

**The Economic Impact
Of Travel On
North Carolina Counties
2016**

A Study Prepared for the
**Visit North Carolina - A Part of the
Economic Development Partnership of North Carolina**
by the
U.S. Travel Association
Washington, D.C.
October 2017

PREFACE

This study was conducted by the Research Department of the U.S. Travel Association for **Visit North Carolina - a part of the Economic Development Partnership of North Carolina**. The study provides preliminary 2016 and 2015 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 2016 and 2015 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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Washington, D.C.
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INTRODUCTION

This report presents preliminary 2016 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, 2015 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 2016 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 \$23.8 billion in North Carolina during 2016, up 4.2 percent from 2015.
- Domestic and international travelers' expenditures directly generated 228,500 jobs in 2016, up 3.4 percent from 2015. These jobs composed 5.3 percent of total state non-agricultural employment in 2016.
- Domestic and international travelers' expenditures generated \$5.8 billion in payroll income for North Carolina during 2016. This represented an increase of 4.9 percent from 2015.
- On average, every \$104,249 spent by domestic and international travelers in North Carolina during 2016 supported one job.
- Domestic and international travelers' expenditures in North Carolina directly generated more than \$3.7 billion in tax revenue for federal, state and local governments in 2016, up 4.4 percent from 2015.
- In 2016, Mecklenburg County received \$5.2 billion in domestic travelers' expenditures to lead all of North Carolina's 100 counties. Wake County ranked second with \$2.2 billion, followed by Guilford County with \$1.3 billion.
- Forty-one of North Carolina's 100 counties received over \$100 million in domestic travelers' expenditures in 2016.
- Thirty-eight counties in North Carolina indicated one thousand or more jobs were directly supported by domestic travelers during 2016.

NATIONAL SUMMARY 2016

The U.S. economy continued to grow at a lower rate in 2016. Following a 2.9 percent and 2.6 percent increase in 2015 and 2014 respectively, the real GDP grew 1.5 percent in 2016. Economic activity in 2016, however, signaled a return of strong economic fundamentals.

The 2016 U.S. economy synchronized of business investment with growing consumer spending, adding much-needed stability after consecutive years of volatility in fixed nonresidential investment. Consumer spending remained strong throughout the year after a timid first quarter, increasing at 2.7 percent. Business investment faltered in the first quarter to start 2016, but regained its momentum to post consecutive quarters of at least 3.0 percent growth. Inventory investment also increased in the fourth quarter, contributing positively to GDP growth by over one percentage point for the first time since the first quarter of 2015.

At the same time, the U.S. economy was still facing large trade headwinds: exports on the whole had a volatile year but only increased at 0.4 percent whereas imports increased 5.0 percent. This could partly explain why business investment was lacking despite strong consumer spending numbers. Government spending also remained meager, increasing only 0.8 percent over the course of 2016.

The economy's strong fundamentals in the final quarter of 2016 were supported by a healthy and fully recovered labor market. Having recently surpassed its pre-2007-2009 recession peak of 138 million added jobs, the U.S. economy added 2.2 million jobs in 2016. Though it grew relatively slower than in 2014 and 2015, 2016 employment gains brought the economy closer to full employment, driving the unemployment rate to under five percent, and locking in recent gains for personal income and outlays.

Consequently, the Consumer Price Index (CPI), one measure of price levels, increased to 1.3 percent in 2016, up from a flat 2015. Excluding food and volatile energy prices (of which the latter has been at historic lows, driving down CPI), core CPI increased by 2.2 percent, the largest increase in core inflation since 2008. This increase in core inflation, as well as the healthy labor market, essentially drove the Federal Reserve to raise benchmark interest rates for the first time in nine years. Driven by historically low gasoline prices, U.S. Travel Association's Travel Price Index (TPI), on the other hand, remained flat for 2016, increasing by just 0.3 percent.

Moving forward to 2017, the U.S. economy endured a slow start in the first two quarters of 2017, expanding at 1.2 percent and 2.6 percent respectively over the first two quarters. Consumer spending was off to a slow start in 2017, increasing at 1.7 percent in the first quarter, while total investment and government spending both decreased 0.6 percent seasonally adjusted annualized rate (SAAR). The investment drop was due solely to a decrease in inventories, which slashed 1.5 percentage point from real GDP growth; business investment remained strong, growing 7.2 percent in the first quarter. The second quarter oversaw a modest rebound in consumer spending (2.8 percent SAAR growth) and investment (2.0 percent growth)

The U.S. employment situation continued to improve over the first seven months of 2017: average nonfarm employment increased by 1.5 percent, or (2.2 million jobs) compared to the first seven months of 2016. During the same period, the travel industry directly added 9,500 jobs per month over the first seven months of 2017 (66,800 jobs). Unemployment continued to decline, reaching a 16-year low at 4.3 percent over 2016.

Consumer prices, on the other hand, increased 1.7 percent for the 12-months ending July 2017. Over the first seven months of 2017, prices increased on average 2.1 percent compared to the first seven months in 2016. The TPI also increased by a 2.2 percent average rate for the first seven months of 2017 compared to the first seven months of 2016.

Table 1: Overall U.S. Economic Indicators, 2014-2016

<u>Sector</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Nominal gross domestic product (\$Billions)	17,427.6	18,120.7	18,624.5
Real gross domestic product (\$Billions) *	16,013.3	16,471.5	16,716.2
Real disposable personal income (\$Billions) *	11,939.2	12,436.0	12,608.8
Real personal consumption expenditures (\$Billions) *	10,868.4	11,264.3	11,572.1
Consumer price index**	236.7	237.0	240.0
Travel Price Index**	279.6	272.4	273.1
Nonfarm payroll employment (Millions)	139.0	141.8	144.3
Unemployment rate (%)	6.2	5.3	4.9
Percentage change from previous year			
Nominal gross domestic product	4.4%	4.0%	2.8%
Real gross domestic product	2.6%	2.9%	1.5%
Real disposable personal income	3.6%	4.2%	1.4%
Real personal consumption expenditures	2.9%	3.6%	2.7%
Consumer price index	1.6%	0.1%	1.3%
Travel Price Index	1.5%	-2.6%	0.3%
Non-farm payroll employment	1.9%	2.1%	1.7%

Source: BEA, BLS, U.S. Travel Association

* In chained 2009 dollars

** 1982-84=100

U.S. Travel Volume in 2016

U.S. domestic travel, including leisure and business travel, increased by 1.3 percent to a total of 2.2 billion person-trips in 2016. 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 leisure travel, which includes visits to friends and relatives as well as trips taken for outdoor recreation and entertainment purposes, increased 1.7 percent in 2016 to 1.7 billion person-trips and is forecasted to increase 1.8 percent in 2017. Leisure travel accounted for 79.2 percent of all U.S. domestic travel in 2016. Domestic business travel decreased by 0.2 percent in 2016 to 458.9 million person-trips and is expected to increase 1.6 percent in 2017.

International inbound travelers, including overnight visitors from Canada, Mexico and overseas, made 75.6 million visits to the United States in 2016. Overseas visitor arrivals to the U.S. (from all countries except Canada and Mexico) reached 37.6 million in 2016 and accounted for nearly half of total international arrivals to the United States, according to U.S. Department of Commerce. Canadian overnight arrivals to the U.S decreased from 20.7 million in 2015 to 17.3 million in 2016, while Mexican overnight arrivals increased from 18.4 million in 2015 to 18.7 million in 2016.

Travel Expenditures in 2016

Total domestic and international travelers spending in the U.S. increased 2.1 percent, growing from \$970 billion in 2015 to \$990 billion in 2016, not adjusted for inflation (excluding international airfare payments to the U.S. airlines). After a slight lull, the U.S. Travel Association expects total domestic and international traveler expenditures to pick up to 3.1 percent growth in 2017.

Domestic travel expenditures grew 2.9 percent from 2015 to \$837 billion in 2016. International travelers, on the other hand, spent \$154 billion in the U.S. in 2016, a decrease of 2.1 percent¹ from 2015. It should be noted here that this traveler spending excludes international airfare payments to U.S. airlines, as well as international visitors' expenses on education, health care and expenditures by cross-border day-trip visitors and seasonal workers. International traveler spending is expected to increase 0.9 percent in 2017.

International airfare receipts are total passenger fares paid by international residents on U.S. flag air carriers. In 2016, international airfare receipts totaled \$38.8 billion, down 7.6 percent from 2015. In the first six months of 2017, international airfare receipts increased 1.9 percent against the first six months of 2016.

Leisure traveler spending totaled \$683.1 billion in 2016, a 2.4 percent increase from 2015, accounting for 69.0 percent of all traveler expenditures. Business traveler spending increased 1.4 percent over 2015 to \$307.2 billion in 2016, 31.0 percent of all traveler expenditures.

¹ Reflects Department of Commerce data issued in June and does not include any revisions made in July.

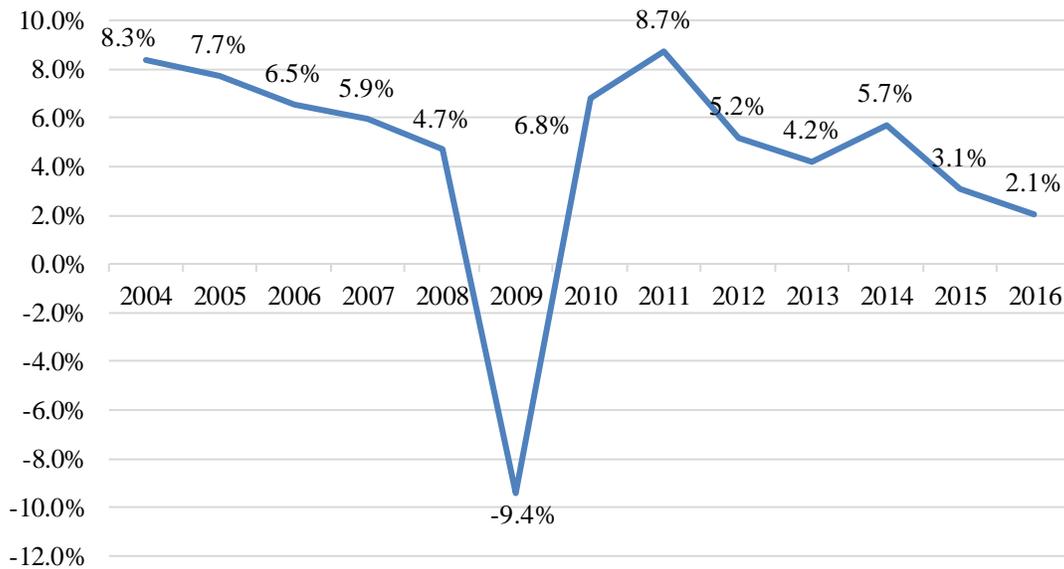
Table 2: Travel Expenditures - U.S. Nationwide

Category	2015 Spending (\$Billions)			2016 Spending (\$Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$164.2	\$17.6	\$181.7	\$167.3	\$17.6	\$184.8
Auto Transportation	146.4	1.9	148.3	139.4	1.9	141.3
Lodging	154.5	47.1	201.7	163.8	47.0	210.8
Foodservice	205.8	33.6	239.3	215.9	32.6	248.5
Entertainment & Recreation	83.8	12.5	96.4	88.1	12.0	100.1
General Retail Trade	58.7	44.3	103.0	62.2	42.7	104.8
Total	\$813.4	\$157.0	\$970.4	\$836.6	\$153.7	\$990.3

Source: U.S. Travel Association

* Excludes international passenger fare payments.

**Changes of Direct Travel Expenditures*
in the U.S., 2004-2016**



Source: U.S. Travel Association.

*Excludes international passenger fare payments.

Travel Employment in 2016

The year 2016 marked a turning point for the U.S. labor economy, wherein it transitioned from “recovered” to “healthy.” After making a full recovery from the 2007-2009 recession in February 2015, the economy built on its past gains, reaching a new high of 144.3 million nonfarm jobs, as measured by the Labor Department. In addition to creating 2.5 million jobs, a 1.7 percent increase from 2015, the annual average unemployment rate reached a post-recession low of 4.9 percent.

After peaking at 9.6 percent in 2010, the unemployment rate fell to an average monthly rate of 5.3 percent in 2016, starting at 5.7 percent in January and ending at 5.0 percent in December. The unemployment rate fell to 4.9 percent in January and February 2017, but returned to 5.0 percent in April, still above the 4.4 percent pre-recession low.

American service industries, of which the travel industry is a part, played a major role in the post-recession jobs recovery, accounting for 85.8 percent of the jobs recovered from 2010 to 2016. The travel industry joined healthcare; administrative services; accommodation and foodservices; and retail trade as one of the leading growth industries in terms of overall jobs created from 2010 to 2016. Travel accounted for 8.8 percent of nonfarm jobs created from 2010 to 2016, despite holding a 6 percent share of all nonfarm jobs in 2016.

In 2016, traveler spending directly supported nearly 8.6 million U.S. jobs, including both full-time and seasonal/part-time positions, up 2.4 percent from 2015. This increase translated into over 200,000 jobs added to the U.S. economy, accounting for 8.2 percent of total non-farm job growth since 2015.

These 8.6 million travel-generated jobs are a vital part of the U.S. economy. Without these jobs, the 2016 national unemployment rate of 4.9 percent would more than double to 10.1 percent of the civilian labor force.

Table 3: Travel Generated Employment - U.S. Nationwide

Category	2015 Employment (Thousands)			2016 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	928.5	75.7	1,004.2	966.6	76.7	1,043.3
Auto Transportation	282.8	2.4	285.1	294.5	2.4	296.8
Lodging	1,282.4	285.2	1,567.6	1,309.3	271.5	1,580.8
Foodservice	2,921.1	466.1	3,387.2	3,048.9	444.9	3,493.7
Entertainment & Recreation	1,181.9	263.1	1,445.0	1,216.7	242.1	1,458.8
General Retail Trade	354.7	179.2	533.9	371.6	170.2	541.9
Travel Planning	172.7		172.7	182.2		182.2
Total	7,124.1	1,271.8	8,395.9	7,389.7	1,207.8	8,597.5

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

U.S. Travel Trends, 2010-2019

Table 4: U.S. Travel Forecasts

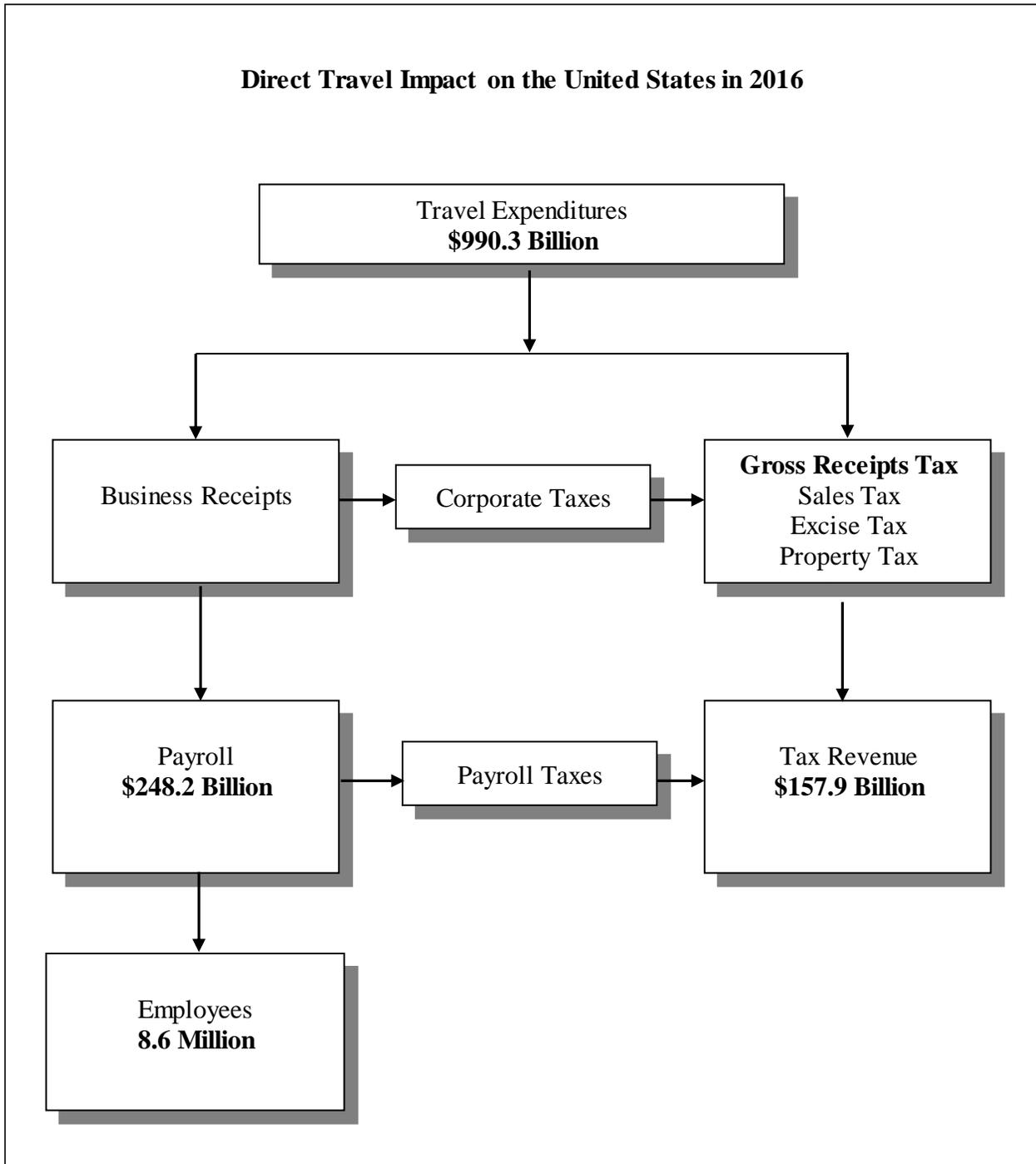
	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>
Real GDP (\$Billions)	14,783.80	15,020.60	15,354.60	15,612.20	15,982.30	16,397.20	18,500.80	19,331.90	20,253.20	21,110.0
Unemployment Rate (%)	9.6	8.9	8.1	7.4	7.4	5.3	4.9	4.6	4.7	4.6
Consumer Price Index*	214.6	218.1	224.9	229.6	233.0	236.7	237.1	240.0	245.5	250.7
Travel Price Index	241.5	250.7	266.9	273.0	275.6	279.6	272.4	273.1	282.0	292.0
Total Travel Expenditures in U.S. (\$Billions)	750.8	815.3	854.7	890.7	941.6	970.4	990.3	1,020.9	1,062.9	1,106.4
U.S. Residents	643.9	696.7	728.0	751.2	792.4	813.4	836.6	865.9	901.3	937.0
International Visitors**	106.9	118.6	126.7	139.5	149.2	157.0	153.7	155.1	161.6	169.4
Total International Visitors to the U.S. (Millions)	60.0	62.8	66.7	70.0	75.0	77.5	75.6	75.5	76.9	80.0
Overseas Arrivals to the U.S. (Millions)	26.4	27.9	29.8	32.0	34.9	38.4	37.6	37.7	38.7	40.4
Total Domestic Person-Trips (Millions)	1,963.7	1,997.5	2,030.3	2,059.6	2,109.3	2,178.7	2,206.5	2,245.9	2,286.3	2,322.4
Business	434.3	446.6	440.7	439.4	445.7	450.8	459.8	458.9	466.2	471.2
Leisure	1,465.9	1,517.1	1,556.8	1,590.9	1,614.0	1,658.4	1,718.9	1,747.5	1,779.7	1,815.1
Percent Change from Previous Year (%)										
Real GDP	2.5	1.6	2.2	1.7	2.4	2.6	2.0	2.4	2.3	1.7
Consumer Price Index*	1.6	3.1	2.1	1.5	1.6	0.1	1.2	2.3	2.1	2.0
Travel Price Index	3.8	6.5	2.3	0.9	1.5	-2.6	0.3	3.3	3.5	2.9
Total Travel Expenditures in U.S.	7.8	8.6	4.8	4.2	5.7	3.1	2.1	3.1	4.1	4.1
U.S. Residents	6.3	8.2	4.5	3.2	5.5	2.7	2.9	3.5	4.1	4.0
International Visitors**	17.8	11.0	6.8	10.0	7.0	5.2	-2.1	0.9	4.2	4.8
Total International Visitors to the U.S.	8.9	4.7	6.1	5.0	NA ^a	NA ^b	-2.4	-0.1	1.9	4.0
Overseas Arrivals to the U.S.	11.0	5.8	6.7	7.7	NA ^a	NA ^b	-2.1	0.2	2.9	4.2
Total Domestic Person-Trips	3.3	1.7	1.6	1.4	2.4	3.3	1.3	1.8	1.8	1.6
Business	2.8	-1.3	-0.3	1.4	1.2	2.0	-0.2	1.6	1.1	0.8
Leisure	3.5	2.6	2.2	1.5	2.8	3.6	1.7	1.8	2.0	1.8

Sources: U.S. Travel Association

* In chained 2009 dollars. ** 1982-84=100. *** International traveler spending does not include international passenger fares.

^a According to the National Travel and Tourism Office, the completion of the I-94 automation project now provides a more accurate determination of how many nights were spent in the United States which makes it possible to be more inclusive of one-night stays (travelers from overseas countries) given that the arrival-departure record match is now more complete and accurate. With the inclusion of one-night stay travelers in 2014, arrivals data from overseas countries in 2013 and 2014 are basically not comparable.

^b 2015 changes reflect a combination of additional records counted and market condition. As such, 2015 data is not comparable to earlier years.



Source: U.S. Travel Association, BEA

*Does not include international passenger fare payments and other economic impact generated by these payments.

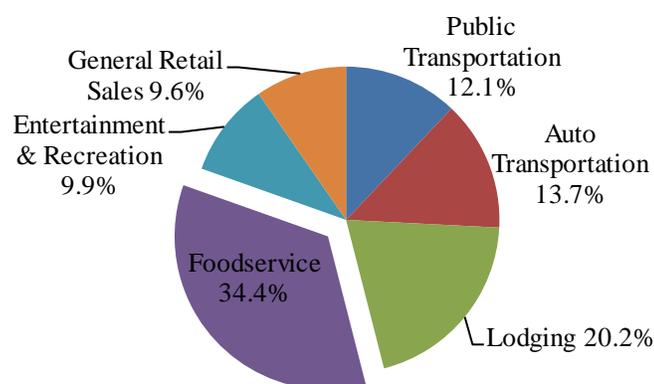
DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA

TRAVEL IMPACT ON NORTH CAROLINA - 2016

Travel Expenditures

- Domestic and international travelers in North Carolina directly spent \$23.8 billion during 2016 on transportation, lodging, food, entertainment and recreation, and retail trade, representing a 4.2 percent increase from 2015. Domestic traveler expenditures reached \$23.0 billion in 2016, up 4.5 percent from 2015, while international traveler expenditures decreased by 3.2 percent to \$803.1 million.
- In 2016, foodservice, the largest domestic traveler spending sector in North Carolina, reached \$7.9 billion and accounted for over one third (34.4%) of the state total domestic travelers' expenditures, up 5.8 percent from 2015.
- Domestic traveler expenditures on lodging ranked second with \$4.7 billion, 20.2 percent of the state total, up 9.1 percent from 2015.
- Domestic travelers spent \$3.2 billion on auto transportation, down 1.9 percent. This decrease mainly caused by declined gasoline prices.
- Domestic traveler spending on public transportation reached \$2.8 billion, down 1.6 percent from 2015.

**Domestic Travel Expenditures
in North Carolina
by Industry Sector, 2016**



-
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, 2015-2016

<i>2016 Expenditures</i>	Total (\$ Millions)	% of Domestic Total
Public Transportation	\$2,776.6	12.1%
Auto Transportation	3,163.5	13.7%
Lodging	4,654.7	20.2%
Foodservice	7,920.6	34.4%
Entertainment & Recreation	2,286.2	9.9%
General Retail Sales	2,219.9	9.6%
Domestic Total	23,021.5	100.0%
International Total	803.1	
Grand Total	\$23,824.5	

<i>2015 Expenditures</i>		
Public Transportation	\$2,821.8	12.8%
Auto Transportation	3,223.9	14.6%
Lodging	4,266.3	19.4%
Foodservice	7,488.0	34.0%
Entertainment & Recreation	2,101.3	9.5%
General Retail Sales	2,127.8	9.7%
Domestic Total	22,029.1	100.0%
International Total	829.2	
Grand Total	\$22,858.4	

***Percentage Change
2016 over 2015***

Public Transportation	-1.6%
Auto Transportation	-1.9%
Lodging	9.1%
Foodservice	5.8%
Entertainment & Recreation	8.8%
General Retail Sales	4.3%
Domestic Total	4.5%
International Total	-3.2%
Grand Total	4.2%

Source: U.S. Travel Association, Tourism Industries/ITA

Note: * Total domestic expenditures and percent change from previous year may not match those in county tables due to rounding.

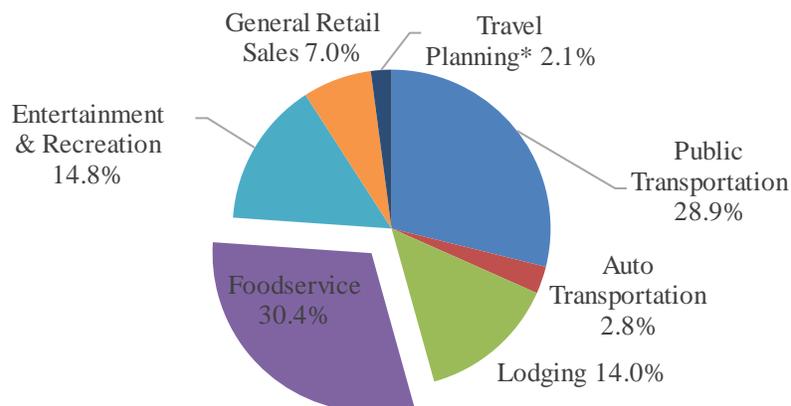
TRAVEL IMPACT ON NORTH CAROLINA - 2016

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 domestic and international traveler spending was \$5.8 billion in 2016, up 4.9 percent from 2015.
- In 2016, domestic traveler expenditures generated \$5.6 billion payroll income in North Carolina, a 5.2 percent increase from 2015, while international traveler expenditures generated \$231.2 million in payroll income, down 2.5 percent over 2015.
- On average in 2016, every dollar spent by domestic and international travelers in North Carolina produced 24 cents in wage and salary income.
- The foodservice sector, the largest payroll income sector among the seven payroll sectors studied in this report, posted \$1.7 billion in payroll income generated by domestic travel in 2016, for an increase of 6.0 percent.

**Domestic Travel Expenditures
Generated Payroll in North Carolina
by Industry Sector, 2016**



Travel-Generated Payroll

Table 6: Direct Travel-Generated Payroll in North Carolina by Industry Sector, 2015-2016

<i>2016 Payroll</i>	Total (\$ Millions)	% of Domestic Total
Public Transportation	\$1,605.3	28.9%
Auto Transportation	154.6	2.8%
Lodging	779.4	14.0%
Foodservice	1,690.8	30.4%
Entertainment & Recreation	822.7	14.8%
General Retail Sales	389.7	7.0%
Travel Planning*	116.3	2.1%
Domestic Total	5,558.7	100.0%
International Total	231.2	
Grand Total	\$5,789.9	
 <i>2015 Payroll</i>		
Public Transportation	\$1,541.0	29.2%
Auto Transportation	146.4	2.8%
Lodging	743.2	14.1%
Foodservice	1,595.5	30.2%
Entertainment & Recreation	767.8	14.5%
General Retail Sales	374.5	7.1%
Travel Planning*	113.5	2.1%
Domestic Total	5,282.0	100.0%
International Total	237.1	
Grand Total	\$5,519.1	
 <i>Percentage Change 2016 over 2015</i>		
Public Transportation	4.2%	
Auto Transportation	5.6%	
Lodging	4.9%	
Foodservice	6.0%	
Entertainment & Recreation	7.1%	
General Retail Sales	4.1%	
Travel Planning*	2.4%	
Domestic Total	5.2%	
International Total	-2.5%	
Grand Total	4.9%	

Source: U.S. Travel Association, Tourism Industries/ITA

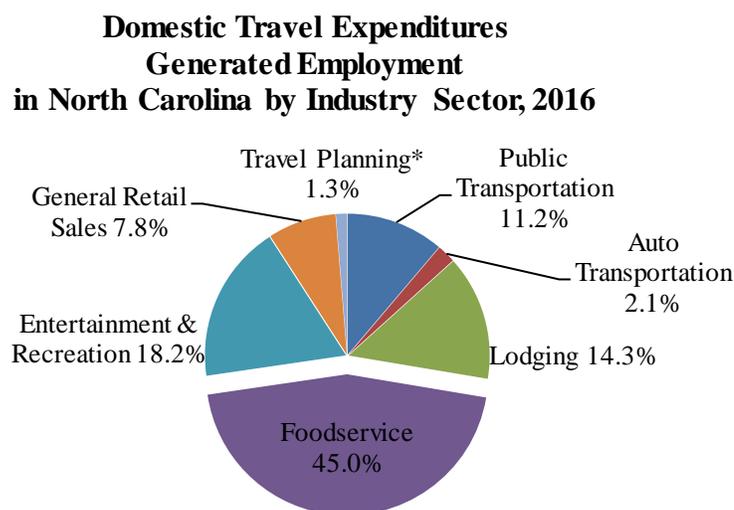
* Refers to payroll income that goes to travel agents, tour operators, and other travel service employees who arrange passenger transportation, lodging, tours and other related services.

TRAVEL IMPACT ON NORTH CAROLINA - 2016

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 2016, domestic and international traveler spending in North Carolina directly generated 228,500 jobs, including full-time and seasonal/part-time positions in the state, up 3.4 percent from 2015.
- On average, every \$104,249 spent by domestic and international travelers in North Carolina supported one job during 2016.
- In 2016, domestic traveler expenditures generated 219,700 jobs, a 3.7 percent increase from 2015, while international traveler expenditures directly generated 8,800 jobs, down 3.9 percent from 2015.
- It is important to note that these travel-related jobs composed 5.3 percent of total non-agricultural employment in North Carolina during 2016. Without these jobs, North Carolina's 2016 unemployment rate of 5.1 percent would have been 4.7 percentage points higher, or the equivalent of 9.7 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 2016, domestic traveler spending in this sector supported 99,000 jobs, accounting for 45.0 percent of the state total. The labor-intensiveness of these businesses and the large proportion of travel expenditures spent on foodservice contribute to the importance of this sector.



Travel-Generated Employment

Table 7: Direct Travel-Generated Employment in North Carolina by Industry Sector, 2015-2016

<i>2016 Employment</i>	Total (thousands)	% of Domestic Total
Public Transportation	24.6	11.2%
Auto Transportation	4.6	2.1%
Lodging	31.5	14.3%
Foodservice	99.0	45.0%
Entertainment & Recreation	40.0	18.2%
General Retail Sales	17.2	7.8%
Travel Planning*	2.8	1.3%

Domestic Total	219.7	100.0%
International Total	8.8	
Grand Total	228.5	

2015 Employment

Public Transportation	24.4	11.5%
Auto Transportation	4.5	2.1%
Lodging	30.6	14.4%
Foodservice	95.8	45.2%
Entertainment & Recreation	36.7	17.3%
General Retail Sales	17.0	8.0%
Travel Planning*	2.9	1.3%

Domestic Total	211.9	100.0%
International Total	9.2	
Grand Total	221.1	

**Percentage Change
2016 over 2015**

Public Transportation	0.7%
Auto Transportation	3.1%
Lodging	3.0%
Foodservice	3.3%
Entertainment & Recreation	8.8%
General Retail Sales	1.2%
Travel Planning*	-0.9%

Domestic Total	3.7%
International Total	-3.9%
Grand Total	3.4%

Source: U.S. Travel Association, Tourism Industries/ITA

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

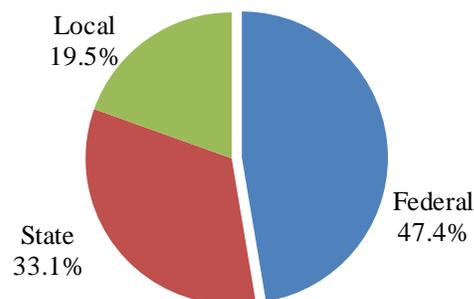
TRAVEL IMPACT ON NORTH CAROLINA - 2016

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 2016, total tax revenue, including federal, state and local taxes, generated by domestic and international traveler spending in North Carolina was more than \$3.7 billion, up 4.4 percent from 2015. Among this total, \$3.6 billion was directly generated by domestic travelers, up 4.6 percent from 2015, and \$127.1 million was generated by international traveler expenditures, a 3.0 percent decrease from 2015.
- Domestic traveler spending in North Carolina generated \$1.7 billion for the federal government in 2016, up 4.2 percent from 2015. This represents 47.4 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 generated \$1.2 billion in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 33.1 percent of all domestic travel-generated tax revenue collected in the state for 2016. On average, each travel dollar produced 5.2 cents in state tax receipts.
- During 2016, domestic traveler spending in North Carolina generated \$699.5 million for local government, up 5.0 percent from 2015. This represents 19.5 percent of total domestic travel-generated tax revenue in the state. Each domestic travel dollar produced 3.0 cents for local tax coffers.

**Domestic Travel Expenditures
Generated Tax Revenue
in North Carolina by Level of Government, 2016**



Travel-Generated Tax Revenue

Table 8: Direct Travel-Generated Tax Revenue in North Carolina by Level of Government, 2015-2016

<i>2016 Tax Revenue</i>	Total (\$ Millions)	% of Domestic Total
Federal	\$1,697.3	47.4%
State	1,187.2	33.1%
Local	699.5	19.5%
Domestic Total	3,584.0	100.0%
International Total	127.1	
Grand Total	\$3,711.1	
<i>2015 Tax Revenue</i>		
Federal	\$1,629.5	47.6%
State	1,129.3	33.0%
Local	666.3	19.5%
Domestic Total	3,425.1	100.0%
International Total	131.1	
Grand Total	\$3,556.2	
<i>Percentage Change 2016 over 2015</i>		
Federal	4.2%	
State	5.1%	
Local	5.0%	
Domestic Total	4.6%	
International Total	-3.0%	
Grand Total	4.4%	

Source: U.S. Travel Association, Tourism Industries/ITA

DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA COUNTIES-2016

During 2016, domestic travelers spent \$23.0 billion while traveling in North Carolina, up 4.5 percent from 2015. These expenditures directly generated \$5.6 billion in payroll income and 219,700 jobs. The federal government received \$1.7 billion in tax revenue through the domestic travel industry in North Carolina in 2016. Additionally, domestic traveler expenditures generated \$1.2 billion in tax revenue for the state treasury and \$699.5 million tax revenue for local governments during 2016.

Travel expenditures occurred throughout all 100 counties in North Carolina. The top five counties in North Carolina received \$10.9 billion in direct domestic travel expenditures during 2016, 47.2 percent of the state total. Direct domestic traveler spending in the top five counties generated \$3.3 billion in payroll income and supported 111,500 jobs in 2016.

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 2016. Domestic traveler spending in Mecklenburg County was \$5.2 billion, accounting for 22.4 percent of the state total. These expenditures generated \$1.8 billion in payroll income and supported 50,800 jobs for the county economy in 2016.

Wake County ranked second with \$2.2 billion in domestic traveler spending in 2016, representing 9.4 percent of the state total. The payroll income and jobs directly attributable to domestic traveler spending reached \$701.9 million and 22,700 jobs.

Guilford County posted \$1.3 billion in domestic traveler expenditures to rank third. These expenditures generated \$344.7 million in payroll income as well as 13,500 jobs within the county in 2016.

Dare County received \$1.1 billion from domestic travelers in 2016. These domestic traveler expenditures benefited the county with \$235.6 million in payroll income and 13,200 jobs.

Buncombe County ranked fifth with nearly \$1.1 billion in direct domestic traveler expenditures during 2016. These receipts from domestic travelers generated \$239.6 million in payroll income and 11,300 jobs.

Top Five Counties

Table 9: Domestic Travel Impact in North Carolina - Top 5 counties, 2015-2016

2016 Travel Impact

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
MECKLENBURG	\$5,163.7	\$1,785.5	50.8	\$246.2	\$125.8
WAKE	2,171.1	701.9	22.7	105.4	57.6
GUILFORD	1,349.3	344.7	13.5	70.5	30.5
DARE	1,101.6	235.6	13.2	53.1	49.3
BUNCOMBE	1,071.7	239.6	11.3	55.0	34.7
FIVE COUNTY TOTALS	\$10,857.5	\$3,307.3	111.5	\$530.3	\$298.0
STATE TOTALS	\$23,021.5	\$5,558.7	219.7	\$1,187.2	\$699.5
FIVE COUNTY SHARES	47.2%	59.5%	50.8%	44.7%	42.6%

2015 Travel Impact

MECKLENBURG	\$5,037.9	\$1,725.9	49.9	\$238.9	\$122.4
WAKE	2,072.0	663.9	21.9	100.0	54.8
GUILFORD	1,296.3	328.1	13.1	67.4	29.2
DARE	1,052.7	223.0	12.7	50.5	47.0
BUNCOMBE	1,001.0	221.7	10.6	51.0	32.4
FIVE COUNTY TOTALS	\$10,459.9	\$3,162.6	108.2	\$507.8	\$285.9
STATE TOTALS	\$22,029.1	\$5,282.0	211.9	\$1,129.3	\$666.3
FIVE COUNTY SHARES	47.5%	59.9%	51.1%	45.0%	42.9%
MECKLENBURG	\$5,037.9	\$1,725.9	49.9	\$238.9	\$122.4

**Percent Change
2016 over 2015**

MECKLENBURG	2.5%	3.5%	1.9%	3.1%	2.8%
WAKE	4.8%	5.7%	3.8%	5.4%	5.1%
GUILFORD	4.1%	5.1%	3.1%	4.7%	4.4%
DARE	4.6%	5.6%	3.7%	5.3%	4.9%
BUNCOMBE	7.1%	8.1%	6.1%	7.7%	7.3%
FIVE COUNTY TOTALS	3.8%	4.6%	3.0%	4.4%	4.2%
STATE TOTALS	4.5%	5.2%	3.7%	5.1%	5.0%

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 2016 and 2015. The estimates presented are for direct domestic travel expenditures and related economic impact.

- Table A shows the counties listed alphabetically, with 2016 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 2016 travel expenditures from highest to lowest.
- Table C shows the percent distribution for each impact measure in 2016.
- Table D shows the percent change in 2016 over 2015 estimates for each of the measures of economic impact.
- Table E shows the counties listed alphabetically, with 2015 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

Table A: Alphabetical by County, 2016

2016 Impact of Travel on North Carolina					
Table A: Alphabetical by County, 2016					
<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	\$179.95	\$29.58	1.40	\$10.66	\$3.13
ALEXANDER	19.90	3.04	0.12	1.12	0.82
ALLEGHANY	23.83	4.42	0.19	1.15	1.59
ANSON	16.64	2.08	0.10	0.99	0.41
ASHE	54.96	8.34	0.42	2.87	2.95
AVERY	119.45	27.93	1.30	6.03	5.26
BEAUFORT	81.36	10.93	0.47	4.17	4.79
BERTIE	13.18	1.34	0.05	0.75	0.73
BLADEN	38.70	4.16	0.19	2.38	1.11
BRUNSWICK	544.35	105.40	5.65	25.42	33.00
BUNCOMBE	1,071.66	239.56	11.29	54.96	34.73
BURKE	98.56	14.76	0.73	5.49	2.77
CABARRUS	433.42	98.82	4.50	24.94	7.58
CALDWELL	52.57	8.15	0.36	2.91	1.61
CAMDEN	2.01	0.23	0.01	0.11	0.16
CARTERET	351.67	65.05	3.45	15.97	20.63
CASWELL	8.92	0.95	0.04	0.43	0.63
CATAWBA	264.75	49.17	2.37	14.73	7.84
CHATHAM	33.81	4.19	0.19	2.03	0.62
CHEROKEE	48.18	7.54	0.38	2.24	2.74
CHOWAN	21.29	3.26	0.16	1.04	1.35
CLAY	13.26	1.50	0.06	0.55	1.47
CLEVELAND	107.02	15.95	0.72	6.39	1.88
COLUMBUS	53.52	6.59	0.30	3.12	1.46
CRAVEN	136.99	26.89	1.14	7.57	2.98
CUMBERLAND	525.95	98.55	4.55	28.57	11.09
CURRITUCK	224.64	40.08	2.05	10.60	12.77

Table A: Alphabetical by County, 2016

2016 Impact of Travel on North Carolina					
Table A: Alphabetical by County, 2016 (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	1,101.63	235.58	13.18	53.14	49.34
DAVIDSON	159.69	23.02	1.03	9.03	5.19
DAVIE	36.50	6.78	0.30	2.06	0.65
DUPLIN	39.96	4.71	0.21	2.35	1.30
DURHAM	776.29	164.72	8.78	41.85	25.99
EDGECOMBE	58.03	8.23	0.37	3.27	1.03
FORSYTH	846.67	148.71	6.84	50.55	15.47
FRANKLIN	23.54	2.83	0.13	1.32	0.59
GASTON	251.89	41.20	1.95	14.54	4.14
GATES	6.23	0.55	0.02	0.39	0.23
GRAHAM	26.92	4.78	0.27	1.28	1.80
GRANVILLE	47.11	6.02	0.30	2.81	1.33
GREENE	5.87	0.60	0.03	0.33	0.21
GUILFORD	1,349.31	344.66	13.54	70.55	30.51
HALIFAX	91.84	11.30	0.54	5.73	2.23
HARNETT	85.10	12.52	0.63	4.72	1.97
HAYWOOD	178.79	38.51	1.81	9.97	6.67
HENDERSON	275.02	50.42	2.33	12.58	11.75
HERTFORD	28.46	3.72	0.18	1.73	0.72
HOKE	11.42	1.45	0.08	0.65	0.18
HYDE	34.67	6.90	0.39	1.65	1.89
IREDELL	247.51	39.65	1.91	13.76	7.55
JACKSON	188.45	44.91	1.81	10.55	8.63
JOHNSTON	232.70	36.71	1.84	13.15	5.84
JONES	4.05	0.57	0.02	0.25	0.13
LEE	75.30	13.65	0.65	4.39	1.51
LENOIR	84.18	14.48	0.63	4.76	1.63

Table A: Alphabetical by County, 2016

2016 Impact of Travel on North Carolina					
Table A: Alphabetical by County, 2016 (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	53.60	8.90	0.39	3.01	1.60
MACON	164.14	29.31	1.33	7.44	13.03
MADISON	38.13	7.64	0.35	1.98	1.74
MARTIN	31.44	4.84	0.24	1.74	0.77
MCDOWELL	56.62	8.75	0.44	3.02	2.04
MECKLENBURG	5,163.74	1,785.54	50.80	246.24	125.79
MITCHELL	23.05	3.62	0.17	1.03	1.00
MONTGOMERY	29.29	3.06	0.12	1.37	3.01
MOORE	469.41	108.35	5.73	24.21	13.88
NASH	288.58	57.68	3.08	15.30	7.83
NEW HANOVER	554.29	130.02	6.16	27.16	22.19
NORTHAMPTON	14.45	1.72	0.06	0.66	1.23
ONSLow	222.24	42.39	1.78	11.77	8.39
ORANGE	192.84	37.46	1.89	10.49	4.16
PAMLICO	17.72	2.17	0.08	0.74	1.94
PASQUOTANK	62.37	9.79	0.51	3.48	1.41
PENDER	92.31	16.46	0.81	4.47	6.39
PERQUIMANS	10.41	1.30	0.05	0.44	1.18
PERSON	36.38	4.64	0.22	2.17	0.81
PITT	231.40	47.04	2.17	12.16	5.11
POLK	28.37	4.20	0.21	1.50	1.60
RANDOLPH	138.98	21.91	1.00	8.53	2.25
RICHMOND	47.85	8.71	0.42	2.56	0.90
ROBESON	144.79	22.30	1.16	8.50	2.87
ROCKINGHAM	70.91	12.01	0.57	3.79	1.71
ROWAN	166.99	28.18	1.40	8.95	5.37
RUTHERFORD	173.97	25.48	1.28	10.53	5.24

Table A: Alphabetical by County, 2016

2016 Impact of Travel on North Carolina						
Table A: Alphabetical by County, 2016 (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	50.60	6.73	0.30	2.88	1.61	
SCOTLAND	43.71	7.37	0.38	2.44	0.76	
STANLY	79.42	10.79	0.51	4.68	2.36	
STOKES	24.19	3.20	0.14	1.25	0.95	
SURRY	121.24	18.09	0.84	6.81	2.60	
SWAIN	202.54	59.27	2.21	12.74	4.46	
TRANSYLVANIA	94.76	17.73	0.81	3.70	4.34	
TYRRELL	3.63	0.36	0.02	0.17	0.34	
UNION	133.40	21.51	1.04	7.46	2.39	
VANCE	48.14	6.71	0.30	2.93	1.41	
WAKE	2,171.14	701.93	22.74	105.43	57.63	
WARREN	25.44	3.21	0.12	0.94	2.25	
WASHINGTON	15.02	2.03	0.10	0.85	0.64	
WATAUGA	248.55	56.63	2.81	12.54	9.72	
WAYNE	162.41	22.32	1.06	10.25	2.48	
WILKES	74.88	11.34	0.55	3.73	1.80	
WILSON	115.69	17.53	0.86	6.91	2.22	
YADKIN	37.94	6.73	0.36	2.06	0.92	
<u>YANCEY</u>	<u>36.89</u>	<u>6.18</u>	<u>0.25</u>	<u>1.67</u>	<u>2.59</u>	
STATE TOTALS	\$23,021.47	\$5,558.72	219.70	\$1,187.24	\$699.49	

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Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Impact of Travel on North Carolina					
Table B: Ranking of Counties by Expenditure Levels, 2016					
<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	\$5,163.74	\$1,785.54	50.80	\$246.24	\$125.79
WAKE	2,171.14	701.93	22.74	105.43	57.63
GUILFORD	1,349.31	344.66	13.54	70.55	30.51
DARE	1,101.63	235.58	13.18	53.14	49.34
BUNCOMBE	1,071.66	239.56	11.29	54.96	34.73
FORSYTH	846.67	148.71	6.84	50.55	15.47
DURHAM	776.29	164.72	8.78	41.85	25.99
NEW HANOVER	554.29	130.02	6.16	27.16	22.19
BRUNSWICK	544.35	105.40	5.65	25.42	33.00
CUMBERLAND	525.95	98.55	4.55	28.57	11.09
MOORE	469.41	108.35	5.73	24.21	13.88
CABARRUS	433.42	98.82	4.50	24.94	7.58
CARTERET	351.67	65.05	3.45	15.97	20.63
NASH	288.58	57.68	3.08	15.30	7.83
HENDERSON	275.02	50.42	2.33	12.58	11.75
CATAWBA	264.75	49.17	2.37	14.73	7.84
GASTON	251.89	41.20	1.95	14.54	4.14
WATAUGA	248.55	56.63	2.81	12.54	9.72
IREDELL	247.51	39.65	1.91	13.76	7.55
JOHNSTON	232.70	36.71	1.84	13.15	5.84
PITT	231.40	47.04	2.17	12.16	5.11
CURRITUCK	224.64	40.08	2.05	10.60	12.77
ONSLow	222.24	42.39	1.78	11.77	8.39
SWAIN	202.54	59.27	2.21	12.74	4.46
ORANGE	192.84	37.46	1.89	10.49	4.16
JACKSON	188.45	44.91	1.81	10.55	8.63
ALAMANCE	179.95	29.58	1.40	10.66	3.13

Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Impact of Travel on North Carolina						
Table B: Ranking of Counties by Expenditure Levels, 2016 (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>	
HAYWOOD	178.79	38.51	1.81	9.97	6.67	
RUTHERFORD	173.97	25.48	1.28	10.53	5.24	
ROWAN	166.99	28.18	1.40	8.95	5.37	
MACON	164.14	29.31	1.33	7.44	13.03	
WAYNE	162.41	22.32	1.06	10.25	2.48	
DAVIDSON	159.69	23.02	1.03	9.03	5.19	
ROBESON	144.79	22.30	1.16	8.50	2.87	
RANDOLPH	138.98	21.91	1.00	8.53	2.25	
CRAVEN	136.99	26.89	1.14	7.57	2.98	
UNION	133.40	21.51	1.04	7.46	2.39	
SURRY	121.24	18.09	0.84	6.81	2.60	
AVERY	119.45	27.93	1.30	6.03	5.26	
WILSON	115.69	17.53	0.86	6.91	2.22	
CLEVELAND	107.02	15.95	0.72	6.39	1.88	
BURKE	98.56	14.76	0.73	5.49	2.77	
TRANSYLVANIA	94.76	17.73	0.81	3.70	4.34	
PENDER	92.31	16.46	0.81	4.47	6.39	
HALIFAX	91.84	11.30	0.54	5.73	2.23	
HARNETT	85.10	12.52	0.63	4.72	1.97	
LENOIR	84.18	14.48	0.63	4.76	1.63	
BEAUFORT	81.36	10.93	0.47	4.17	4.79	
STANLY	79.42	10.79	0.51	4.68	2.36	
LEE	75.30	13.65	0.65	4.39	1.51	
WILKES	74.88	11.34	0.55	3.73	1.80	
ROCKINGHAM	70.91	12.01	0.57	3.79	1.71	
PASQUOTANK	62.37	9.79	0.51	3.48	1.41	
EDGECOMBE	58.03	8.23	0.37	3.27	1.03	

Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Impact of Travel on North Carolina						
Table B: Ranking of Counties by Expenditure Levels, 2016 (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>	
MCDOWELL	56.62	8.75	0.44	3.02	2.04	
ASHE	54.96	8.34	0.42	2.87	2.95	
LINCOLN	53.60	8.90	0.39	3.01	1.60	
COLUMBUS	53.52	6.59	0.30	3.12	1.46	
CALDWELL	52.57	8.15	0.36	2.91	1.61	
SAMPSON	50.60	6.73	0.30	2.88	1.61	
CHEROKEE	48.18	7.54	0.38	2.24	2.74	
VANCE	48.14	6.71	0.30	2.93	1.41	
RICHMOND	47.85	8.71	0.42	2.56	0.90	
GRANVILLE	47.11	6.02	0.30	2.81	1.33	
SCOTLAND	43.71	7.37	0.38	2.44	0.76	
DUPLIN	39.96	4.71	0.21	2.35	1.30	
BLADEN	38.70	4.16	0.19	2.38	1.11	
MADISON	38.13	7.64	0.35	1.98	1.74	
YADKIN	37.94	6.73	0.36	2.06	0.92	
YANCEY	36.89	6.18	0.25	1.67	2.59	
DAVIE	36.50	6.78	0.30	2.06	0.65	
PERSON	36.38	4.64	0.22	2.17	0.81	
HYDE	34.67	6.90	0.39	1.65	1.89	
CHATHAM	33.81	4.19	0.19	2.03	0.62	
MARTIN	31.44	4.84	0.24	1.74	0.77	
MONTGOMERY	29.29	3.06	0.12	1.37	3.01	
HERTFORD	28.46	3.72	0.18	1.73	0.72	
POLK	28.37	4.20	0.21	1.50	1.60	
GRAHAM	26.92	4.78	0.27	1.28	1.80	
WARREN	25.44	3.21	0.12	0.94	2.25	
STOKES	24.19	3.20	0.14	1.25	0.95	

Table B: Ranking of Counties by Expenditure Levels, 2016

2016 Impact of Travel on North Carolina						
Table B: Ranking of Counties by Expenditure Levels, 2016 (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	23.83	4.42	0.19	1.15	1.59	
FRANKLIN	23.54	2.83	0.13	1.32	0.59	
MITCHELL	23.05	3.62	0.17	1.03	1.00	
CHOWAN	21.29	3.26	0.16	1.04	1.35	
ALEXANDER	19.90	3.04	0.12	1.12	0.82	
PAMLICO	17.72	2.17	0.08	0.74	1.94	
ANSON	16.64	2.08	0.10	0.99	0.41	
WASHINGTON	15.02	2.03	0.10	0.85	0.64	
NORTHAMPTON	14.45	1.72	0.06	0.66	1.23	
CLAY	13.26	1.50	0.06	0.55	1.47	
BERTIE	13.18	1.34	0.05	0.75	0.73	
HOKE	11.42	1.45	0.08	0.65	0.18	
PERQUIMANS	10.41	1.30	0.05	0.44	1.18	
CASWELL	8.92	0.95	0.04	0.43	0.63	
GATES	6.23	0.55	0.02	0.39	0.23	
GREENE	5.87	0.60	0.03	0.33	0.21	
JONES	4.05	0.57	0.02	0.25	0.13	
TYRRELL	3.63	0.36	0.02	0.17	0.34	
<u>CAMDEN</u>	<u>2.01</u>	<u>0.23</u>	<u>0.01</u>	<u>0.11</u>	<u>0.16</u>	
STATE TOTALS	\$23,021.47	\$5,558.72	219.70	\$1,187.24	\$699.49	

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Table C: Percent Distribution by County, 2016

2016 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2016					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ALAMANCE	0.78%	0.53%	0.64%	0.90%	0.45%
ALEXANDER	0.09%	0.05%	0.05%	0.09%	0.12%
ALLEGHANY	0.10%	0.08%	0.09%	0.10%	0.23%
ANSON	0.07%	0.04%	0.05%	0.08%	0.06%
ASHE	0.24%	0.15%	0.19%	0.24%	0.42%
AVERY	0.52%	0.50%	0.59%	0.51%	0.75%
BEAUFORT	0.35%	0.20%	0.22%	0.35%	0.68%
BERTIE	0.06%	0.02%	0.02%	0.06%	0.10%
BLADEN	0.17%	0.07%	0.09%	0.20%	0.16%
BRUNSWICK	2.36%	1.90%	2.57%	2.14%	4.72%
BUNCOMBE	4.66%	4.31%	5.14%	4.63%	4.97%
BURKE	0.43%	0.27%	0.33%	0.46%	0.40%
CABARRUS	1.88%	1.78%	2.05%	2.10%	1.08%
CALDWELL	0.23%	0.15%	0.16%	0.24%	0.23%
CAMDEN	0.01%	0.00%	0.00%	0.01%	0.02%
CARTERET	1.53%	1.17%	1.57%	1.35%	2.95%
CASWELL	0.04%	0.02%	0.02%	0.04%	0.09%
CATAWBA	1.15%	0.88%	1.08%	1.24%	1.12%
CHATHAM	0.15%	0.08%	0.08%	0.17%	0.09%
CHEROKEE	0.21%	0.14%	0.17%	0.19%	0.39%
CHOWAN	0.09%	0.06%	0.07%	0.09%	0.19%
CLAY	0.06%	0.03%	0.03%	0.05%	0.21%
CLEVELAND	0.46%	0.29%	0.33%	0.54%	0.27%
COLUMBUS	0.23%	0.12%	0.14%	0.26%	0.21%
CRAVEN	0.60%	0.48%	0.52%	0.64%	0.43%
CUMBERLAND	2.28%	1.77%	2.07%	2.41%	1.59%
CURRITUCK	0.98%	0.72%	0.93%	0.89%	1.83%

Table C: Percent Distribution by County, 2016

2016 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2016 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DARE	4.79%	4.24%	6.00%	4.48%	7.05%
DAVIDSON	0.69%	0.41%	0.47%	0.76%	0.74%
DAVIE	0.16%	0.12%	0.14%	0.17%	0.09%
DUPLIN	0.17%	0.08%	0.09%	0.20%	0.19%
DURHAM	3.37%	2.96%	4.00%	3.52%	3.71%
EDGECOMBE	0.25%	0.15%	0.17%	0.28%	0.15%
FORSYTH	3.68%	2.68%	3.11%	4.26%	2.21%
FRANKLIN	0.10%	0.05%	0.06%	0.11%	0.08%
GASTON	1.09%	0.74%	0.89%	1.22%	0.59%
GATES	0.03%	0.01%	0.01%	0.03%	0.03%
GRAHAM	0.12%	0.09%	0.12%	0.11%	0.26%
GRANVILLE	0.20%	0.11%	0.14%	0.24%	0.19%
GREENE	0.03%	0.01%	0.01%	0.03%	0.03%
GUILFORD	5.86%	6.20%	6.16%	5.94%	4.36%
HALIFAX	0.40%	0.20%	0.24%	0.48%	0.32%
HARNETT	0.37%	0.23%	0.28%	0.40%	0.28%
HAYWOOD	0.78%	0.69%	0.82%	0.84%	0.95%
HENDERSON	1.19%	0.91%	1.06%	1.06%	1.68%
HERTFORD	0.12%	0.07%	0.08%	0.15%	0.10%
HOKE	0.05%	0.03%	0.03%	0.05%	0.03%
HYDE	0.15%	0.12%	0.18%	0.14%	0.27%
IREDELL	1.08%	0.71%	0.87%	1.16%	1.08%
JACKSON	0.82%	0.81%	0.82%	0.89%	1.23%
JOHNSTON	1.01%	0.66%	0.84%	1.11%	0.83%
JONES	0.02%	0.01%	0.01%	0.02%	0.02%
LEE	0.33%	0.25%	0.30%	0.37%	0.22%
LENOIR	0.37%	0.26%	0.29%	0.40%	0.23%

Table C: Percent Distribution by County, 2016

2016 Impact of Travel on North Carolina Table C: Percent Distribution by County, 2016 (Continued)					
County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
LINCOLN	0.23%	0.16%	0.18%	0.25%	0.23%
MACON	0.71%	0.53%	0.61%	0.63%	1.86%
MADISON	0.17%	0.14%	0.16%	0.17%	0.25%
MARTIN	0.14%	0.09%	0.11%	0.15%	0.11%
MCDOWELL	0.25%	0.16%	0.20%	0.25%	0.29%
MECKLENBURG	22.43%	32.12%	23.12%	20.74%	17.98%
MITCHELL	0.10%	0.07%	0.08%	0.09%	0.14%
MONTGOMERY	0.13%	0.06%	0.05%	0.12%	0.43%
MOORE	2.04%	1.95%	2.61%	2.04%	1.98%
NASH	1.25%	1.04%	1.40%	1.29%	1.12%
NEW HANOVER	2.41%	2.34%	2.80%	2.29%	3.17%
NORTHAMPTON	0.06%	0.03%	0.03%	0.06%	0.18%
ONSLOW	0.97%	0.76%	0.81%	0.99%	1.20%
ORANGE	0.84%	0.67%	0.86%	0.88%	0.59%
PAMLICO	0.08%	0.04%	0.04%	0.06%	0.28%
PASQUOTANK	0.27%	0.18%	0.23%	0.29%	0.20%
PENDER	0.40%	0.30%	0.37%	0.38%	0.91%
PERQUIMANS	0.05%	0.02%	0.02%	0.04%	0.17%
PERSON	0.16%	0.08%	0.10%	0.18%	0.12%
PITT	1.01%	0.85%	0.99%	1.02%	0.73%
POLK	0.12%	0.08%	0.10%	0.13%	0.23%
RANDOLPH	0.60%	0.39%	0.45%	0.72%	0.32%
RICHMOND	0.21%	0.16%	0.19%	0.22%	0.13%
ROBESON	0.63%	0.40%	0.53%	0.72%	0.41%
ROCKINGHAM	0.31%	0.22%	0.26%	0.32%	0.25%
ROWAN	0.73%	0.51%	0.64%	0.75%	0.77%
RUTHERFORD	0.76%	0.46%	0.58%	0.89%	0.75%

Table C: Percent Distribution by County, 2016

2016 Impact of Travel on North Carolina						
Table C: Percent Distribution by County, 2016 (Continued)						
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>	
SAMPSON	0.22%	0.12%	0.14%	0.24%	0.23%	
SCOTLAND	0.19%	0.13%	0.17%	0.21%	0.11%	
STANLY	0.34%	0.19%	0.23%	0.39%	0.34%	
STOKES	0.11%	0.06%	0.06%	0.11%	0.14%	
SURRY	0.53%	0.33%	0.38%	0.57%	0.37%	
SWAIN	0.88%	1.07%	1.01%	1.07%	0.64%	
TRANSYLVANIA	0.41%	0.32%	0.37%	0.31%	0.62%	
TYRRELL	0.02%	0.01%	0.01%	0.01%	0.05%	
UNION	0.58%	0.39%	0.47%	0.63%	0.34%	
VANCE	0.21%	0.12%	0.14%	0.25%	0.20%	
WAKE	9.43%	12.63%	10.35%	8.88%	8.24%	
WARREN	0.11%	0.06%	0.06%	0.08%	0.32%	
WASHINGTON	0.07%	0.04%	0.04%	0.07%	0.09%	
WATAUGA	1.08%	1.02%	1.28%	1.06%	1.39%	
WAYNE	0.71%	0.40%	0.48%	0.86%	0.36%	
WILKES	0.33%	0.20%	0.25%	0.31%	0.26%	
WILSON	0.50%	0.32%	0.39%	0.58%	0.32%	
YADKIN	0.16%	0.12%	0.16%	0.17%	0.13%	
<u>YANCEY</u>	<u>0.16%</u>	<u>0.11%</u>	<u>0.11%</u>	<u>0.14%</u>	<u>0.37%</u>	
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%	

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Table D: Percent Change from 2016

2016 Impact of Travel on North Carolina
Table D: Percent Change from 2015

<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ALAMANCE	4.69%	5.67%	3.74%	5.29%	4.95%
ALEXANDER	5.71%	6.70%	4.76%	6.32%	5.97%
ALLEGHANY	6.01%	7.00%	5.05%	6.62%	6.27%
ANSON	0.96%	1.14%	0.68%	1.54%	1.21%
ASHE	6.53%	7.52%	5.56%	7.14%	6.79%
AVERY	5.14%	6.12%	4.19%	5.75%	5.40%
BEAUFORT	4.70%	5.68%	3.75%	5.30%	4.96%
BERTIE	-0.07%	0.87%	-0.97%	0.51%	0.18%
BLADEN	1.86%	2.17%	1.44%	2.44%	2.11%
BRUNSWICK	6.97%	7.97%	6.00%	7.59%	7.24%
BUNCOMBE	7.06%	8.06%	6.10%	7.68%	7.33%
BURKE	4.85%	5.83%	3.90%	5.46%	5.11%
CABARRUS	5.31%	6.29%	4.35%	5.91%	5.57%
CALDWELL	2.75%	3.53%	1.92%	3.35%	3.01%
CAMDEN	1.83%	2.79%	0.91%	2.42%	2.09%
CARTERET	4.37%	5.34%	3.42%	4.97%	4.63%
CASWELL	5.35%	6.34%	4.40%	5.96%	5.62%
CATAWBA	4.73%	5.71%	3.78%	5.33%	4.99%
CHATHAM	4.16%	5.13%	3.22%	4.76%	4.42%
CHEROKEE	13.52%	14.59%	12.50%	14.18%	13.81%
CHOWAN	6.33%	7.32%	5.37%	6.94%	6.59%
CLAY	5.25%	6.24%	4.30%	5.86%	5.52%
CLEVELAND	5.85%	6.84%	4.89%	6.46%	6.12%
COLUMBUS	1.95%	2.44%	1.25%	2.54%	2.21%
CRAVEN	4.94%	5.92%	3.99%	5.54%	5.20%
CUMBERLAND	4.32%	5.29%	3.37%	4.92%	4.58%
CURRITUCK	4.55%	5.39%	2.51%	4.82%	4.47%

Table D: Percent Change from 2016

2016 Impact of Travel on North Carolina						
Table D: Percent Change from 2015 (Continued)						
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>	
DARE	4.65%	5.63%	3.70%	5.25%	4.91%	
DAVIDSON	2.98%	3.38%	2.41%	3.58%	3.24%	
DAVIE	5.09%	6.07%	4.14%	5.69%	5.35%	
DUPLIN	2.04%	2.56%	1.35%	2.63%	2.29%	
DURHAM	6.77%	7.77%	5.81%	7.39%	7.04%	
EDGECOMBE	3.65%	4.62%	2.72%	4.25%	3.91%	
FORSYTH	4.62%	5.60%	3.67%	5.22%	4.88%	
FRANKLIN	3.96%	4.94%	3.02%	4.56%	4.22%	
GASTON	4.27%	5.25%	3.33%	4.87%	4.53%	
GATES	0.27%	0.49%	-0.30%	0.85%	0.52%	
GRAHAM	5.40%	6.39%	4.45%	6.01%	5.67%	
GRANVILLE	3.11%	4.08%	2.18%	3.71%	3.37%	
GREENE	4.87%	5.85%	3.92%	5.47%	5.13%	
GUILFORD	4.09%	5.06%	3.15%	4.69%	4.35%	
HALIFAX	2.37%	2.78%	1.75%	2.96%	2.62%	
HARNETT	5.83%	6.82%	4.87%	6.44%	6.09%	
HAYWOOD	6.70%	7.70%	5.74%	7.32%	6.97%	
HENDERSON	6.62%	7.61%	5.65%	7.23%	6.88%	
HERTFORD	2.62%	3.58%	1.69%	3.21%	2.87%	
HOKE	5.67%	6.66%	4.72%	6.28%	5.94%	
HYDE	3.38%	4.35%	2.45%	3.98%	3.64%	
IREDELL	5.86%	6.85%	4.91%	6.47%	6.13%	
JACKSON	7.12%	8.13%	6.16%	7.74%	7.39%	
JOHNSTON	4.95%	5.93%	4.00%	5.56%	5.21%	
JONES	1.68%	2.10%	1.01%	2.26%	1.93%	
LEE	5.11%	6.09%	4.16%	5.72%	5.37%	
LENOIR	3.79%	4.76%	2.85%	4.39%	4.05%	

Table D: Percent Change from 2016

2016 Impact of Travel on North Carolina					
Table D: Percent Change from 2015 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
LINCOLN	2.35%	3.30%	1.42%	2.94%	2.60%
MACON	6.42%	7.42%	5.46%	7.04%	6.69%
MADISON	6.34%	7.33%	5.38%	6.95%	6.60%
MARTIN	3.79%	4.76%	2.85%	4.39%	4.05%
MCDOWELL	4.27%	5.24%	3.33%	4.87%	4.53%
MECKLENBURG	2.50%	3.46%	1.86%	3.09%	2.75%
MITCHELL	4.19%	5.16%	3.25%	4.79%	4.45%
MONTGOMERY	5.92%	6.91%	4.96%	6.53%	6.18%
MOORE	6.24%	7.23%	5.28%	6.85%	6.51%
NASH	4.49%	5.47%	3.55%	5.09%	4.75%
NEW HANOVER	6.42%	7.41%	5.46%	7.03%	6.68%
NORTHAMPTON	5.91%	6.90%	4.95%	6.52%	6.17%
ONSLOW	2.80%	3.76%	1.87%	3.39%	3.06%
ORANGE	4.55%	5.53%	3.60%	5.15%	4.81%
PAMLICO	3.55%	4.51%	2.61%	4.14%	3.80%
PASQUOTANK	4.87%	5.85%	3.93%	5.48%	5.14%
PENDER	-0.04%	0.89%	-0.94%	0.53%	0.21%
PERQUIMANS	6.16%	7.15%	5.20%	6.77%	6.43%
PERSON	2.75%	3.71%	1.82%	3.34%	3.00%
PITT	5.75%	6.73%	4.79%	6.35%	6.01%
POLK	6.04%	7.03%	5.08%	6.65%	6.30%
RANDOLPH	5.82%	6.81%	4.86%	6.43%	6.08%
RICHMOND	2.00%	2.50%	1.30%	2.58%	2.25%
ROBESON	5.01%	5.99%	4.06%	5.61%	5.27%
ROCKINGHAM	4.82%	5.80%	3.87%	5.42%	5.08%
ROWAN	4.07%	5.04%	3.13%	4.67%	4.33%
RUTHERFORD	6.02%	7.01%	5.06%	6.63%	6.29%

Table D: Percent Change from 2016

2016 Impact of Travel on North Carolina					
Table D: Percent Change from 2015 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SAMPSON	4.77%	5.75%	3.82%	5.37%	5.03%
SCOTLAND	3.53%	4.50%	2.59%	4.12%	3.79%
STANLY	4.25%	5.22%	3.30%	4.85%	4.51%
STOKES	3.37%	4.34%	2.44%	3.97%	3.63%
SURRY	3.96%	4.93%	3.02%	4.56%	4.22%
SWAIN	4.83%	5.81%	3.88%	5.43%	5.09%
TRANSYLVANIA	6.65%	7.65%	5.69%	7.26%	6.92%
TYRRELL	1.54%	2.04%	0.83%	2.13%	1.80%
UNION	5.88%	6.87%	4.92%	6.49%	6.14%
VANCE	4.26%	5.23%	3.32%	4.86%	4.52%
WAKE	4.78%	5.73%	3.83%	5.39%	5.07%
WARREN	0.00%	1.42%	-0.69%	0.57%	0.25%
WASHINGTON	2.25%	3.21%	1.33%	2.84%	2.51%
WATAUGA	7.39%	8.40%	6.42%	8.01%	7.66%
WAYNE	4.01%	4.98%	3.07%	4.61%	4.27%
WILKES	3.73%	4.70%	2.79%	4.33%	3.99%
WILSON	3.99%	4.96%	3.05%	4.59%	4.25%
YADKIN	4.92%	5.90%	3.97%	5.53%	5.18%
<u>YANCEY</u>	<u>6.24%</u>	<u>7.23%</u>	<u>5.28%</u>	<u>6.85%</u>	<u>6.50%</u>
STATE TOTALS	4.50%	5.24%	3.68%	5.13%	4.98%

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Table E: Alphabetical by County, 2015

2015 Impact of Travel on North Carolina					
Table E: Alphabetical by County, 2015					
<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	\$171.88	\$27.99	1.35	\$10.13	\$2.99
ALEXANDER	18.83	2.85	0.12	1.06	0.77
ALLEGHANY	22.48	4.13	0.18	1.07	1.50
ANSON	16.48	2.06	0.10	0.97	0.40
ASHE	51.59	7.76	0.40	2.68	2.76
AVERY	113.61	26.32	1.25	5.70	4.99
BEAUFORT	77.71	10.34	0.46	3.96	4.56
BERTIE	13.18	1.33	0.05	0.74	0.73
BLADEN	37.99	4.07	0.19	2.32	1.09
BRUNSWICK	508.88	97.62	5.33	23.63	30.77
BUNCOMBE	1,000.95	221.68	10.64	51.04	32.36
BURKE	94.00	13.95	0.70	5.21	2.63
CABARRUS	411.58	92.97	4.32	23.55	7.18
CALDWELL	51.16	7.87	0.35	2.81	1.57
CAMDEN	1.97	0.22	0.01	0.11	0.16
CARTERET	336.96	61.75	3.33	15.22	19.71
CASWELL	8.46	0.90	0.04	0.40	0.60
CATAWBA	252.79	46.51	2.28	13.99	7.47
CHATHAM	32.46	3.99	0.18	1.93	0.59
CHEROKEE	42.44	6.58	0.34	1.97	2.41
CHOWAN	20.02	3.04	0.15	0.98	1.26
CLAY	12.60	1.41	0.06	0.52	1.39
CLEVELAND	101.10	14.92	0.68	6.00	1.77
COLUMBUS	52.49	6.43	0.30	3.04	1.43
CRAVEN	130.55	25.39	1.10	7.17	2.83
CUMBERLAND	504.19	93.59	4.40	27.23	10.61
CURRITUCK	214.86	38.03	2.00	10.11	12.22

Table E: Alphabetical by County, 2015

2015 Impact of Travel on North Carolina					
Table E: Alphabetical by County, 2015 (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	1,052.69	223.03	12.71	50.48	47.03
DAVIDSON	155.06	22.27	1.00	8.72	5.02
DAVIE	34.73	6.40	0.29	1.95	0.62
DUPLIN	39.16	4.59	0.21	2.29	1.27
DURHAM	727.04	152.84	8.30	38.97	24.28
EDGECOMBE	55.98	7.87	0.36	3.13	0.99
FORSYTH	809.30	140.83	6.59	48.04	14.75
FRANKLIN	22.64	2.69	0.13	1.27	0.57
GASTON	241.57	39.14	1.89	13.87	3.96
GATES	6.21	0.55	0.02	0.39	0.23
GRAHAM	25.54	4.49	0.25	1.20	1.70
GRANVILLE	45.69	5.79	0.29	2.71	1.29
GREENE	5.60	0.56	0.03	0.32	0.20
GUILFORD	1,296.29	328.05	13.13	67.39	29.24
HALIFAX	89.72	10.99	0.53	5.57	2.17
HARNETT	80.41	11.72	0.60	4.44	1.86
HAYWOOD	167.56	35.76	1.71	9.29	6.24
HENDERSON	257.95	46.85	2.20	11.74	10.99
HERTFORD	27.73	3.59	0.18	1.67	0.70
HOKE	10.81	1.36	0.07	0.61	0.17
HYDE	33.54	6.61	0.38	1.59	1.82
IREDELL	233.80	37.10	1.82	12.92	7.11
JACKSON	175.92	41.53	1.71	9.79	8.04
JOHNSTON	221.72	34.65	1.77	12.46	5.55
JONES	3.99	0.55	0.02	0.25	0.12
LEE	71.64	12.87	0.62	4.15	1.44
LENOIR	81.11	13.82	0.61	4.56	1.57

Table E: Alphabetical by County, 2015

2015 Impact of Travel on North Carolina
Table E: Alphabetical by County, 2015

<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	52.38	8.61	0.38	2.92	1.56
MACON	154.23	27.28	1.26	6.95	12.22
MADISON	35.85	7.12	0.33	1.85	1.63
MARTIN	30.29	4.62	0.23	1.67	0.74
MCDOWELL	54.30	8.31	0.42	2.88	1.95
MECKLENBURG	5,037.90	1,725.89	49.87	238.87	122.42
MITCHELL	22.12	3.44	0.16	0.98	0.95
MONTGOMERY	27.65	2.86	0.11	1.29	2.83
MOORE	441.84	101.04	5.45	22.66	13.03
NASH	276.18	54.69	2.98	14.56	7.47
NEW HANOVER	520.86	121.05	5.84	25.37	20.80
NORTHAMPTON	13.64	1.61	0.05	0.62	1.16
ONSLow	216.18	40.85	1.75	11.39	8.14
ORANGE	184.45	35.50	1.82	9.98	3.97
PAMLICO	17.11	2.07	0.08	0.71	1.87
PASQUOTANK	59.47	9.25	0.49	3.30	1.34
PENDER	92.34	16.31	0.82	4.45	6.38
PERQUIMANS	9.80	1.21	0.04	0.41	1.11
PERSON	35.41	4.47	0.22	2.10	0.78
PITT	218.83	44.07	2.07	11.44	4.82
POLK	26.76	3.92	0.20	1.41	1.51
RANDOLPH	131.34	20.52	0.95	8.01	2.12
RICHMOND	46.91	8.50	0.42	2.50	0.88
ROBESON	137.88	21.04	1.11	8.05	2.73
ROCKINGHAM	67.65	11.35	0.55	3.60	1.63
ROWAN	160.47	26.83	1.36	8.55	5.15
RUTHERFORD	164.09	23.81	1.22	9.88	4.93

Table E: Alphabetical by County, 2015

2015 Impact of Travel on North Carolina						
Table E: Alphabetical by County, 2015 (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	48.29	6.36	0.29	2.73	1.53	
SCOTLAND	42.22	7.05	0.37	2.34	0.74	
STANLY	76.18	10.26	0.49	4.46	2.26	
STOKES	23.40	3.06	0.13	1.20	0.91	
SURRY	116.62	17.24	0.81	6.51	2.49	
SWAIN	193.21	56.02	2.13	12.08	4.25	
TRANSYLVANIA	88.86	16.47	0.77	3.45	4.06	
TYRRELL	3.57	0.35	0.02	0.17	0.34	
UNION	126.00	20.13	0.99	7.00	2.25	
VANCE	46.17	6.37	0.29	2.79	1.35	
WAKE	2,072.03	663.92	21.90	100.04	54.85	
WARREN	25.44	3.16	0.12	0.94	2.25	
WASHINGTON	14.69	1.97	0.09	0.83	0.62	
WATAUGA	231.44	52.24	2.64	11.61	9.03	
WAYNE	156.15	21.26	1.03	9.80	2.38	
WILKES	72.19	10.83	0.54	3.58	1.73	
WILSON	111.25	16.70	0.83	6.60	2.13	
YADKIN	36.16	6.36	0.35	1.95	0.88	
<u>YANCEY</u>	<u>34.73</u>	<u>5.76</u>	<u>0.24</u>	<u>1.56</u>	<u>2.43</u>	
STATE TOTALS	\$22,029.14	\$5,281.96	211.91	\$1,129.33	\$666.28	

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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 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 North Carolina.

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

Travel industry categories: With the transition to NAICS, the U.S. Travel Association has adjusted its selection 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. The industry groups and subcategories used in the model are outlined below, followed by a detailed table of NAICS Codes. The share of travel in each of listed industries will depend on travel spending estimates for the related categories and are different from industries and areas.

Automobile Transportation: Gasoline service stations, passenger car rental, motor vehicle/parts dealers, automotive repairs and maintenance.

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

Foodservice industry: Eating & drinking places, and grocery stores.

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

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

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."

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

Accommodations

- 7211 Traveler Accommodations
- 7212 Recreational Vehicle Parks & Campgrounds

Auto Transportation

- 532111 Passenger Car Rental
- 447 Gasoline Stations
- 4411 Automobile Dealers
- 4412 Other Motor Vehicle Dealers
- 4413 Automotive Parts, Accessories and Tire Stores
- 8111 Automotive Repair and Maintenance

Entertainment and Recreation

- 711 Performing Arts, Spectator Sports & Related Industries
- 712 Museums, Historical Sites & Similar Institutions
- 713 Amusement, Gambling & Recreation

Food

- 7221 Full service Restaurants
- 7222 Limited Service Eating Places
- 7224 Drinking Places
- 445 Food and Beverage stores

Public Transportation

- 481 Passenger Air Transportation
- 4881 Airport Support Activities
- 4821 Rail Transportation
- 4852 Interurban and Rural Bus Transportation
- 4853 Taxi & Limousine Services
- 485510 Charter Bus
- 483112 Deep Sea Passenger Transportation
- 483114 Coastal and Great Lakes Passenger Transportation
- 483212 Inland Water Passenger Transportation
- 487 Scenic & Sightseeing Transportation

Retail

- 451 Sporting Goods, Hobby, Book, and Music Stores
- 452 General Merchandise Stores
- 453 Miscellaneous Store Retailers
- 443 Electronics and Appliance Stores
- 444 Building Material and Garden Equipment and Supplies Dealers
- 446 Health and Personal Care Stores
- 448 Clothing and Clothing Accessories Stores

Travel Arrangement

- 5615 Travel Arrangement & Reservation Services (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 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
Visit North Carolina - a part of the Economic Development Partnership of North Carolina