5.0 percent from 2006. This represents 47.6 percent of all domestic travel-generated tax collections in the state. Each dollar spent by domestic travelers in North Carolina produced 7.4 cents for federal tax coffers.
- Spending by domestic travelers in North Carolina also generated \$815 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 31.7 percent of all domestic travel-generated tax revenue collected in the state for 2007. On average, each travel dollar produced 4.9 cents in state tax receipts.
- Local governments in North Carolina directly benefited from travel as well. During 2007, domestic travel spending generated \$529 million in sales and property tax revenue for localities, up 6.6 percent from 2006. This represents 20.6 percent of total domestic travel-generated tax revenue in the state. Each domestic travel dollar produced 3.2 cents for local tax coffers.

**Domestic Travelers' Expenditures
Generated Tax Revenue
in North Carolina by Level of Government, 2007**

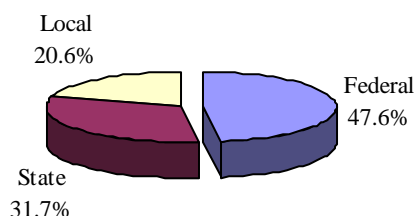


Table 8: Direct Domestic Travel-Generated Tax Revenue in North Carolina by Level of Government

| <i>2007 Tax Revenue</i> | Total (\$ Millions) | % of Total |
|---|------------------------|------------|
| Federal | \$1,223.3 | 47.6% |
| State | 815.0 | 31.7% |
| Local | 529.0 | 20.6% |
| Domestic Total | \$2,567.3 | 100.0% |
| International Total | \$99.6 | |
| Grand Total | \$2,666.9 | |
| <i>2006 Tax Revenue</i> | | |
| Federal | \$1,164.7 | 47.4% |
| State | 797.2 | 32.4% |
| Local | 496.4 | 20.2% |
| Domestic Total | \$2,458.3 | 100.0% |
| International Total | \$90.4 | |
| Grand Total | \$2,548.7 | |
| <i>Percentage Change 2007 over 2006</i> | | |
| Federal | 5.0% | |
| State | 2.2% | |
| Local | 6.6% | |
| Domestic Total | 4.4% | |
| International Total | 10.2% | |
| Grand Total | 4.6% | |

Source: TIA

DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA COUNTIES-2007

During 2007, domestic travelers spent more than \$16.5 billion while traveling in North Carolina, up 7.2 percent from 2006. These expenditures directly generated \$4.0 billion in payroll income and 190.9 thousand jobs for North Carolina residents. The federal government received more than \$1.2 billion in tax revenue through the domestic travel industry in North Carolina in 2007. Additionally, domestic traveler expenditures generated \$815 million in tax revenue for the state treasury and \$529 million tax revenue for local governments during 2007.

Travel expenditures occurred throughout all the one hundred counties in North Carolina. The top five counties in North Carolina received close to \$7.5 billion in direct domestic travel expenditures during 2007, 45.3 percent of the state total. Direct domestic travelers' spending in the top five counties generated more than \$2.3 billion in payroll income and supported 93.6 thousand jobs in 2007.

DOMESTIC TRAVEL IMPACT IN TOP 5 COUNTIES

Mecklenburg County, including the city of Charlotte, led all counties in domestic travelers' expenditures, payroll income, jobs, and state and local taxes directly generated by domestic visitor spending in 2007. Domestic travelers' spending in Mecklenburg County was more than \$3.4 billion, accounting for 20.9 percent of the state total. These expenditures generated more than \$1.2 billion in payroll income and supported 41.3 thousand jobs for county residents in 2007.

Wake County ranked second with nearly \$1.5 billion in domestic travelers' spending in 2007, representing 9.0 percent of the state total. The payroll income and jobs directly attributable to domestic travelers' spending reached \$486 million and 18.6 thousand jobs.

Guilford County posted close to \$1.1 billion in domestic travelers' expenditures to rank third. These expenditures generated more than \$277 million in payroll income as well as 13.0 thousand jobs within the county in 2007.

Dare County received nearly \$763 million from domestic travelers in 2007. These travel expenditures benefited county residents with nearly \$166 million in payroll income and 11.2 thousand jobs.

Buncombe County ranked fifth with \$709 million in direct domestic traveler expenditures during 2007. These receipts from domestic travelers generated more than \$164 million in payroll income and 9.4 thousand jobs within the county.

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

| <i>2007 Travel Impact</i> | | | | | |
|--|-------------------------------|--------------------------|---------------------------|--|--|
| County | Expenditures (\$ Millions) | Payroll (\$ Millions) | Employment (Thousands) | State Tax Receipts (\$ Millions) | Local Tax Receipts (\$ Millions) |
| MECKLENBURG | \$3,447.4 | \$1,228.0 | 41.3 | \$157.7 | \$92.1 |
| WAKE | 1,480.2 | 486.0 | 18.6 | 68.8 | 42.3 |
| GUILFORD | 1,083.7 | 277.4 | 13.0 | 54.0 | 26.2 |
| DARE | 762.7 | 165.6 | 11.2 | 36.1 | 36.3 |
| BUNCOMBE | 709.4 | 164.4 | 9.4 | 35.2 | 22.7 |
| FIVE COUNTY TOTAL | \$7,483.3 | \$2,321.4 | 93.6 | \$352.0 | \$219.7 |
| STATE TOTALS | \$16,510.7 | \$4,023.6 | 190.9 | \$815.0 | \$529.0 |
| FIVE COUNTY SHARE | 45.3% | 57.7% | 49.0% | 43.2% | 41.5% |
| <i>2006 Travel Impact</i> | | | | | |
| MECKLENBURG | \$3,148.5 | \$1,160.7 | \$39.8 | \$151.0 | \$84.4 |
| WAKE | 1,337.1 | 454.4 | 17.7 | 65.2 | 38.4 |
| GUILFORD | 1,025.5 | 271.7 | 13.0 | 53.6 | 24.9 |
| DARE | 702.3 | 157.8 | 10.9 | 34.9 | 33.6 |
| BUNCOMBE | 645.7 | 154.9 | 9.0 | 33.6 | 20.7 |
| FIVE COUNTY TOTAL | \$6,859.1 | \$2,199.5 | 90.3 | \$338.3 | \$201.9 |
| STATE TOTALS | \$15,395.5 | \$3,864.7 | 187.2 | \$797.2 | \$496.4 |
| FIVE COUNTY SHARE | 44.6% | 56.9% | 48.2% | 42.4% | 40.7% |
| <i>Percent Change 2007 over 2006</i> | | | | | |
| MECKLENBURG | 9.5% | 5.8% | 4.0% | 4.4% | 9.2% |
| WAKE | 10.7% | 7.0% | 5.1% | 5.6% | 10.4% |
| GUILFORD | 5.7% | 2.1% | 0.3% | 0.8% | 5.4% |
| DARE | 8.6% | 4.9% | 3.1% | 3.6% | 8.3% |
| BUNCOMBE | 9.9% | 6.2% | 4.3% | 4.8% | 9.5% |
| FIVE COUNTY TOTAL | 9.1% | 5.5% | 3.6% | 4.0% | 8.8% |
| STATE TOTALS | 7.2% | 4.1% | 2.0% | 2.2% | 6.6% |

Source: TIA

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the TIA's Travel Economic Impact Model for North Carolina in 2007 and 2006. The estimates presented are for direct domestic travel expenditures and related economic impact.

- Table A shows the counties listed alphabetically, with 2007 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 2007 travel expenditures from highest to lowest.
- Table C shows the percent distribution for each impact measure in 2007.
- Table D shows the percent change in 2007 over 2006 estimates for each of the measures of economic impact.
- Table E shows the counties listed alphabetically, with 2006 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table A: Alphabetical By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table A: Alphabetical by County, 2007 | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| ALAMANCE | \$140.84 | \$22.99 | 1.32 | \$7.84 | \$2.60 |
| ALEXANDER | 16.81 | 2.48 | 0.12 | 0.88 | 0.74 |
| ALLEGHANY | 19.43 | 3.65 | 0.18 | 0.91 | 1.35 |
| ANSON | 14.28 | 1.84 | 0.11 | 0.79 | 0.37 |
| ASHE | 39.94 | 6.11 | 0.37 | 1.98 | 2.28 |
| AVERY | 90.72 | 22.07 | 1.23 | 4.49 | 4.16 |
| BEAUFORT | 64.97 | 8.79 | 0.45 | 3.13 | 4.11 |
| BERTIE | 10.85 | 1.16 | 0.05 | 0.56 | 0.65 |
| BLADEN | 30.61 | 3.47 | 0.19 | 1.71 | 0.94 |
| BRUNSWICK | 392.19 | 77.69 | 4.97 | 17.99 | 25.48 |
| BUNCOMBE | 709.38 | 164.38 | 9.35 | 35.24 | 22.72 |
| BURKE | 73.22 | 11.22 | 0.65 | 3.85 | 2.26 |
| CABARRUS | 275.41 | 65.58 | 3.50 | 15.34 | 4.56 |
| CALDWELL | 46.55 | 7.23 | 0.37 | 2.39 | 1.54 |
| CAMDEN | 1.69 | 0.20 | 0.01 | 0.09 | 0.15 |
| CARTERET | 269.56 | 50.96 | 3.17 | 11.99 | 17.39 |
| CASWELL | 6.54 | 0.71 | 0.04 | 0.30 | 0.49 |
| CATAWBA | 215.17 | 40.82 | 2.33 | 11.22 | 6.93 |
| CHATHAM | 24.83 | 3.16 | 0.17 | 1.40 | 0.47 |
| CHEROKEE | 35.60 | 5.77 | 0.34 | 1.66 | 2.24 |
| CHOWAN | 18.56 | 2.89 | 0.17 | 0.87 | 1.23 |
| CLAY | 12.43 | 1.42 | 0.07 | 0.50 | 1.44 |
| CLEVELAND | 87.20 | 13.00 | 0.71 | 4.86 | 1.60 |
| COLUMBUS | 45.22 | 5.65 | 0.31 | 2.46 | 1.32 |
| CRAVEN | 101.70 | 20.75 | 1.04 | 5.28 | 2.37 |
| CUMBERLAND | 369.33 | 74.88 | 4.00 | 19.10 | 8.13 |
| CURRITUCK | 120.01 | 23.53 | 1.52 | 5.09 | 5.91 |

Table A: Alphabetical By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table A: Alphabetical by County, 2007 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| DARE | 762.65 | 165.60 | 11.25 | 36.13 | 36.33 |
| DAVIDSON | 116.73 | 17.65 | 0.95 | 6.21 | 4.00 |
| DAVIE | 28.86 | 5.32 | 0.27 | 1.53 | 0.54 |
| DUPLIN | 33.29 | 4.02 | 0.21 | 1.83 | 1.04 |
| DURHAM | 533.80 | 114.34 | 7.27 | 27.83 | 16.25 |
| EDGECOMBE | 48.98 | 7.03 | 0.38 | 2.56 | 0.88 |
| FORSYTH | 598.75 | 106.75 | 5.94 | 33.46 | 11.79 |
| FRANKLIN | 16.50 | 2.01 | 0.11 | 0.87 | 0.43 |
| GASTON | 187.22 | 30.76 | 1.74 | 10.19 | 3.29 |
| GATES | 5.14 | 0.46 | 0.02 | 0.29 | 0.21 |
| GRAHAM | 24.54 | 4.49 | 0.29 | 1.13 | 1.69 |
| GRANVILLE | 39.05 | 5.14 | 0.30 | 2.14 | 1.15 |
| GREENE | 4.47 | 0.46 | 0.03 | 0.24 | 0.16 |
| GUILFORD | 1,083.72 | 277.42 | 13.03 | 54.04 | 26.22 |
| HALIFAX | 64.80 | 8.37 | 0.46 | 3.74 | 1.50 |
| HARNETT | 62.68 | 9.43 | 0.55 | 3.32 | 1.50 |
| HAYWOOD | 116.64 | 23.83 | 1.40 | 5.83 | 5.01 |
| HENDERSON | 199.85 | 37.58 | 2.07 | 8.80 | 9.33 |
| HERTFORD | 24.53 | 3.31 | 0.19 | 1.36 | 0.64 |
| HOKE | 7.98 | 1.03 | 0.06 | 0.43 | 0.13 |
| HYDE | 27.29 | 5.50 | 0.37 | 1.27 | 1.53 |
| IREDELL | 182.84 | 30.46 | 1.74 | 9.69 | 5.97 |
| JACKSON | 72.61 | 12.58 | 0.70 | 3.23 | 5.94 |
| JOHNSTON | 174.14 | 27.80 | 1.66 | 9.31 | 4.66 |
| JONES | 3.39 | 0.49 | 0.02 | 0.19 | 0.11 |
| LEE | 56.80 | 10.55 | 0.59 | 3.09 | 1.16 |
| LENOIR | 72.04 | 12.65 | 0.66 | 3.80 | 1.48 |

Table A: Alphabetical By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table A: Alphabetical by County, 2007 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| LINCOLN | 39.51 | 6.67 | 0.34 | 2.08 | 1.24 | |
| MACON | 115.42 | 21.14 | 1.13 | 5.13 | 9.74 | |
| MADISON | 30.32 | 6.18 | 0.34 | 1.52 | 1.46 | |
| MARTIN | 27.24 | 4.25 | 0.25 | 1.42 | 0.72 | |
| MCDOWELL | 38.60 | 6.06 | 0.36 | 1.94 | 1.48 | |
| MECKLENBURG | 3,447.36 | 1,228.02 | 41.33 | 157.74 | 92.10 | |
| MITCHELL | 19.87 | 3.18 | 0.18 | 0.85 | 0.90 | |
| MONTGOMERY | 21.12 | 2.23 | 0.10 | 0.95 | 2.06 | |
| MOORE | 349.07 | 83.17 | 5.22 | 17.57 | 11.08 | |
| NASH | 218.37 | 44.79 | 2.87 | 11.08 | 6.10 | |
| NEW HANOVER | 426.08 | 99.17 | 5.67 | 20.36 | 16.69 | |
| NORTHAMPTON | 12.03 | 1.46 | 0.06 | 0.51 | 1.06 | |
| ONSLOW | 159.51 | 31.43 | 1.56 | 8.01 | 5.81 | |
| ORANGE | 147.55 | 28.62 | 1.74 | 7.80 | 3.05 | |
| PAMLICO | 14.98 | 1.86 | 0.09 | 0.61 | 1.75 | |
| PASQUOTANK | 47.55 | 7.66 | 0.47 | 2.52 | 1.13 | |
| PENDER | 66.29 | 11.78 | 0.69 | 2.97 | 4.73 | |
| PERQUIMANS | 8.23 | 1.04 | 0.04 | 0.34 | 0.97 | |
| PERSON | 28.81 | 3.77 | 0.22 | 1.58 | 0.68 | |
| PITT | 176.66 | 35.62 | 1.99 | 8.82 | 4.14 | |
| POLK | 19.60 | 2.96 | 0.17 | 0.97 | 1.17 | |
| RANDOLPH | 102.70 | 16.77 | 0.90 | 5.84 | 1.70 | |
| RICHMOND | 42.10 | 7.89 | 0.45 | 2.16 | 0.83 | |
| ROBESON | 115.39 | 18.09 | 1.12 | 6.29 | 2.19 | |
| ROCKINGHAM | 61.91 | 10.30 | 0.59 | 3.15 | 1.57 | |
| ROWAN | 118.27 | 20.40 | 1.20 | 6.06 | 3.91 | |
| RUTHERFORD | 135.06 | 20.26 | 1.21 | 7.61 | 4.25 | |

Table A: Alphabetical By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table A: Alphabetical by County, 2007 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| SAMPSON | 42.94 | 5.83 | 0.30 | 2.27 | 1.45 | |
| SCOTLAND | 34.99 | 6.01 | 0.36 | 1.84 | 0.65 | |
| STANLY | 66.76 | 9.29 | 0.52 | 3.66 | 2.12 | |
| STOKES | 19.42 | 2.59 | 0.13 | 0.94 | 0.80 | |
| SURRY | 83.32 | 12.71 | 0.70 | 4.43 | 1.88 | |
| SWAIN | 251.03 | 75.14 | 3.33 | 14.45 | 5.59 | |
| TRANSYLVANIA | 80.14 | 15.28 | 0.83 | 3.07 | 3.83 | |
| TYRRELL | 3.62 | 0.37 | 0.02 | 0.16 | 0.37 | |
| UNION | 93.29 | 15.28 | 0.88 | 5.00 | 1.78 | |
| VANCE | 40.24 | 5.79 | 0.31 | 2.23 | 1.27 | |
| WAKE | 1,480.16 | 486.02 | 18.61 | 68.82 | 42.34 | |
| WARREN | 20.34 | 2.59 | 0.12 | 0.73 | 1.84 | |
| WASHINGTON | 12.83 | 1.78 | 0.10 | 0.68 | 0.57 | |
| WATAUGA | 191.15 | 43.56 | 2.58 | 9.38 | 7.82 | |
| WAYNE | 113.03 | 15.95 | 0.90 | 6.57 | 1.83 | |
| WILKES | 61.42 | 9.39 | 0.55 | 2.89 | 1.45 | |
| WILSON | 86.98 | 13.69 | 0.79 | 4.83 | 1.75 | |
| YADKIN | 29.96 | 5.38 | 0.35 | 1.55 | 0.78 | |
| YANCEY | 27.20 | 4.78 | 0.24 | 1.20 | 2.03 | |
| STATE TOTALS | \$16,510.74 | \$4,023.59 | 190.89 | \$814.98 | \$529.03 | |

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Table B: Ranking Of Counties By Expenditure Levels, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|---|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table B: Ranking of Counties by Expenditure Levels, 2007 | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| MECKLENBURG | \$3,447.36 | \$1,228.02 | 41.33 | \$157.74 | \$92.10 |
| WAKE | 1,480.16 | 486.02 | 18.61 | 68.82 | 42.34 |
| GUILFORD | 1,083.72 | 277.42 | 13.03 | 54.04 | 26.22 |
| DARE | 762.65 | 165.60 | 11.25 | 36.13 | 36.33 |
| BUNCOMBE | 709.38 | 164.38 | 9.35 | 35.24 | 22.72 |
| FORSYTH | 598.75 | 106.75 | 5.94 | 33.46 | 11.79 |
| DURHAM | 533.80 | 114.34 | 7.27 | 27.83 | 16.25 |
| NEW HANOVER | 426.08 | 99.17 | 5.67 | 20.36 | 16.69 |
| BRUNSWICK | 392.19 | 77.69 | 4.97 | 17.99 | 25.48 |
| CUMBERLAND | 369.33 | 74.88 | 4.00 | 19.10 | 8.13 |
| MOORE | 349.07 | 83.17 | 5.22 | 17.57 | 11.08 |
| CABARRUS | 275.41 | 65.58 | 3.50 | 15.34 | 4.56 |
| CARTERET | 269.56 | 50.96 | 3.17 | 11.99 | 17.39 |
| SWAIN | 251.03 | 75.14 | 3.33 | 14.45 | 5.59 |
| NASH | 218.37 | 44.79 | 2.87 | 11.08 | 6.10 |
| CATAWBA | 215.17 | 40.82 | 2.33 | 11.22 | 6.93 |
| HENDERSON | 199.85 | 37.58 | 2.07 | 8.80 | 9.33 |
| WATAUGA | 191.15 | 43.56 | 2.58 | 9.38 | 7.82 |
| GASTON | 187.22 | 30.76 | 1.74 | 10.19 | 3.29 |
| IREDELL | 182.84 | 30.46 | 1.74 | 9.69 | 5.97 |
| PITT | 176.66 | 35.62 | 1.99 | 8.82 | 4.14 |
| JOHNSTON | 174.14 | 27.80 | 1.66 | 9.31 | 4.66 |
| ONslow | 159.51 | 31.43 | 1.56 | 8.01 | 5.81 |
| ORANGE | 147.55 | 28.62 | 1.74 | 7.80 | 3.05 |
| ALAMANCE | 140.84 | 22.99 | 1.32 | 7.84 | 2.60 |
| RUTHERFORD | 135.06 | 20.26 | 1.21 | 7.61 | 4.25 |
| CURRITUCK | 120.01 | 23.53 | 1.52 | 5.09 | 5.91 |

Table B: Ranking Of Counties By Expenditure Levels, 2007

2007 Impact of Travel on North Carolina**Table B: Ranking of Counties by Expenditure Levels, 2007 (Continued)**

| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
|---------------|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| ROWAN | 118.27 | 20.40 | 1.20 | 6.06 | 3.91 |
| DAVIDSON | 116.73 | 17.65 | 0.95 | 6.21 | 4.00 |
| HAYWOOD | 116.64 | 23.83 | 1.40 | 5.83 | 5.01 |
| MACON | 115.42 | 21.14 | 1.13 | 5.13 | 9.74 |
| ROBESON | 115.39 | 18.09 | 1.12 | 6.29 | 2.19 |
| WAYNE | 113.03 | 15.95 | 0.90 | 6.57 | 1.83 |
| RANDOLPH | 102.70 | 16.77 | 0.90 | 5.84 | 1.70 |
| CRAVEN | 101.70 | 20.75 | 1.04 | 5.28 | 2.37 |
| UNION | 93.29 | 15.28 | 0.88 | 5.00 | 1.78 |
| AVERY | 90.72 | 22.07 | 1.23 | 4.49 | 4.16 |
| CLEVELAND | 87.20 | 13.00 | 0.71 | 4.86 | 1.60 |
| WILSON | 86.98 | 13.69 | 0.79 | 4.83 | 1.75 |
| SURRY | 83.32 | 12.71 | 0.70 | 4.43 | 1.88 |
| TRANSYLVANIA | 80.14 | 15.28 | 0.83 | 3.07 | 3.83 |
| BURKE | 73.22 | 11.22 | 0.65 | 3.85 | 2.26 |
| JACKSON | 72.61 | 12.58 | 0.70 | 3.23 | 5.94 |
| LENOIR | 72.04 | 12.65 | 0.66 | 3.80 | 1.48 |
| STANLY | 66.76 | 9.29 | 0.52 | 3.66 | 2.12 |
| PENDER | 66.29 | 11.78 | 0.69 | 2.97 | 4.73 |
| BEAUFORT | 64.97 | 8.79 | 0.45 | 3.13 | 4.11 |
| HALIFAX | 64.80 | 8.37 | 0.46 | 3.74 | 1.50 |
| HARNETT | 62.68 | 9.43 | 0.55 | 3.32 | 1.50 |
| ROCKINGHAM | 61.91 | 10.30 | 0.59 | 3.15 | 1.57 |
| WILKES | 61.42 | 9.39 | 0.55 | 2.89 | 1.45 |
| LEE | 56.80 | 10.55 | 0.59 | 3.09 | 1.16 |
| EDGECOMBE | 48.98 | 7.03 | 0.38 | 2.56 | 0.88 |
| PASQUOTANK | 47.55 | 7.66 | 0.47 | 2.52 | 1.13 |

Table B: Ranking Of Counties By Expenditure Levels, 2007

| 2007 Impact of Travel on North Carolina | | | | | | |
|---|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table B: Ranking of Counties by Expenditure Levels, 2007 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| CALDWELL | 46.55 | 7.23 | 0.37 | 2.39 | 1.54 | |
| COLUMBUS | 45.22 | 5.65 | 0.31 | 2.46 | 1.32 | |
| SAMPSON | 42.94 | 5.83 | 0.30 | 2.27 | 1.45 | |
| RICHMOND | 42.10 | 7.89 | 0.45 | 2.16 | 0.83 | |
| VANCE | 40.24 | 5.79 | 0.31 | 2.23 | 1.27 | |
| ASHE | 39.94 | 6.11 | 0.37 | 1.98 | 2.28 | |
| LINCOLN | 39.51 | 6.67 | 0.34 | 2.08 | 1.24 | |
| GRANVILLE | 39.05 | 5.14 | 0.30 | 2.14 | 1.15 | |
| MCDOWELL | 38.60 | 6.06 | 0.36 | 1.94 | 1.48 | |
| CHEROKEE | 35.60 | 5.77 | 0.34 | 1.66 | 2.24 | |
| SCOTLAND | 34.99 | 6.01 | 0.36 | 1.84 | 0.65 | |
| DUPLIN | 33.29 | 4.02 | 0.21 | 1.83 | 1.04 | |
| BLADEN | 30.61 | 3.47 | 0.19 | 1.71 | 0.94 | |
| MADISON | 30.32 | 6.18 | 0.34 | 1.52 | 1.46 | |
| YADKIN | 29.96 | 5.38 | 0.35 | 1.55 | 0.78 | |
| DAVIE | 28.86 | 5.32 | 0.27 | 1.53 | 0.54 | |
| PERSON | 28.81 | 3.77 | 0.22 | 1.58 | 0.68 | |
| HYDE | 27.29 | 5.50 | 0.37 | 1.27 | 1.53 | |
| MARTIN | 27.24 | 4.25 | 0.25 | 1.42 | 0.72 | |
| YANCEY | 27.20 | 4.78 | 0.24 | 1.20 | 2.03 | |
| CHATHAM | 24.83 | 3.16 | 0.17 | 1.40 | 0.47 | |
| GRAHAM | 24.54 | 4.49 | 0.29 | 1.13 | 1.69 | |
| HERTFORD | 24.53 | 3.31 | 0.19 | 1.36 | 0.64 | |
| MONTGOMERY | 21.12 | 2.23 | 0.10 | 0.95 | 2.06 | |
| WARREN | 20.34 | 2.59 | 0.12 | 0.73 | 1.84 | |
| MITCHELL | 19.87 | 3.18 | 0.18 | 0.85 | 0.90 | |
| POLK | 19.60 | 2.96 | 0.17 | 0.97 | 1.17 | |

Table B: Ranking Of Counties By Expenditure Levels, 2007

| 2007 Impact of Travel on North Carolina | | | | | | |
|---|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table B: Ranking of Counties by Expenditure Levels, 2007 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| ALLEGHANY | 19.43 | 3.65 | 0.18 | 0.91 | 1.35 | |
| STOKES | 19.42 | 2.59 | 0.13 | 0.94 | 0.80 | |
| CHOWAN | 18.56 | 2.89 | 0.17 | 0.87 | 1.23 | |
| ALEXANDER | 16.81 | 2.48 | 0.12 | 0.88 | 0.74 | |
| FRANKLIN | 16.50 | 2.01 | 0.11 | 0.87 | 0.43 | |
| PAMLICO | 14.98 | 1.86 | 0.09 | 0.61 | 1.75 | |
| ANSON | 14.28 | 1.84 | 0.11 | 0.79 | 0.37 | |
| WASHINGTON | 12.83 | 1.78 | 0.10 | 0.68 | 0.57 | |
| CLAY | 12.43 | 1.42 | 0.07 | 0.50 | 1.44 | |
| NORTHAMPTON | 12.03 | 1.46 | 0.06 | 0.51 | 1.06 | |
| BERTIE | 10.85 | 1.16 | 0.05 | 0.56 | 0.65 | |
| PERQUIMANS | 8.23 | 1.04 | 0.04 | 0.34 | 0.97 | |
| HOKE | 7.98 | 1.03 | 0.06 | 0.43 | 0.13 | |
| CASWELL | 6.54 | 0.71 | 0.04 | 0.30 | 0.49 | |
| GATES | 5.14 | 0.46 | 0.02 | 0.29 | 0.21 | |
| GREENE | 4.47 | 0.46 | 0.03 | 0.24 | 0.16 | |
| TYRRELL | 3.62 | 0.37 | 0.02 | 0.16 | 0.37 | |
| JONES | 3.39 | 0.49 | 0.02 | 0.19 | 0.11 | |
| CAMDEN | 1.69 | 0.20 | 0.01 | 0.09 | 0.15 | |
| STATE TOTALS | \$16,510.74 | \$4,023.59 | 190.89 | \$814.98 | \$529.03 | |

C2008 TIA

Table C: Percent Distribution By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| Table C: Percent Distribution by County, 2007 | | | | | |
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| ALAMANCE | 0.85% | 0.57% | 0.69% | 0.96% | 0.49% |
| ALEXANDER | 0.10% | 0.06% | 0.06% | 0.11% | 0.14% |
| ALLEGHANY | 0.12% | 0.09% | 0.10% | 0.11% | 0.26% |
| ANSON | 0.09% | 0.05% | 0.06% | 0.10% | 0.07% |
| ASHE | 0.24% | 0.15% | 0.19% | 0.24% | 0.43% |
| AVERY | 0.55% | 0.55% | 0.64% | 0.55% | 0.79% |
| BEAUFORT | 0.39% | 0.22% | 0.24% | 0.38% | 0.78% |
| BERTIE | 0.07% | 0.03% | 0.03% | 0.07% | 0.12% |
| BLADEN | 0.19% | 0.09% | 0.10% | 0.21% | 0.18% |
| BRUNSWICK | 2.38% | 1.93% | 2.60% | 2.21% | 4.82% |
| BUNCOMBE | 4.30% | 4.09% | 4.90% | 4.32% | 4.29% |
| BURKE | 0.44% | 0.28% | 0.34% | 0.47% | 0.43% |
| CABARRUS | 1.67% | 1.63% | 1.83% | 1.88% | 0.86% |
| CALDWELL | 0.28% | 0.18% | 0.20% | 0.29% | 0.29% |
| CAMDEN | 0.01% | 0.00% | 0.01% | 0.01% | 0.03% |
| CARTERET | 1.63% | 1.27% | 1.66% | 1.47% | 3.29% |
| CASWELL | 0.04% | 0.02% | 0.02% | 0.04% | 0.09% |
| CATAWBA | 1.30% | 1.01% | 1.22% | 1.38% | 1.31% |
| CHATHAM | 0.15% | 0.08% | 0.09% | 0.17% | 0.09% |
| CHEROKEE | 0.22% | 0.14% | 0.18% | 0.20% | 0.42% |
| CHOWAN | 0.11% | 0.07% | 0.09% | 0.11% | 0.23% |
| CLAY | 0.08% | 0.04% | 0.04% | 0.06% | 0.27% |
| CLEVELAND | 0.53% | 0.32% | 0.37% | 0.60% | 0.30% |
| COLUMBUS | 0.27% | 0.14% | 0.16% | 0.30% | 0.25% |
| CRAVEN | 0.62% | 0.52% | 0.55% | 0.65% | 0.45% |
| CUMBERLAND | 2.24% | 1.86% | 2.10% | 2.34% | 1.54% |
| CURRITUCK | 0.73% | 0.58% | 0.80% | 0.62% | 1.12% |

Table C: Percent Distribution By County, 2007

2007 Impact of Travel on North Carolina**Table C: Percent Distribution by County, 2007 (Continued)**

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| DARE | 4.62% | 4.12% | 5.89% | 4.43% | 6.87% |
| DAVIDSON | 0.71% | 0.44% | 0.50% | 0.76% | 0.76% |
| DAVIE | 0.17% | 0.13% | 0.14% | 0.19% | 0.10% |
| DUPLIN | 0.20% | 0.10% | 0.11% | 0.22% | 0.20% |
| DURHAM | 3.23% | 2.84% | 3.81% | 3.41% | 3.07% |
| EDGECOMBE | 0.30% | 0.17% | 0.20% | 0.31% | 0.17% |
| FORSYTH | 3.63% | 2.65% | 3.11% | 4.11% | 2.23% |
| FRANKLIN | 0.10% | 0.05% | 0.06% | 0.11% | 0.08% |
| GASTON | 1.13% | 0.76% | 0.91% | 1.25% | 0.62% |
| GATES | 0.03% | 0.01% | 0.01% | 0.04% | 0.04% |
| GRAHAM | 0.15% | 0.11% | 0.15% | 0.14% | 0.32% |
| GRANVILLE | 0.24% | 0.13% | 0.16% | 0.26% | 0.22% |
| GREENE | 0.03% | 0.01% | 0.01% | 0.03% | 0.03% |
| GUILFORD | 6.56% | 6.89% | 6.83% | 6.63% | 4.96% |
| HALIFAX | 0.39% | 0.21% | 0.24% | 0.46% | 0.28% |
| HARNETT | 0.38% | 0.23% | 0.29% | 0.41% | 0.28% |
| HAYWOOD | 0.71% | 0.59% | 0.73% | 0.71% | 0.95% |
| HENDERSON | 1.21% | 0.93% | 1.09% | 1.08% | 1.76% |
| HERTFORD | 0.15% | 0.08% | 0.10% | 0.17% | 0.12% |
| HOKE | 0.05% | 0.03% | 0.03% | 0.05% | 0.02% |
| HYDE | 0.17% | 0.14% | 0.19% | 0.16% | 0.29% |
| IREDELL | 1.11% | 0.76% | 0.91% | 1.19% | 1.13% |
| JACKSON | 0.44% | 0.31% | 0.37% | 0.40% | 1.12% |
| JOHNSTON | 1.05% | 0.69% | 0.87% | 1.14% | 0.88% |
| JONES | 0.02% | 0.01% | 0.01% | 0.02% | 0.02% |
| LEE | 0.34% | 0.26% | 0.31% | 0.38% | 0.22% |
| LENOIR | 0.44% | 0.31% | 0.34% | 0.47% | 0.28% |

Table C: Percent Distribution By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| Table C: Percent Distribution by County, 2007 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| LINCOLN | 0.24% | 0.17% | 0.18% | 0.25% | 0.23% |
| MACON | 0.70% | 0.53% | 0.59% | 0.63% | 1.84% |
| MADISON | 0.18% | 0.15% | 0.18% | 0.19% | 0.28% |
| MARTIN | 0.16% | 0.11% | 0.13% | 0.17% | 0.14% |
| MCDOWELL | 0.23% | 0.15% | 0.19% | 0.24% | 0.28% |
| MECKLENBURG | 20.88% | 30.52% | 21.65% | 19.36% | 17.41% |
| MITCHELL | 0.12% | 0.08% | 0.09% | 0.10% | 0.17% |
| MONTGOMERY | 0.13% | 0.06% | 0.05% | 0.12% | 0.39% |
| MOORE | 2.11% | 2.07% | 2.73% | 2.16% | 2.09% |
| NASH | 1.32% | 1.11% | 1.51% | 1.36% | 1.15% |
| NEW HANOVER | 2.58% | 2.46% | 2.97% | 2.50% | 3.16% |
| NORTHAMPTON | 0.07% | 0.04% | 0.03% | 0.06% | 0.20% |
| ONSLOW | 0.97% | 0.78% | 0.82% | 0.98% | 1.10% |
| ORANGE | 0.89% | 0.71% | 0.91% | 0.96% | 0.58% |
| PAMLICO | 0.09% | 0.05% | 0.04% | 0.07% | 0.33% |
| PASQUOTANK | 0.29% | 0.19% | 0.25% | 0.31% | 0.21% |
| PENDER | 0.40% | 0.29% | 0.36% | 0.36% | 0.89% |
| PERQUIMANS | 0.05% | 0.03% | 0.02% | 0.04% | 0.18% |
| PERSON | 0.17% | 0.09% | 0.11% | 0.19% | 0.13% |
| PITT | 1.07% | 0.89% | 1.04% | 1.08% | 0.78% |
| POLK | 0.12% | 0.07% | 0.09% | 0.12% | 0.22% |
| RANDOLPH | 0.62% | 0.42% | 0.47% | 0.72% | 0.32% |
| RICHMOND | 0.25% | 0.20% | 0.24% | 0.26% | 0.16% |
| ROBESON | 0.70% | 0.45% | 0.59% | 0.77% | 0.41% |
| ROCKINGHAM | 0.37% | 0.26% | 0.31% | 0.39% | 0.30% |
| ROWAN | 0.72% | 0.51% | 0.63% | 0.74% | 0.74% |
| RUTHERFORD | 0.82% | 0.50% | 0.64% | 0.93% | 0.80% |

Table C: Percent Distribution By County, 2007

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| Table C: Percent Distribution by County, 2007 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| SAMPSON | 0.26% | 0.14% | 0.16% | 0.28% | 0.27% |
| SCOTLAND | 0.21% | 0.15% | 0.19% | 0.23% | 0.12% |
| STANLY | 0.40% | 0.23% | 0.27% | 0.45% | 0.40% |
| STOKES | 0.12% | 0.06% | 0.07% | 0.12% | 0.15% |
| SURRY | 0.50% | 0.32% | 0.37% | 0.54% | 0.36% |
| SWAIN | 1.52% | 1.87% | 1.75% | 1.77% | 1.06% |
| TRANSYLVANIA | 0.49% | 0.38% | 0.43% | 0.38% | 0.72% |
| TYRRELL | 0.02% | 0.01% | 0.01% | 0.02% | 0.07% |
| UNION | 0.57% | 0.38% | 0.46% | 0.61% | 0.34% |
| VANCE | 0.24% | 0.14% | 0.16% | 0.27% | 0.24% |
| WAKE | 8.96% | 12.08% | 9.75% | 8.44% | 8.00% |
| WARREN | 0.12% | 0.06% | 0.06% | 0.09% | 0.35% |
| WASHINGTON | 0.08% | 0.04% | 0.05% | 0.08% | 0.11% |
| WATAUGA | 1.16% | 1.08% | 1.35% | 1.15% | 1.48% |
| WAYNE | 0.68% | 0.40% | 0.47% | 0.81% | 0.35% |
| WILKES | 0.37% | 0.23% | 0.29% | 0.36% | 0.27% |
| WILSON | 0.53% | 0.34% | 0.41% | 0.59% | 0.33% |
| YADKIN | 0.18% | 0.13% | 0.18% | 0.19% | 0.15% |
| YANCEY | 0.16% | 0.12% | 0.13% | 0.15% | 0.38% |
| STATE TOTALS | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

C2008 TIA

Table D: Percent Change Over 2006

| 2007 Impact of Travel on North Carolina | | | | | |
|--|--------------|---------|------------|--------------------|--------------------|
| Table D: Percent Change Over 2006 | | | | | |
| County | Expenditures | Payroll | Employment | State Tax Receipts | Local Tax Receipts |
| ALAMANCE | 7.24% | 3.62% | 1.83% | 2.29% | 6.92% |
| ALEXANDER | 3.28% | -0.21% | -1.93% | -1.49% | 2.97% |
| ALLEGHANY | 8.25% | 4.60% | 2.79% | 3.25% | 7.93% |
| ANSON | 4.05% | 0.54% | -1.20% | -0.75% | 3.74% |
| ASHE | 4.65% | 1.12% | -0.63% | -0.18% | 4.34% |
| AVERY | 1.57% | -1.85% | -3.55% | -3.11% | 1.27% |
| BEAUFORT | 5.23% | 1.68% | -0.08% | 0.37% | 4.92% |
| BERTIE | 4.38% | 0.86% | -0.88% | -0.43% | 4.07% |
| BLADEN | 1.21% | -2.20% | -3.89% | -3.46% | 0.91% |
| BRUNSWICK | 6.61% | 3.01% | 1.23% | 1.69% | 6.29% |
| BUNCOMBE | 9.86% | 6.15% | 4.32% | 4.79% | 9.53% |
| BURKE | 2.92% | -0.55% | -2.27% | -1.83% | 2.62% |
| CABARRUS | 12.06% | 8.28% | 6.41% | 6.89% | 11.73% |
| CALDWELL | 6.65% | 3.05% | 1.27% | 1.73% | 6.33% |
| CAMDEN | 3.56% | 0.07% | -1.66% | -1.22% | 3.25% |
| CARTERET | 2.87% | -0.60% | -2.32% | -1.88% | 2.56% |
| CASWELL | 2.79% | -0.68% | -2.40% | -1.96% | 2.48% |
| CATAWBA | 3.55% | 0.06% | -1.67% | -1.23% | 3.25% |
| CHATHAM | 5.97% | 2.39% | 0.62% | 1.08% | 5.65% |
| CHEROKEE | 2.81% | -0.66% | -2.37% | -1.93% | 2.51% |
| CHOWAN | 5.55% | 1.99% | 0.23% | 0.68% | 5.24% |
| CLAY | 4.41% | 0.88% | -0.86% | -0.41% | 4.10% |
| CLEVELAND | 4.18% | 0.66% | -1.08% | -0.63% | 3.87% |
| COLUMBUS | 8.34% | 4.69% | 2.88% | 3.34% | 8.02% |
| CRAVEN | 8.01% | 4.36% | 2.56% | 3.02% | 7.69% |
| CUMBERLAND | 3.60% | 0.11% | -1.62% | -1.18% | 3.30% |
| CURRITUCK | -0.20% | -3.57% | -5.24% | -4.81% | -0.50% |

Table D: Percent Change Over 2006

**2007 Impact of Travel on North Carolina
Table D: Percent Change Over 2006 (Continued)**

| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
|---------------|---------------------|----------------|-------------------|---------------------------|---------------------------|
| DARE | 8.60% | 4.94% | 3.12% | 3.59% | 8.28% |
| DAVIDSON | 3.59% | 0.09% | -1.64% | -1.19% | 3.28% |
| DAVIE | 4.15% | 0.63% | -1.11% | -0.66% | 3.84% |
| DUPLIN | 0.46% | -2.93% | -4.61% | -4.18% | 0.16% |
| DURHAM | 6.35% | 2.77% | 0.99% | 1.45% | 6.04% |
| EDGECOMBE | 0.92% | -2.48% | -4.17% | -3.74% | 0.62% |
| FORSYTH | 7.55% | 3.92% | 2.12% | 2.58% | 7.23% |
| FRANKLIN | 3.67% | 0.17% | -1.56% | -1.12% | 3.36% |
| GASTON | 6.84% | 3.23% | 1.45% | 1.91% | 6.52% |
| GATES | -0.49% | -3.85% | -5.51% | -5.08% | -0.78% |
| GRAHAM | 2.10% | -1.35% | -3.05% | -2.62% | 1.79% |
| GRANVILLE | 10.57% | 6.84% | 4.99% | 5.47% | 10.24% |
| GREENE | 1.91% | -1.53% | -3.23% | -2.79% | 1.61% |
| GUILFORD | 5.68% | 2.11% | 0.35% | 0.80% | 5.36% |
| HALIFAX | 7.39% | 3.77% | 1.98% | 2.44% | 7.08% |
| HARNETT | 9.89% | 6.18% | 4.35% | 4.82% | 9.56% |
| HAYWOOD | 5.03% | 1.48% | -0.27% | 0.18% | 4.72% |
| HENDERSON | 5.61% | 2.05% | 0.28% | 0.74% | 5.30% |
| HERTFORD | 4.19% | 0.67% | -1.07% | -0.62% | 3.88% |
| HOKE | 2.79% | -0.68% | -2.40% | -1.96% | 2.48% |
| HYDE | -4.10% | -7.34% | -8.94% | -8.53% | -4.39% |
| IREDELL | 5.88% | 2.30% | 0.54% | 0.99% | 5.56% |
| JACKSON | 6.45% | 2.86% | 1.08% | 1.54% | 6.13% |
| JOHNSTON | 8.31% | 4.66% | 2.85% | 3.31% | 7.99% |
| JONES | 1.04% | -2.37% | -4.06% | -3.62% | 0.74% |
| LEE | -0.35% | -3.71% | -5.37% | -4.94% | -0.64% |
| LENOIR | 7.13% | 3.52% | 1.73% | 2.19% | 6.81% |

Table D: Percent Change Over 2006

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| Table D: Percent Change Over 2006 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| LINCOLN | 4.11% | 0.59% | -1.14% | -0.70% | 3.80% |
| MACON | 3.84% | 0.34% | -1.40% | -0.95% | 3.53% |
| MADISON | 11.06% | 7.31% | 5.46% | 5.93% | 10.73% |
| MARTIN | 2.64% | -0.82% | -2.54% | -2.10% | 2.33% |
| MCDOWELL | 4.32% | 0.80% | -0.94% | -0.50% | 4.01% |
| MECKLENBURG | 9.49% | 5.80% | 3.97% | 4.44% | 9.17% |
| MITCHELL | 6.71% | 3.11% | 1.33% | 1.79% | 6.40% |
| MONTGOMERY | 0.72% | -2.68% | -4.36% | -3.93% | 0.42% |
| MOORE | 0.84% | -2.56% | -4.25% | -3.82% | 0.54% |
| NASH | 12.70% | 8.89% | 7.01% | 7.50% | 12.36% |
| NEW HANOVER | 9.73% | 6.02% | 4.19% | 4.66% | 9.40% |
| NORTHAMPTON | 2.45% | -1.01% | -2.72% | -2.28% | 2.15% |
| ONSLOW | 7.42% | 3.79% | 2.00% | 2.46% | 7.10% |
| ORANGE | 7.22% | 3.60% | 1.81% | 1.53% | 5.86% |
| PAMLICO | 4.33% | 0.81% | -0.94% | -0.49% | 4.02% |
| PASQUOTANK | 8.24% | 4.58% | 2.78% | 3.24% | 7.91% |
| PENDER | -0.88% | -4.23% | -5.88% | -5.46% | -1.18% |
| PERQUIMANS | 1.72% | -1.71% | -3.41% | -2.98% | 1.42% |
| PERSON | 9.45% | 5.75% | 3.93% | 4.40% | 9.12% |
| PITT | 4.68% | 1.15% | -0.60% | -0.15% | 4.37% |
| POLK | 9.63% | 5.93% | 4.10% | 4.57% | 9.30% |
| RANDOLPH | 4.06% | 0.55% | -1.19% | -0.75% | 3.75% |
| RICHMOND | 6.98% | 3.37% | 1.59% | 2.05% | 6.67% |
| ROBESON | 9.48% | 5.78% | 3.95% | 4.42% | 9.15% |
| ROCKINGHAM | 3.11% | -0.37% | -2.09% | -1.65% | 2.81% |
| ROWAN | 5.47% | 1.91% | 0.15% | 0.60% | 5.16% |
| RUTHERFORD | 2.58% | -0.88% | -2.59% | -2.15% | 2.28% |

Table D: Percent Change Over 2006

| 2007 Impact of Travel on North Carolina | | | | | |
|--|---------------------|----------------|-------------------|---------------------------|---------------------------|
| Table D: Percent Change Over 2006 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures</u> | <u>Payroll</u> | <u>Employment</u> | <u>State Tax Receipts</u> | <u>Local Tax Receipts</u> |
| SAMPSON | 6.11% | 2.53% | 0.75% | 1.21% | 5.79% |
| SCOTLAND | 3.85% | 0.35% | -1.39% | -0.94% | 3.54% |
| STANLY | 7.21% | 3.60% | 1.81% | 2.27% | 6.90% |
| STOKES | 5.17% | 1.62% | -0.13% | 0.32% | 4.86% |
| SURRY | 6.91% | 3.30% | 1.52% | 1.98% | 6.59% |
| SWAIN | 4.22% | 0.70% | -1.04% | -0.59% | 3.91% |
| TRANSYLVANIA | 5.95% | 2.37% | 0.60% | 1.06% | 5.63% |
| TYRRELL | -0.51% | -3.87% | -5.53% | -5.10% | -0.81% |
| UNION | 12.15% | 8.37% | 6.50% | 6.98% | 11.82% |
| VANCE | 4.26% | 0.74% | -1.00% | -0.55% | 3.95% |
| WAKE | 10.70% | 6.96% | 5.11% | 5.59% | 10.37% |
| WARREN | 4.79% | 1.25% | -0.50% | -0.05% | 4.47% |
| WASHINGTON | 6.44% | 2.85% | 1.07% | 1.52% | 6.12% |
| WATAUGA | 6.70% | 3.10% | 1.32% | 1.78% | 6.39% |
| WAYNE | 4.04% | 0.53% | -1.21% | -0.76% | 3.73% |
| WILKES | 3.32% | -0.17% | -1.89% | -1.45% | 3.01% |
| WILSON | 7.60% | 3.97% | 2.17% | 2.64% | 7.28% |
| YADKIN | 0.75% | -2.65% | -4.33% | -3.90% | 0.45% |
| YANCEY | 2.60% | -0.86% | -2.58% | -2.14% | 2.29% |
| STATE TOTALS | 7.24% | 4.11% | 1.97% | 2.24% | 6.57% |

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Table E: Alphabetical By County, 2006

| 2006 Impact of Travel on North Carolina | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table E: Alphabetical by County, 2006 | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| ALAMANCE | \$131.33 | \$22.19 | 1.29 | \$7.67 | \$2.43 |
| ALEXANDER | 16.27 | 2.49 | 0.12 | 0.89 | 0.72 |
| ALLEGHANY | 17.95 | 3.49 | 0.18 | 0.88 | 1.25 |
| ANSON | 13.72 | 1.83 | 0.11 | 0.79 | 0.36 |
| ASHE | 38.17 | 6.04 | 0.37 | 1.99 | 2.19 |
| AVERY | 89.31 | 22.48 | 1.27 | 4.64 | 4.11 |
| BEAUFORT | 61.74 | 8.65 | 0.45 | 3.12 | 3.91 |
| BERTIE | 10.39 | 1.15 | 0.05 | 0.57 | 0.62 |
| BLADEN | 30.24 | 3.55 | 0.20 | 1.77 | 0.93 |
| BRUNSWICK | 367.87 | 75.41 | 4.91 | 17.69 | 23.97 |
| BUNCOMBE | 645.71 | 154.85 | 8.97 | 33.63 | 20.74 |
| BURKE | 71.14 | 11.29 | 0.67 | 3.92 | 2.21 |
| CABARRUS | 245.77 | 60.56 | 3.29 | 14.36 | 4.08 |
| CALDWELL | 43.64 | 7.02 | 0.37 | 2.35 | 1.45 |
| CAMDEN | 1.63 | 0.20 | 0.01 | 0.09 | 0.15 |
| CARTERET | 262.05 | 51.26 | 3.25 | 12.22 | 16.96 |
| CASWELL | 6.36 | 0.71 | 0.04 | 0.31 | 0.48 |
| CATAWBA | 207.79 | 40.80 | 2.37 | 11.36 | 6.71 |
| CHATHAM | 23.43 | 3.08 | 0.17 | 1.38 | 0.45 |
| CHEROKEE | 34.63 | 5.81 | 0.35 | 1.69 | 2.19 |
| CHOWAN | 17.59 | 2.83 | 0.17 | 0.86 | 1.17 |
| CLAY | 11.90 | 1.41 | 0.07 | 0.51 | 1.38 |
| CLEVELAND | 83.70 | 12.91 | 0.72 | 4.89 | 1.54 |
| COLUMBUS | 41.73 | 5.39 | 0.30 | 2.38 | 1.22 |
| CRAVEN | 94.16 | 19.88 | 1.02 | 5.12 | 2.20 |
| CUMBERLAND | 356.48 | 74.80 | 4.07 | 19.33 | 7.87 |
| CURRITUCK | 120.25 | 24.40 | 1.60 | 5.34 | 5.94 |

Table E: Alphabetical By County, 2006

| 2006 Impact of Travel on North Carolina | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|
| Table E: Alphabetical by County, 2006 (Continued) | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> |
| DARE | 702.25 | 157.81 | 10.91 | 34.88 | 33.56 |
| DAVIDSON | 112.69 | 17.63 | 0.96 | 6.28 | 3.87 |
| DAVIE | 27.71 | 5.29 | 0.27 | 1.54 | 0.52 |
| DUPLIN | 33.14 | 4.14 | 0.22 | 1.91 | 1.04 |
| DURHAM | 501.90 | 111.26 | 7.20 | 27.43 | 15.32 |
| EDGECOMBE | 48.54 | 7.21 | 0.39 | 2.66 | 0.88 |
| FORSYTH | 556.73 | 102.72 | 5.81 | 32.62 | 10.99 |
| FRANKLIN | 15.92 | 2.00 | 0.11 | 0.88 | 0.42 |
| GASTON | 175.24 | 29.80 | 1.71 | 10.00 | 3.09 |
| GATES | 5.16 | 0.48 | 0.02 | 0.31 | 0.21 |
| GRAHAM | 24.03 | 4.55 | 0.30 | 1.16 | 1.66 |
| GRANVILLE | 35.32 | 4.81 | 0.28 | 2.03 | 1.05 |
| GREENE | 4.38 | 0.47 | 0.03 | 0.24 | 0.16 |
| GUILFORD | 1,025.51 | 271.69 | 12.99 | 53.61 | 24.88 |
| HALIFAX | 60.34 | 8.07 | 0.46 | 3.65 | 1.40 |
| HARNETT | 57.04 | 8.88 | 0.53 | 3.17 | 1.37 |
| HAYWOOD | 111.06 | 23.48 | 1.40 | 5.82 | 4.78 |
| HENDERSON | 189.23 | 36.83 | 2.07 | 8.73 | 8.86 |
| HERTFORD | 23.54 | 3.29 | 0.19 | 1.37 | 0.61 |
| HOKE | 7.76 | 1.03 | 0.07 | 0.43 | 0.13 |
| HYDE | 28.46 | 5.93 | 0.41 | 1.39 | 1.60 |
| IREDELL | 172.69 | 29.77 | 1.73 | 9.60 | 5.66 |
| JACKSON | 68.21 | 12.23 | 0.69 | 3.18 | 5.60 |
| JOHNSTON | 160.77 | 26.57 | 1.61 | 9.01 | 4.32 |
| JONES | 3.36 | 0.50 | 0.02 | 0.20 | 0.11 |
| LEE | 57.00 | 10.95 | 0.63 | 3.25 | 1.17 |
| LENOIR | 67.24 | 12.22 | 0.64 | 3.72 | 1.38 |

Table E: Alphabetical By County, 2006

| 2006 Impact of Travel on North Carolina | | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table E: Alphabetical by County, 2006 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| LINCOLN | 37.95 | 6.63 | 0.35 | 2.09 | 1.19 | |
| MACON | 111.16 | 21.07 | 1.15 | 5.18 | 9.41 | |
| MADISON | 27.30 | 5.76 | 0.32 | 1.43 | 1.32 | |
| MARTIN | 26.54 | 4.28 | 0.25 | 1.45 | 0.70 | |
| MCDOWELL | 37.00 | 6.02 | 0.36 | 1.95 | 1.42 | |
| MECKLENBURG | 3,148.51 | 1,160.72 | 39.75 | 151.04 | 84.36 | |
| MITCHELL | 18.62 | 3.08 | 0.17 | 0.83 | 0.84 | |
| MONTGOMERY | 20.96 | 2.30 | 0.11 | 0.99 | 2.05 | |
| MOORE | 346.17 | 85.36 | 5.45 | 18.26 | 11.02 | |
| NASH | 193.76 | 41.14 | 2.68 | 10.31 | 5.43 | |
| NEW HANOVER | 388.31 | 93.54 | 5.44 | 19.45 | 15.26 | |
| NORTHAMPTON | 11.75 | 1.48 | 0.06 | 0.53 | 1.04 | |
| ONSLOW | 148.50 | 30.28 | 1.53 | 7.82 | 5.43 | |
| ORANGE | 137.61 | 27.62 | 1.71 | 7.68 | 2.88 | |
| PAMLICO | 14.36 | 1.85 | 0.09 | 0.61 | 1.68 | |
| PASQUOTANK | 43.93 | 7.33 | 0.46 | 2.44 | 1.04 | |
| PENDER | 66.88 | 12.30 | 0.73 | 3.14 | 4.79 | |
| PERQUIMANS | 8.09 | 1.06 | 0.04 | 0.35 | 0.96 | |
| PERSON | 26.33 | 3.57 | 0.21 | 1.52 | 0.63 | |
| PITT | 168.76 | 35.21 | 2.00 | 8.83 | 3.97 | |
| POLK | 17.88 | 2.80 | 0.17 | 0.93 | 1.07 | |
| RANDOLPH | 98.69 | 16.68 | 0.91 | 5.88 | 1.63 | |
| RICHMOND | 39.35 | 7.63 | 0.44 | 2.11 | 0.78 | |
| ROBESON | 105.40 | 17.10 | 1.08 | 6.02 | 2.01 | |
| ROCKINGHAM | 60.04 | 10.34 | 0.60 | 3.20 | 1.53 | |
| ROWAN | 112.14 | 20.01 | 1.20 | 6.02 | 3.71 | |
| RUTHERFORD | 131.66 | 20.44 | 1.25 | 7.78 | 4.15 | |

Table E: Alphabetical By County, 2006

| 2006 Impact of Travel on North Carolina | | | | | | |
|--|---------------------------------------|----------------------------------|-----------------------------------|---|---|--|
| Table E: Alphabetical by County, 2006 (Continued) | | | | | | |
| <u>County</u> | <u>Expenditures (\$ Millions)</u> | <u>Payroll (\$ Millions)</u> | <u>Employment (Thousands)</u> | <u>State Tax Receipts (\$ Millions)</u> | <u>Local Tax Receipts (\$ Millions)</u> | |
| SAMPSON | 40.47 | 5.69 | 0.30 | 2.24 | 1.37 | |
| SCOTLAND | 33.69 | 5.99 | 0.37 | 1.86 | 0.63 | |
| STANLY | 62.27 | 8.96 | 0.51 | 3.57 | 1.99 | |
| STOKES | 18.46 | 2.55 | 0.13 | 0.94 | 0.76 | |
| SURRY | 77.93 | 12.30 | 0.69 | 4.34 | 1.76 | |
| SWAIN | 240.86 | 74.62 | 3.37 | 14.53 | 5.38 | |
| TRANSYLVANIA | 75.64 | 14.93 | 0.82 | 3.04 | 3.63 | |
| TYRRELL | 3.64 | 0.38 | 0.02 | 0.17 | 0.37 | |
| UNION | 83.19 | 14.10 | 0.83 | 4.68 | 1.59 | |
| VANCE | 38.59 | 5.75 | 0.31 | 2.24 | 1.23 | |
| WAKE | 1,337.14 | 454.39 | 17.70 | 65.18 | 38.36 | |
| WARREN | 19.41 | 2.56 | 0.12 | 0.73 | 1.76 | |
| WASHINGTON | 12.05 | 1.73 | 0.10 | 0.67 | 0.54 | |
| WATAUGA | 179.14 | 42.25 | 2.55 | 9.21 | 7.35 | |
| WAYNE | 108.64 | 15.86 | 0.91 | 6.62 | 1.76 | |
| WILKES | 59.44 | 9.41 | 0.56 | 2.94 | 1.41 | |
| WILSON | 80.84 | 13.16 | 0.77 | 4.71 | 1.63 | |
| YADKIN | 29.74 | 5.53 | 0.36 | 1.61 | 0.77 | |
| YANCEY | 26.51 | 4.83 | 0.25 | 1.22 | 1.99 | |
| STATE TOTALS | \$15,395.54 | \$3,864.65 | 187.20 | \$797.17 | \$496.44 | |

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APPENDICES

Appendix A: Travel Economic Impact Model

Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at TIA (formerly known as the U.S. Travel Data Center) 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 16 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.

A *travel expenditure* is assumed to take place whenever a 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. Sixteen (16) 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 16 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 TIA, 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 16 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 Massachusetts 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, TIA'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. Also included are expenditures on "other transportation" as indicated in the TravelScope.

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 16 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, TIA 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, TIA 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, TIA's Travel Economic Impact Model, tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of sixteen (16) 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 | | | |
| <i>Hotels and Motels</i> | 701 | <i>Traveler Accommodation</i> | 7211 |
| <i>Recreational Vehicle Parks & Campsites</i> | 703 | <i>Recreational Vehicle Parks & Campgrounds</i> | 7212 |
| Auto Transportation | | | |
| <i>Passenger Car Rental</i> | 7514 | <i>Passenger Car Rental</i> | 532111 |
| <i>Gasoline Service Stations</i> | 554 | <i>Gasoline Stations with Convenience Stores; Other Gasoline Stations</i> | 447110; 447190 |
| <i>Automotive Dealers</i> | 55 (excl. 554) | <i>Motor Vehicle & Parts Dealers</i> | 4411; 4412; 4413 |
| Entertainment and Recreation | | | |
| <i>Amusement and Recreational Services</i> | 79 | <i>Amusement, Gambling & Recreation Industries</i> | 713 |
| | | <i>Performing Arts, Spectator Sports & Related Industries</i> | 711 |
| <i>Museums, Art Galleries, Botanical and Zoological Gardens</i> | 84 | <i>Museums, Historical Sites & Similar Institutions</i> | 712 |
| Food | | | |
| <i>Eating & Drinking Places (Alcoholic Beverages)</i> | 581 | <i>Foodservices & Drinking Places</i> | 7221; 7222; 7224 |
| <i>Grocery Stores</i> | 541 | <i>Food and Beverage stores</i> | 4451; 4452; 4453 |
| Public Transportation | | | |
| <i>Air Transportation</i> | 45 | <i>Passenger Air Transportation; Airport Support Activities</i> | 481; 4881 |
| <i>Rail - Local & Suburban Transit</i> | 4111 | <i>Rail Transportation</i> | 485112 |
| <i>Interurban & Rural Bus Carriers</i> | 413 | <i>Interurban & Rural Bus Transportation</i> | 4852 |
| <i>Charter Bus/Interstate</i> | 4142 | <i>Charter Bus (interstate/interurban)</i> | 4855102 |
| <i>Taxi & Limousine Services</i> | 412 | <i>Taxi & Limousine Services</i> | 4853 |
| <i>Water Transportation of Passengers</i> | 448 | <i>Water Passenger Transportation</i> | 483112; 483114; 483212 |
| -- | -- | <i>Scenic & Sightseeing Transportation (New industry-includes parts of SICs 4119,4489,4522,4789,7999)</i> | 487 |
| Retail | | | |
| <i>General Merchandise Stores</i> | 53 | <i>General Merchandise Stores</i> | 452 |
| <i>Miscellaneous Retail Stores</i> | 59 | <i>Other Retail Stores</i> | 453; 44611; 4483; 45111; 45112; 45121 |
| Travel Arrangement | | | |
| <i>Travel Arrangement</i> | 472 | <i>Travel Arrangement & Reservation Services (includes travel agencies and tour operators)</i> | 5615 |

Appendix D: Sources of Data

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

Organizations

Air Transport Association
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
Travel Industry Association