

**The Economic Impact
Of Travel On
North Carolina Counties
2013**

A Study Prepared for the
**North Carolina Division of
Tourism, Film and Sports Development**
by the
U.S. Travel Association
Washington, D.C.
September 2014

PREFACE

This study was conducted by the Research Department of the U.S. Travel Association for the **North Carolina Division of Tourism, Film and Sports Development**. The study provides preliminary 2013 and 2012 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 2013 and 2012 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.

U.S. Travel Association
Washington, D.C.
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INTRODUCTION

This report presents preliminary 2013 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, 2012 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 2013 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 \$21.0 billion in North Carolina during 2013, up 4.1 percent from 2012.
- Domestic and international travelers' expenditures directly generated 206,700 jobs in 2013, up 2.4 percent from 2012. These jobs composed 5.1 percent of total state non-agricultural employment in 2013.
- Domestic and international travelers' expenditures generated \$4.8 billion in payroll income for North Carolina during 2013. This represented an increase of 5.0 percent from 2012.
- On average, every \$101,395 spent by domestic and international travelers in North Carolina during 2013 supported one job.
- Domestic and international travelers' expenditures in North Carolina directly generated nearly \$3.2 billion in tax revenue for federal, state and local governments in 2013, up 4.6 percent from 2012.
- In 2013, Mecklenburg County received more than \$4.6 billion in domestic travelers' expenditures to lead all of North Carolina's 100 counties. Wake County ranked second with almost \$1.9 billion, followed by Guilford County with \$1.2 billion.
- Forty of North Carolina's 100 counties received over \$100 million in domestic travelers' expenditures in 2013.
- Thirty four counties in North Carolina indicated one thousand or more jobs directly supported by domestic travelers during 2013.

NATIONAL SUMMARY 2013

The U.S. recovery grew at a moderate pace in the first part of 2013 before achieving more robust economic growth in the second part. Real GDP in the United States (in chained 2009 dollars) increased 2.2 percent annually in 2013, slightly slower than the 2.3 percent increase in 2012. However, when looking at the year as two halves, one can see that the first two quarters were rebounds from a sputtering end of 2012, and the last two quarters highlighted stronger growth particularly in business investment and exports.

For the year overall, consumer spending and service exports grew faster in 2013 than in 2012. These improvements, however, were more than offset by decelerations in investment spending and goods exports. As a result, the pace of real GDP growth in 2013 was only slightly slower than in 2012, despite the negative impacts of the third quarter government shutdown.

The U.S. employment situation continued to improve as well: non-farm employment increased by 2.3 million to 136 million jobs, with total travel-related employment counted at 14.9 million in 2013. This indicates that one in nine U.S. non-farm jobs directly or indirectly relies on the travel industry. This includes 7.9 million jobs directly supported by traveler spending in 2013, and 7.0 million jobs supported by secondary effects of traveler spending, be it through indirect (e.g., utility use for restaurants) or induced (e.g., spending from travel industry employees) means.

The Consumer Price Index (CPI) rose 1.5 percent in 2013 and U.S. Travel Association's Travel Price Index (TPI) increased at 0.9 percent during the same period. Decreased motor fuel price during 2013 is the major reason why the TPI grew at a slower rate than CPI.

U.S. economic growth slowed in the first quarter of 2014. Real GDP, in chained 2009 dollar, contracted by 2.1 percent (annualized) in the first quarter of 2014, a drop from the 3.5 percent increase in the fourth quarter of 2013. The primary reasons for this contraction were the polar vortex freezing consumer spending, downward revisions to government spending after the less-than-stellar rollout of the Affordable Care Act, and downward adjustments in business inventories. However, consumer spending in services has remained strong.

Through the first seven months of 2014, the unemployment rate decreased to 6.1 percent in July, and a total of nearly 1.5 million jobs have been added since December 2013. In July 2014, both CPI and TPI increased 2.0 percent compared with July 2013; air fare decreased 0.2 percent and motor fuel prices increased 1.0 percent and during the same period.

Table 1: Overall U.S. Economic Indicators, 2011-2013

<u>Sector</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
Nominal gross domestic product (\$Billions)	15,517.9	16,163.2	16,768.1
Real gross domestic product (\$ Billions)*	15,020.6	15,369.2	15,710.3
Real disposable personal income (\$Billions)*	11,324.6	11,551.6	11,637.0
Real personal consumption expenditures (\$Billions)*	10,291.3	10,517.6	10,727.9
Consumer price index**	224.9	229.6	233.0
Travel Price Index	266.9	273.0	275.6
Non-farm payroll employment (Millions)	131.8	134.1	136.4
Unemployment rate (%)	8.9	8.1	7.4
Percentage change from previous year			
Nominal gross domestic product	3.7%	4.2%	3.7%
Real gross domestic product	1.6%	2.3%	2.2%
Real disposable personal income	2.4%	2.0%	0.7%
Real personal consumption expenditures	2.5%	2.2%	2.0%
Consumer price index	3.2%	2.1%	1.5%
Travel Price Index	6.5%	2.3%	0.9%
Non-farm payroll employment	1.5%	1.7%	1.7%

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

* In chained 2009 dollars

** 1982-84=100

U.S. Travel Volume in 2013

U.S. domestic travel, including leisure and business travel increased 1.2 percent to a total of 2.1 billion person-trips in 2013. 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 1.4 percent in 2013, totaling 1.6 billion person-trips and is forecasted to increase 1.7 percent in 2014. Leisure travel accounted for 78.4 percent of all U.S. domestic travel in 2013. Domestic business travel grew 0.5 percent in 2013 to 445 million person-trips. International inbound travelers, including visitors from overseas, Canada and Mexico, made 69.8 million visits to the United States in 2013, up 4.2 percent from 2012.

Travel Expenditures in 2013

Domestic and international travel spending in the U.S. totaled \$887.9 billion, a 3.9 percent increase from 2012. Leisure traveler spending totaled \$621.4 billion and grew by 4.3 percent from 2012. Business traveler spending increased 3.2 percent over 2012 to \$266.5 billion in 2013. Of this total, meeting and convention travelers spent \$105.4 billion.

Domestic travelers directly spent \$748.3 billion in 2013, a 2.8 percent increase from 2012. This was the slowest increase during the current recovery period following the 2009 recession. Slower growth in 2013 was due to more moderate increases in both travel volume and travel prices than in prior years. Domestic travel expenditures are expected to accelerate in 2014 and increase 4.8 percent.

International travelers spent \$139.6 billion in the U.S. during 2013, up 10.6 percent from 2012. In addition, international travelers paid a total of \$41.6 billion to U.S. air carriers on international passenger fares in 2012, an increase of 5.8 percent from 2012. As a result, a \$57.1 billion travel trade surplus was generated in 2013, the largest surplus in the past 50 years and \$9.7 billion greater than the 2012 travel trade surplus. Without the travel trade surplus, the U.S. trade balance deficit would be 12% higher than its current \$474.9 billion. International traveler spending in the U.S. is estimated to increase 4.3 percent in 2014.

Increasing for a fourth consecutive year, real travel spending (in chained 2009 dollars) rose 3.0 percent in 2013. The price of travel goods and services increased only slightly in 2013 (0.9%), according to the U.S. Travel Association's Travel Price Index (TPI). Motor fuel prices declined from previous year for the first year since 2010. The TPI is expected to increase 2.7 in 2014.

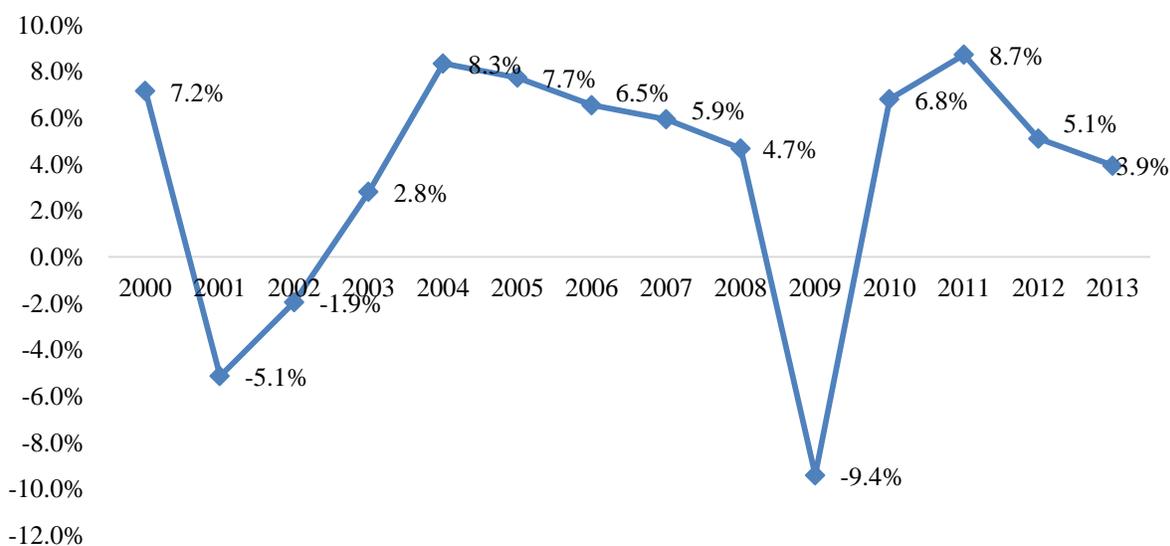
Table 2: Travel Expenditures - U.S. Nationwide

Category	2012 Spending (\$ Billions)			2013 Spending (\$ Billions)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	\$147.4	\$14.2	\$161.6	\$152.6	\$15.5	\$168.0
Auto Transportation	153.4	1.5	154.9	155.8	1.7	157.4
Lodging	122.8	34.9	157.7	127.8	39.7	167.5
Foodservice	174.2	26.7	200.9	179.6	29.7	209.2
Entertainment & Recreation	79.2	10.3	89.5	80.4	11.0	91.4
General Retail Trade	51.0	38.5	89.5	52.2	42.1	94.3
Total	\$728.0	\$126.2	\$854.2	\$748.3	\$139.6	\$887.9

Source: U.S. Travel Association

* Excludes international passenger fare payments.

**Changes of Direct Travel Expenditures*
in the U.S., 2001-2013p**



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

Travel Employment in 2013

The unemployment rate in the U.S. took another step down from its 9.6 percent peak in 2010. The 2013 unemployment rate dropped 0.7 percentage points from 2012 to 7.4 percent. Even with a 0.3 percent increase in the labor force, total non-farm employment in the U.S. increased 1.7 percent in 2013. This marks the third consecutive year of growth after three years of decline.

In the current recovery, travel has proven to be one of the most efficient job-creating engines of the U.S. economy. Accounting for 5.8 percent of total non-farm employment in the U.S., travel directly supported nearly 7.9 million U.S. jobs in 2013, an increase of 2.4 percent from 2012. The travel industry has created jobs at a faster rate (6.8%) than the rest of the economy (5.8%) since the overall employment recovery began in March of 2010. Travel is 8.2% of new jobs created in 2013.

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

Category	2012 Employment (Thousands)			2013 Employment (Thousands)		
	Domestic	Intl.*	Total	Domestic	Intl.*	Total
Public Transportation	896.3	67.2	963.4	887.2	69.1	956.3
Auto Transportation	257.4	2.0	259.4	263.7	2.1	265.8
Lodging	1,196.6	257.1	1,453.6	1,203.8	277.8	1,481.6
Foodservice	2,638.0	406.7	3,044.7	2,715.9	444.1	3,160.0
Entertainment & Recreation	1,090.2	217.9	1,308.2	1,110.5	231.4	1,341.9
General Retail Trade	319.7	164.2	483.8	320.2	171.1	491.4
Travel Planning	161.9	0.0	161.9	164.7	0.0	164.7
Total	6,560.1	1,115.1	7,675.2	6,666.0	1,195.7	7,861.7

Source: U.S. Travel Association

* Excludes jobs supported by international passenger fare payments.

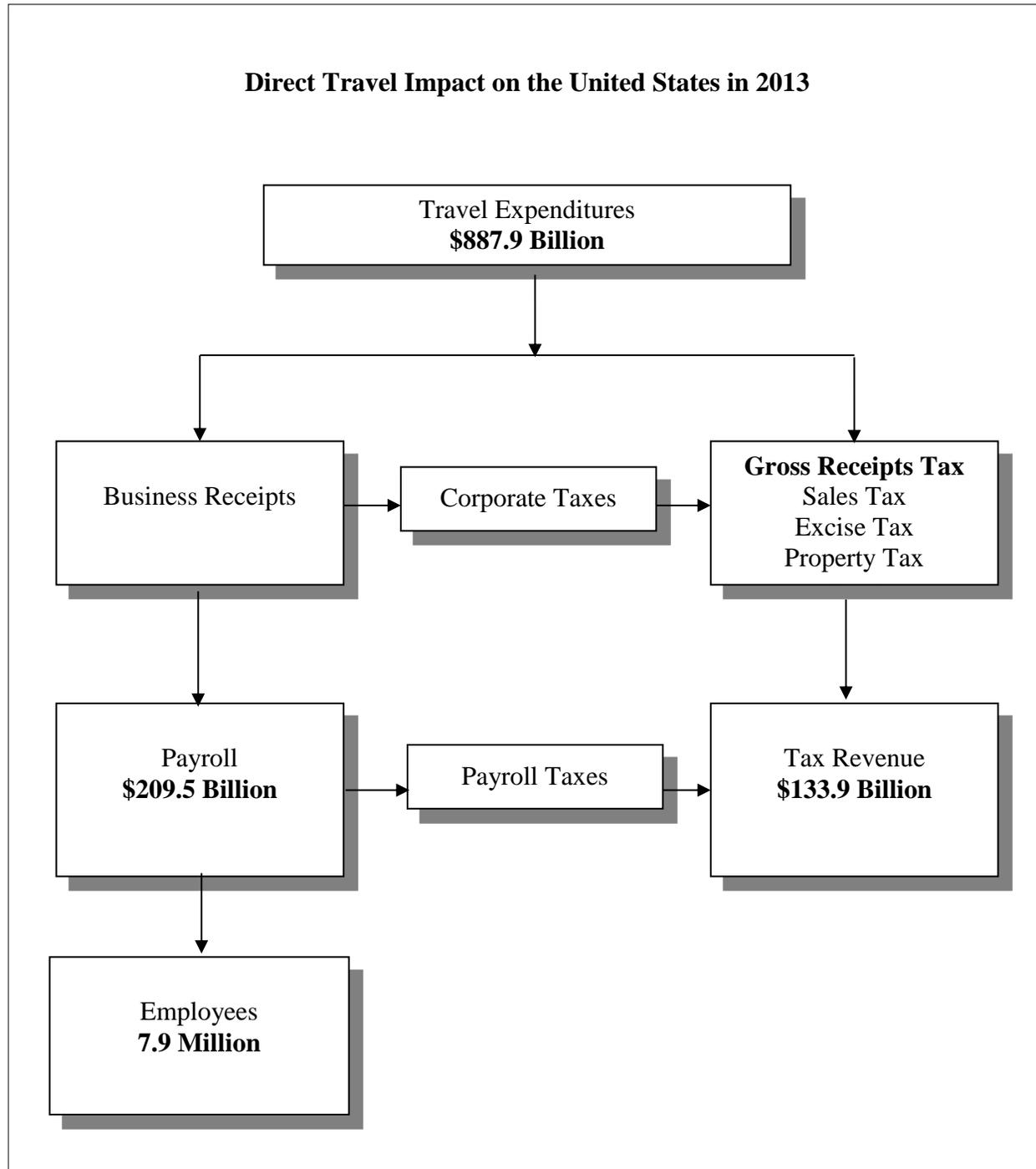
Table 4: U.S. Travel Forecasts

	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>
Real GDP (\$ Billions)	14,830.4	14,418.7	14,783.8	15,020.6	15,369.2	15,710.3	16,194.5	16,708.5	17,212.0	17,709.0
Unemployment Rate (%)	5.8	9.3	9.6	8.9	8.1	7.4	7.0	6.5	5.8	5.3
Consumer Price Index (CPI)*	215.3	214.6	218.1	224.9	229.6	233.0	237.0	241.7	246.6	251.8
Travel Price Index (TPI)	257.7	241.5	250.7	266.9	273.0	275.6	282.9	287.2	298.7	309.5
Total Travel Expenditures in U.S. (\$ Billions)	772.5	699.8	747.4	812.7	854.2	887.9	929.5	967.7	1,019.1	1,075.1
U.S. Residents	662.1	605.6	643.9	696.5	728.0	748.3	784.0	813.8	856.1	902.1
International Visitors**	110.4	94.2	103.5	116.1	126.2	139.6	145.6	153.9	163.1	173.0
Total International Visitors to the U.S. (Millions)	57.9	55.0	60.0	62.7	67.0	69.8	72.2	75.1	78.1	81.0
Overseas Arrivals the U.S. (Millions)	25.3	23.8	26.4	27.9	29.8	32.0	33.7	35.7	37.5	39.4
Total Domestic Person-Trips (Millions)	1,964.9	1,900.1	1,963.7	1,997.5	2,030.3	2,055.4	2,090.3	2,125.1	2,157.1	2,193.1
Business	461.1	434.3	446.4	441.3	442.1	444.5	451.6	458.0	463.0	467.3
Leisure	1,503.8	1,465.8	1,517.3	1,556.2	1,588.2	1,610.9	1,638.7	1,667.2	1,694.1	1,725.8
Percent Change from Previous Year (%)										
Real GDP	-0.3	-2.8	2.5	1.8	2.8	1.9	3.1	3.2	3.0	2.9
Consumer Price Index (CPI)*	3.8	-0.3	1.6	3.1	2.1	1.5	1.7	2.0	2.1	2.1
Travel Price Index (TPI)	5.6	-6.3	3.8	6.5	2.3	0.9	2.7	1.5	4.0	3.6
Total Travel Expenditures in U.S.	4.7	-9.4	6.8	8.7	5.1	3.9	4.7	4.1	5.3	5.5
U.S. Residents	3.4	-8.5	6.3	8.2	4.5	2.8	4.8	3.8	5.2	5.4
International Visitors**	13.4	-14.7	9.9	12.2	8.7	10.6	4.3	5.7	6.0	6.1
Total International Visitors to the U.S.	3.5	-5.2	9.2	4.5	6.8	4.2	3.5	4.1	3.9	3.8
Overseas Arrivals the U.S.	6.1	-6.3	11.0	5.8	6.7	7.7	5.3	5.7	5.3	5.0
Total Domestic Person-Trips	-2.0	-3.3	3.3	1.7	1.6	1.2	1.7	1.7	1.5	1.7
Business	-6.7	-5.8	2.8	-1.1	0.2	0.5	1.6	1.4	1.1	0.9
Leisure	-0.4	-2.5	3.5	2.6	2.1	1.4	1.7	1.7	1.6	1.9

Sources: U.S. Travel Association

*1982-84=100.

** International traveler spending does not include international passenger fares.



Source: U.S. Travel Association, BEA

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

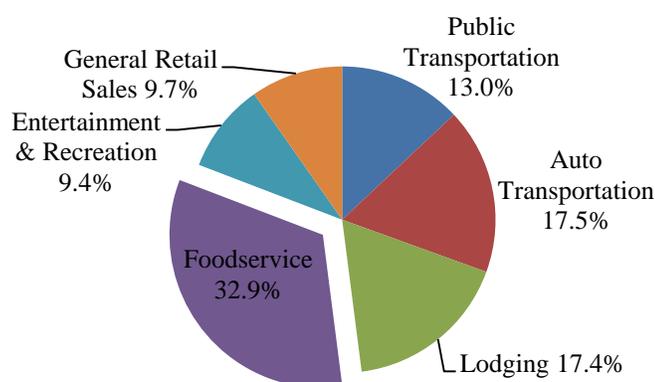
DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA

TRAVEL IMPACT ON NORTH CAROLINA - 2013

Travel Expenditures

- Domestic and international travelers in North Carolina directly spent almost \$21.0 billion during 2013 on transportation, lodging, food, entertainment and recreation, and retail trade, representing a 4.1 percent increase from 2012. Domestic traveler expenditures reached \$20.2 billion in 2013, up 4.2 percent from 2012, while international traveler expenditures increased to \$744.7 million, up 3.5 percent from 2012.
- In 2013, foodservice, the largest domestic traveler spending sector in North Carolina, reached more than \$6.6 billion and accounted for nearly one third (32.9%) of the state total domestic travelers' expenditures, up 4.3 percent from 2012.
- Domestic traveler expenditures on auto transportation ranked second with \$3.5 billion, 17.5 percent of the state total, up 2.8 percent from 2012.
- Domestic travelers spent \$3.5 billion on lodging, up 5.0 percent from 2012.
- Domestic traveler spending on public transportation reached \$2.6 billion, up 6.3 percent from 2012.

**Domestic Travel Expenditures
in North Carolina
by Industry Sector, 2013**



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

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

<i>2013 Expenditures</i>	Total (\$ Millions)	% of Domestic Total
Public Transportation	\$2,625.6	13.0%
Auto Transportation	3,547.5	17.5%
Lodging	3,525.5	17.4%
Foodservice	6,642.6	32.9%
Entertainment & Recreation	1,910.6	9.4%
General Retail Sales	1,966.8	9.7%
Domestic Total	20,218.6	100.0%
International Total	744.7	
Grand Total	\$20,963.3	
<i>2012 Expenditures</i>		
Public Transportation	\$2,469.7	12.7%
Auto Transportation	3,451.4	17.8%
Lodging	3,358.8	17.3%
Foodservice	6,369.4	32.8%
Entertainment & Recreation	1,861.4	9.6%
General Retail Sales	1,899.0	9.8%
Domestic Total	19,409.8	100.0%
International Total	719.7	
Grand Total	\$20,129.6	
<i>Percentage Change 2013 over 2012</i>		
Public Transportation	6.3%	
Auto Transportation	2.8%	
Lodging	5.0%	
Foodservice	4.3%	
Entertainment & Recreation	2.6%	
General Retail Sales	3.6%	
Domestic Total	4.2%	
International Total	3.5%	
Grand Total	4.1%	

Source: U.S. Travel Association

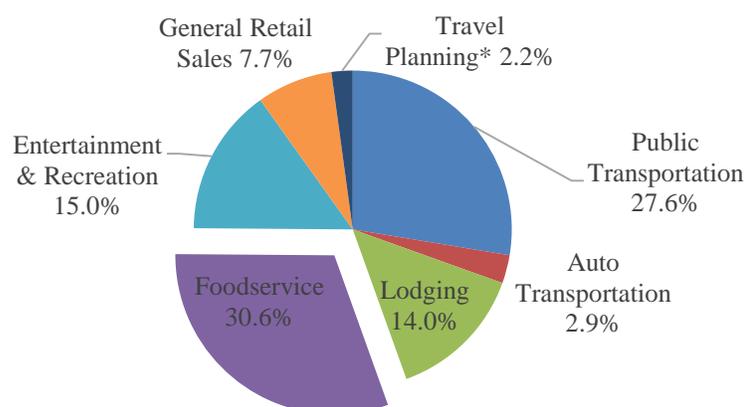
TRAVEL IMPACT ON NORTH CAROLINA - 2013

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 \$4.8 billion in 2013, up 5.0 percent from 2012.
- In 2013, domestic traveler expenditures generated \$4.6 billion payroll income in North Carolina, a 5.0 percent increase from 2012, while international traveler expenditures generated \$203.8 million in payroll income, up 4.2 percent over 2012.
- On average in 2013, every dollar spent by domestic travelers in North Carolina produced 23 cents in wage and salary income.
- The foodservice sector, the largest payroll income sector among seven payroll sectors reported in this report, posted \$1.4 billion in payroll income generated by domestic travel in 2013.

**Domestic Travel Expenditures
Generated Payroll in North Carolina
by Industry Sector, 2013**



Travel-Generated Payroll

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

<i>2013 Payroll</i>	Total (\$ Millions)	% of Total
Public Transportation	\$1,272.8	27.6%
Auto Transportation	132.7	2.9%
Lodging	647.5	14.0%
Foodservice	1,411.1	30.6%
Entertainment & Recreation	692.2	15.0%
General Retail Sales	355.9	7.7%
Travel Planning*	99.2	2.2%
Domestic Total	4,611.4	100.0%
International Total	203.8	
Grand Total	\$4,815.2	
<i>2012 Payroll</i>		
Public Transportation	\$1,175.4	26.8%
Auto Transportation	128.2	2.9%
Lodging	631.0	14.4%
Foodservice	1,352.1	30.8%
Entertainment & Recreation	668.1	15.2%
General Retail Sales	342.8	7.8%
Travel Planning*	93.6	2.1%
Domestic Total	4,391.3	100.0%
International Total	195.6	
Grand Total	\$4,586.9	
<i>Percentage Change 2013 over 2012</i>		
Public Transportation	8.3%	
Auto Transportation	3.5%	
Lodging	2.6%	
Foodservice	4.4%	
Entertainment & Recreation	3.6%	
General Retail Sales	3.8%	
Travel Planning*	6.0%	
Domestic Total	5.0%	
International Total	4.2%	
Grand Total	5.0%	

Source: U.S. Travel Association

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

TRAVEL IMPACT ON NORTH CAROLINA - 2013

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 2013, domestic and international traveler spending in North Carolina generated 206,700 jobs directly, including full-time and seasonal/part-time positions in the state, up 2.4 percent from 2012.
- On average, every \$101,395 spent by domestic and international travelers in North Carolina supported one job during 2013.
- In 2013, domestic traveler expenditures generated 198,300 jobs, a 2.4 percent increase from 2012, while international traveler expenditures directly generated 8,500 jobs, up 2.0 percent from 2012.
- It is important to note that these travel-related jobs composed 5.1 percent of total non-agricultural employment in North Carolina during 2013. Without these jobs, North Carolina's 2013 unemployment rate of 8.0 percent would have been 4.4 percentage points higher, or the equivalent of 12.4 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 2013, domestic traveler spending in this sector supported 89,300 jobs, accounting for 45.1 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.

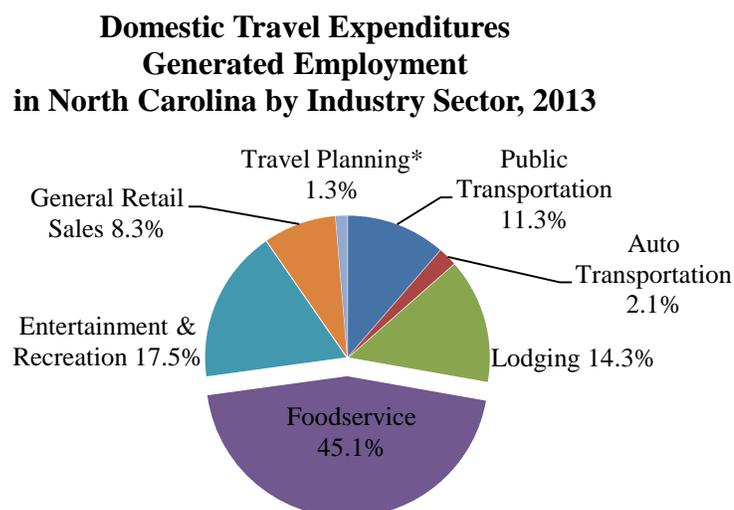


Table 7: Direct Travel-Generated Employment in North Carolina by Industry Sector

<i>2013 Employment</i>	Total (thousands)	% of Total
Public Transportation	22.5	11.3%
Auto Transportation	4.2	2.1%
Lodging	28.3	14.3%
Foodservice	89.3	45.1%
Entertainment & Recreation	34.7	17.5%
General Retail Sales	16.4	8.3%
Travel Planning*	2.7	1.3%
Domestic Total	198.3	100.0%
International Total	8.5	
Grand Total	206.7	
<i>2012 Employment</i>		
Public Transportation	22.9	11.8%
Auto Transportation	4.2	2.1%
Lodging	28.1	14.5%
Foodservice	85.7	44.3%
Entertainment & Recreation	33.9	17.5%
General Retail Sales	16.2	8.4%
Travel Planning*	2.6	1.4%
Domestic Total	193.6	100.0%
International Total	8.3	
Grand Total	201.9	
<i>Percentage Change 2013 over 2012</i>		
Public Transportation	-1.9%	
Auto Transportation	2.2%	
Lodging	0.8%	
Foodservice	4.2%	
Entertainment & Recreation	2.6%	
General Retail Sales	1.4%	
Travel Planning*	2.2%	
Domestic Total	2.4%	
International Total	2.0%	
Grand Total	2.4%	

Source: U.S. Travel Association

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

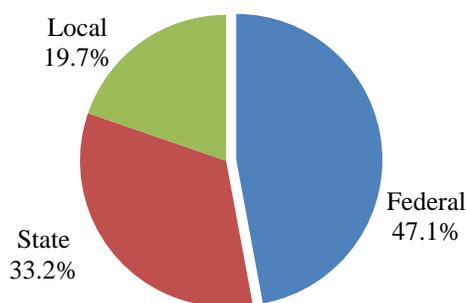
TRAVEL IMPACT ON NORTH CAROLINA - 2013

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 2013, total tax revenue, including federal, state and local taxes, generated by domestic and international traveler spending in North Carolina was close to \$3.2 billion, up 4.6 percent from 2012. Among this total, \$3.1 billion was directly generated by domestic travel, up 4.6 percent from 2012, and \$114.9 million was generated by international traveler expenditures in the North Carolina, a 3.8 percent increase from 2012.
- Domestic traveler spending in North Carolina generated \$1.4 billion for the federal government in 2013, up 5.0 percent from 2012. This represents 47.1 percent of all domestic travel-generated tax collections in the state. Each dollar spent by domestic travelers in North Carolina produced 7.1 cents for federal tax coffers.
- Spending by domestic travelers in North Carolina generated \$1.0 billion in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This composed 33.2 percent of all domestic travel-generated tax revenue collected in the state for 2013. On average, each travel dollar produced 5.0 cents in state tax receipts.
- During 2013, domestic traveler spending in North Carolina generated \$601.2 million for local government, up 3.8 percent from 2012. This represents 19.7 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, 2013**



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

<i>2013 Tax Revenue</i>	Total (\$ Millions)	% of Total
Federal	\$1,436.6	47.1%
State	1,013.3	33.2%
Local	601.2	19.7%
Domestic Total	3,051.1	100.0%
International Total	114.9	
Grand Total	\$3,166.0	
<i>2012 Tax Revenue</i>		
Federal	\$1,367.6	46.9%
State	970.4	33.3%
Local	579.4	19.9%
Domestic Total	2,917.4	100.0%
International Total	110.7	
Grand Total	\$3,028.1	
<i>Percentage Change 2013 over 2012</i>		
Federal	5.0%	
State	4.4%	
Local	3.8%	
Domestic Total	4.6%	
International Total	3.8%	
Grand Total	4.6%	

Source: U.S. Travel Association

DOMESTIC TRAVEL IMPACT ON NORTH CAROLINA COUNTIES-2013

During 2013, domestic travelers spent \$20.2 billion while traveling in North Carolina, up 4.2 percent from 2012. These expenditures directly generated \$4.6 billion in payroll income and 198,300 jobs. The federal government received \$1.4 billion in tax revenue through the domestic travel industry in North Carolina in 2013. Additionally, domestic traveler expenditures generated \$1.0 billion in tax revenue for the state treasury and \$601.2 million tax revenue for local governments during 2013.

Travel expenditures occurred throughout all the one hundred counties in North Carolina. The top five counties in North Carolina received close to \$9.6 billion in direct domestic travel expenditures during 2013, 47.3 percent of the state total. Direct domestic traveler spending in the top five counties generated nearly \$2.8 billion in payroll income and supported 100,800 jobs in 2013.

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 2013. Domestic traveler spending in Mecklenburg County was more than \$4.6 billion, accounting for 22.8 percent of the state total. These expenditures generated \$1.5 billion in payroll income and supported 46,500 jobs for county economy in 2013.

Wake County ranked second with \$1.9 billion in domestic traveler spending in 2013, representing 9.3 percent of the state total. The payroll income and jobs directly attributable to domestic traveler spending reached \$572.9 million and 20,300 jobs.

Guilford County posted \$1.2 billion in domestic traveler expenditures to rank third. These expenditures generated \$290.0 million in payroll income as well as 12,400 jobs within the county in 2013.

Dare County received \$953.0 million from domestic travelers in 2013. These domestic traveler expenditures benefited county with \$191.7 million in payroll income and 11,800 jobs.

Buncombe County ranked fifth with \$901.3 million in direct domestic traveler expenditures during 2013. These receipts from domestic travelers generated \$190.2 million in payroll income and 9,800 jobs.

Top Five Counties

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

<i>2013 Travel Impact</i>					
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
MECKLENBURG	\$4,610.0	\$1,506.2	46.5	\$214.8	\$110.9
WAKE	1,883.0	572.9	20.3	89.1	49.5
GUILFORD	1,206.7	290.0	12.4	61.2	26.8
DARE	953.0	191.7	11.8	44.8	42.6
BUNCOMBE	901.3	190.2	9.8	44.9	29.1
FIVE COUNTY TOTAL	\$9,554.1	\$2,751.0	100.8	\$454.8	\$258.9
STATE TOTALS	\$20,218.6	\$4,611.4	198.3	\$1,013.3	\$601.2
FIVE COUNTY SHARE	47.3%	59.7%	50.8%	44.9%	43.1%
<i>2012 Travel Impact</i>					
MECKLENBURG	\$4,404.9	\$1,428.1	45.2	\$205.1	\$107.3
WAKE	1,791.6	544.4	19.7	84.7	47.7
GUILFORD	1,159.2	276.4	12.2	58.6	25.9
DARE	926.3	184.9	11.6	43.3	41.4
BUNCOMBE	834.2	175.4	9.3	41.5	27.4
FIVE COUNTY TOTAL	\$9,116.3	\$2,609.2	98.0	\$433.4	\$249.7
STATE TOTALS	\$19,409.8	\$4,391.3	193.6	\$970.4	\$579.4
FIVE COUNTY SHARE	47.0%	59.4%	50.6%	44.7%	43.1%
<i>Percent Change 2013 over 2012</i>					
MECKLENBURG	4.7%	5.5%	2.9%	4.7%	3.3%
WAKE	5.1%	5.2%	3.1%	5.2%	3.8%
GUILFORD	4.1%	4.9%	2.4%	4.4%	3.4%
DARE	2.9%	3.7%	1.2%	3.2%	3.0%
BUNCOMBE	8.0%	8.5%	5.0%	8.1%	6.1%
FIVE COUNTY TOTAL	4.8%	5.4%	2.9%	4.9%	3.7%
STATE TOTALS	4.2%	5.0%	2.4%	4.4%	3.8%

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 2013 and 2012. The estimates presented are for direct domestic travel expenditures and related economic impact.

- Table A shows the counties listed alphabetically, with 2013 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 2013 travel expenditures from highest to lowest.
- Table C shows the percent distribution for each impact measure in 2013.
- Table D shows the percent change in 2013 over 2012 estimates for each of the measures of economic impact.
- Table E shows the counties listed alphabetically, with 2012 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue for each.

Table A: Alphabetical By County, 2013

2013 Impact of Travel on North Carolina					
Table A: Alphabetical by County, 2013					
<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	\$163.80	\$25.39	1.31	\$9.36	\$2.78
ALEXANDER	18.12	2.60	0.11	0.98	0.73
ALLEGHANY	22.00	3.84	0.18	1.03	1.45
ANSON	16.19	1.92	0.10	0.92	0.39
ASHE	47.71	6.83	0.37	2.41	2.52
AVERY	104.97	23.32	1.18	5.16	4.57
BEAUFORT	70.99	8.97	0.43	3.53	4.14
BERTIE	12.73	1.23	0.05	0.69	0.69
BLADEN	36.42	3.73	0.19	2.14	1.01
BRUNSWICK	470.58	85.71	5.03	21.38	28.24
BUNCOMBE	901.28	190.21	9.79	44.93	29.07
BURKE	86.59	12.20	0.66	4.67	2.39
CABARRUS	371.87	80.08	3.98	20.85	6.51
CALDWELL	47.89	7.00	0.33	2.56	1.44
CAMDEN	1.92	0.21	0.01	0.10	0.15
CARTERET	302.77	52.93	3.06	13.38	17.76
CASWELL	7.96	0.80	0.04	0.37	0.55
CATAWBA	232.04	40.82	2.15	12.48	6.72
CHATHAM	30.77	3.59	0.17	1.77	0.55
CHEROKEE	37.03	5.48	0.30	1.72	2.15
CHOWAN	18.72	2.70	0.14	0.89	1.15
CLAY	12.51	1.33	0.06	0.51	1.36
CLEVELAND	91.95	12.89	0.63	5.32	1.58
COLUMBUS	49.59	5.77	0.29	2.78	1.32
CRAVEN	120.75	22.30	1.03	6.48	2.59
CUMBERLAND	471.99	84.94	4.22	24.81	9.73
CURRITUCK	137.71	25.08	1.50	5.79	6.28

Table A: Alphabetical By County, 2013

2013 Impact of Travel on North Carolina					
Table A: Alphabetical by County, 2013 (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	953.04	191.73	11.75	44.76	42.64
DAVIDSON	142.77	19.47	0.94	7.81	4.49
DAVIE	33.60	5.88	0.28	1.82	0.57
DUPLIN	36.96	4.12	0.20	2.10	1.17
DURHAM	657.17	131.18	7.64	34.45	21.50
EDGECOMBE	53.58	7.15	0.35	2.91	0.92
FORSYTH	753.77	124.54	6.26	43.46	13.44
FRANKLIN	21.05	2.38	0.12	1.14	0.52
GASTON	221.66	34.10	1.76	12.41	3.59
GATES	6.02	0.50	0.02	0.36	0.22
GRAHAM	24.84	4.16	0.25	1.14	1.62
GRANVILLE	44.43	5.34	0.29	2.52	1.20
GREENE	5.45	0.52	0.03	0.30	0.19
GUILFORD	1,206.74	289.97	12.45	61.20	26.77
HALIFAX	84.29	9.80	0.51	5.07	1.99
HARNETT	74.55	10.32	0.56	4.00	1.64
HAYWOOD	155.38	31.48	1.61	8.42	5.69
HENDERSON	233.25	40.52	2.05	10.37	9.85
HERTFORD	26.19	3.22	0.17	1.53	0.64
HOKE	10.76	1.29	0.07	0.59	0.16
HYDE	32.36	6.06	0.37	1.50	1.71
IREDELL	212.61	32.04	1.69	11.47	6.43
JACKSON	163.03	36.55	1.61	8.94	7.37
JOHNSTON	204.51	30.35	1.66	11.19	5.04
JONES	3.91	0.52	0.02	0.23	0.12
LEE	67.99	11.60	0.60	3.82	1.32
LENOIR	79.93	12.93	0.62	4.36	1.50

Table A: Alphabetical By County, 2013

2013 Impact of Travel on North Carolina						
Table A: Alphabetical by County, 2013 (Continued)						
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)	
LINCOLN	48.28	7.54	0.36	2.62	1.41	
MACON	140.85	23.66	1.18	6.21	11.08	
MADISON	32.83	6.19	0.31	1.66	1.48	
MARTIN	28.96	4.20	0.22	1.55	0.69	
MCDOWELL	50.76	7.37	0.40	2.61	1.79	
MECKLENBURG	4,610.04	1,506.21	46.53	214.78	110.87	
MITCHELL	21.06	3.11	0.16	0.91	0.89	
MONTGOMERY	25.58	2.52	0.11	1.16	2.57	
MOORE	409.97	89.43	5.14	20.58	12.10	
NASH	257.73	48.62	2.83	13.24	6.81	
NEW HANOVER	477.68	105.41	5.46	22.82	19.02	
NORTHAMPTON	13.09	1.47	0.05	0.57	1.08	
ONSLOW	210.49	37.77	1.73	10.70	7.70	
ORANGE	168.59	31.00	1.70	8.94	3.57	
PAMLICO	16.24	1.87	0.08	0.66	1.75	
PASQUOTANK	55.04	8.13	0.46	2.97	1.22	
PENDER	84.18	14.12	0.76	3.97	5.80	
PERQUIMANS	9.83	1.15	0.04	0.40	1.08	
PERSON	32.81	3.94	0.21	1.89	0.71	
PITT	205.67	39.33	1.98	10.46	4.45	
POLK	23.30	3.24	0.18	1.19	1.28	
RANDOLPH	124.53	18.47	0.92	7.36	1.96	
RICHMOND	44.20	7.61	0.40	2.29	0.81	
ROBESON	127.57	18.49	1.05	7.24	2.48	
ROCKINGHAM	61.81	9.85	0.51	3.21	1.48	
ROWAN	145.28	23.06	1.25	7.56	4.62	
RUTHERFORD	150.51	20.73	1.14	8.80	4.43	

Table A: Alphabetical By County, 2013

2013 Impact of Travel on North Carolina						
Table A: Alphabetical by County, 2013 (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	46.11	5.77	0.28	2.52	1.42	
SCOTLAND	39.20	6.22	0.35	2.12	0.67	
STANLY	70.68	9.04	0.46	4.02	2.05	
STOKES	22.15	2.75	0.13	1.11	0.85	
SURRY	110.66	15.53	0.78	6.00	2.30	
SWAIN	187.99	51.75	2.11	11.49	3.95	
TRANSYLVANIA	84.26	14.83	0.74	3.20	3.75	
TYRRELL	3.46	0.32	0.01	0.16	0.32	
UNION	112.76	17.10	0.91	6.12	2.01	
VANCE	42.83	5.61	0.28	2.50	1.22	
WAKE	1,883.01	572.89	20.27	89.11	49.53	
WARREN	25.65	3.03	0.13	0.92	2.19	
WASHINGTON	14.36	1.83	0.09	0.78	0.59	
WATAUGA	216.72	46.45	2.52	10.64	8.32	
WAYNE	147.46	19.06	0.99	8.93	2.18	
WILKES	67.48	9.62	0.51	3.24	1.58	
WILSON	104.04	14.83	0.80	5.98	1.94	
YADKIN	33.39	5.57	0.33	1.76	0.80	
<u>YANCEY</u>	<u>32.78</u>	<u>5.17</u>	<u>0.23</u>	<u>1.44</u>	<u>2.27</u>	
STATE TOTALS	\$20,218.58	\$4,611.36	198.27	\$1,013.28	\$601.22	

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Table B: Ranking Of Counties By Expenditure Levels, 2013

2013 Impact of Travel on North Carolina					
Table B: Ranking of Counties by Expenditure Levels, 2013					
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
MECKLENBURG	\$4,610.04	\$1,506.21	46.53	\$214.78	\$110.87
WAKE	1,883.01	572.89	20.27	89.11	49.53
GUILFORD	1,206.74	289.97	12.45	61.20	26.77
DARE	953.04	191.73	11.75	44.76	42.64
BUNCOMBE	901.28	190.21	9.79	44.93	29.07
FORSYTH	753.77	124.54	6.26	43.46	13.44
DURHAM	657.17	131.18	7.64	34.45	21.50
NEW HANOVER	477.68	105.41	5.46	22.82	19.02
CUMBERLAND	471.99	84.94	4.22	24.81	9.73
BRUNSWICK	470.58	85.71	5.03	21.38	28.24
MOORE	409.97	89.43	5.14	20.58	12.10
CABARRUS	371.87	80.08	3.98	20.85	6.51
CARTERET	302.77	52.93	3.06	13.38	17.76
NASH	257.73	48.62	2.83	13.24	6.81
HENDERSON	233.25	40.52	2.05	10.37	9.85
CATAWBA	232.04	40.82	2.15	12.48	6.72
GASTON	221.66	34.10	1.76	12.41	3.59
WATAUGA	216.72	46.45	2.52	10.64	8.32
IREDELL	212.61	32.04	1.69	11.47	6.43
ONslow	210.49	37.77	1.73	10.70	7.70
PITT	205.67	39.33	1.98	10.46	4.45
JOHNSTON	204.51	30.35	1.66	11.19	5.04
SWAIN	187.99	51.75	2.11	11.49	3.95
ORANGE	168.59	31.00	1.70	8.94	3.57
ALAMANCE	163.80	25.39	1.31	9.36	2.78
JACKSON	163.03	36.55	1.61	8.94	7.37
HAYWOOD	155.38	31.48	1.61	8.42	5.69

Table B: Ranking Of Counties By Expenditure Levels, 2013

2013 Impact of Travel on North Carolina					
Table B: Ranking of Counties by Expenditure Levels, 2013 (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>
RUTHERFORD	150.51	20.73	1.14	8.80	4.43
WAYNE	147.46	19.06	0.99	8.93	2.18
ROWAN	145.28	23.06	1.25	7.56	4.62
DAVIDSON	142.77	19.47	0.94	7.81	4.49
MACON	140.85	23.66	1.18	6.21	11.08
CURRITUCK	137.71	25.08	1.50	5.79	6.28
ROBESON	127.57	18.49	1.05	7.24	2.48
RANDOLPH	124.53	18.47	0.92	7.36	1.96
CRAVEN	120.75	22.30	1.03	6.48	2.59
UNION	112.76	17.10	0.91	6.12	2.01
SURRY	110.66	15.53	0.78	6.00	2.30
AVERY	104.97	23.32	1.18	5.16	4.57
WILSON	104.04	14.83	0.80	5.98	1.94
CLEVELAND	91.95	12.89	0.63	5.32	1.58
BURKE	86.59	12.20	0.66	4.67	2.39
HALIFAX	84.29	9.80	0.51	5.07	1.99
TRANSYLVANIA	84.26	14.83	0.74	3.20	3.75
PENDER	84.18	14.12	0.76	3.97	5.80
LENOIR	79.93	12.93	0.62	4.36	1.50
HARNETT	74.55	10.32	0.56	4.00	1.64
BEAUFORT	70.99	8.97	0.43	3.53	4.14
STANLY	70.68	9.04	0.46	4.02	2.05
LEE	67.99	11.60	0.60	3.82	1.32
WILKES	67.48	9.62	0.51	3.24	1.58
ROCKINGHAM	61.81	9.85	0.51	3.21	1.48
PASQUOTANK	55.04	8.13	0.46	2.97	1.22
EDGECOMBE	53.58	7.15	0.35	2.91	0.92

Table B: Ranking Of Counties By Expenditure Levels, 2013

2013 Impact of Travel on North Carolina					
Table B: Ranking of Counties by Expenditure Levels, 2013 (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	50.76	7.37	0.40	2.61	1.79
COLUMBUS	49.59	5.77	0.29	2.78	1.32
LINCOLN	48.28	7.54	0.36	2.62	1.41
CALDWELL	47.89	7.00	0.33	2.56	1.44
ASHE	47.71	6.83	0.37	2.41	2.52
SAMPSON	46.11	5.77	0.28	2.52	1.42
GRANVILLE	44.43	5.34	0.29	2.52	1.20
RICHMOND	44.20	7.61	0.40	2.29	0.81
VANCE	42.83	5.61	0.28	2.50	1.22
SCOTLAND	39.20	6.22	0.35	2.12	0.67
CHEROKEE	37.03	5.48	0.30	1.72	2.15
DUPLIN	36.96	4.12	0.20	2.10	1.17
BLADEN	36.42	3.73	0.19	2.14	1.01
DAVIE	33.60	5.88	0.28	1.82	0.57
YADKIN	33.39	5.57	0.33	1.76	0.80
MADISON	32.83	6.19	0.31	1.66	1.48
PERSON	32.81	3.94	0.21	1.89	0.71
YANCEY	32.78	5.17	0.23	1.44	2.27
HYDE	32.36	6.06	0.37	1.50	1.71
CHATHAM	30.77	3.59	0.17	1.77	0.55
MARTIN	28.96	4.20	0.22	1.55	0.69
HERTFORD	26.19	3.22	0.17	1.53	0.64
WARREN	25.65	3.03	0.13	0.92	2.19
MONTGOMERY	25.58	2.52	0.11	1.16	2.57
GRAHAM	24.84	4.16	0.25	1.14	1.62
POLK	23.30	3.24	0.18	1.19	1.28
STOKES	22.15	2.75	0.13	1.11	0.85

Table B: Ranking Of Counties By Expenditure Levels, 2013

2013 Impact of Travel on North Carolina						
Table B: Ranking of Counties by Expenditure Levels, 2013 (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	22.00	3.84	0.18	1.03	1.45	
MITCHELL	21.06	3.11	0.16	0.91	0.89	
FRANKLIN	21.05	2.38	0.12	1.14	0.52	
CHOWAN	18.72	2.70	0.14	0.89	1.15	
ALEXANDER	18.12	2.60	0.11	0.98	0.73	
PAMLICO	16.24	1.87	0.08	0.66	1.75	
ANSON	16.19	1.92	0.10	0.92	0.39	
WASHINGTON	14.36	1.83	0.09	0.78	0.59	
NORTHAMPTON	13.09	1.47	0.05	0.57	1.08	
BERTIE	12.73	1.23	0.05	0.69	0.69	
CLAY	12.51	1.33	0.06	0.51	1.36	
HOKE	10.76	1.29	0.07	0.59	0.16	
PERQUIMANS	9.83	1.15	0.04	0.40	1.08	
CASWELL	7.96	0.80	0.04	0.37	0.55	
GATES	6.02	0.50	0.02	0.36	0.22	
GREENE	5.45	0.52	0.03	0.30	0.19	
JONES	3.91	0.52	0.02	0.23	0.12	
TYRRELL	3.46	0.32	0.01	0.16	0.32	
<u>CAMDEN</u>	<u>1.92</u>	<u>0.21</u>	<u>0.01</u>	<u>0.10</u>	<u>0.15</u>	
STATE TOTALS	\$20,218.58	\$4,611.36	198.27	\$1,013.28	\$601.22	

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Table C: Percent Distribution By County, 2013

2013 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2013					
County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ALAMANCE	0.81%	0.55%	0.66%	0.92%	0.46%
ALEXANDER	0.09%	0.06%	0.06%	0.10%	0.12%
ALLEGHANY	0.11%	0.08%	0.09%	0.10%	0.24%
ANSON	0.08%	0.04%	0.05%	0.09%	0.07%
ASHE	0.24%	0.15%	0.19%	0.24%	0.42%
AVERY	0.52%	0.51%	0.60%	0.51%	0.76%
BEAUFORT	0.35%	0.19%	0.21%	0.35%	0.69%
BERTIE	0.06%	0.03%	0.03%	0.07%	0.11%
BLADEN	0.18%	0.08%	0.09%	0.21%	0.17%
BRUNSWICK	2.33%	1.86%	2.53%	2.11%	4.70%
BUNCOMBE	4.46%	4.12%	4.94%	4.43%	4.84%
BURKE	0.43%	0.26%	0.33%	0.46%	0.40%
CABARRUS	1.84%	1.74%	2.01%	2.06%	1.08%
CALDWELL	0.24%	0.15%	0.17%	0.25%	0.24%
CAMDEN	0.01%	0.00%	0.00%	0.01%	0.03%
CARTERET	1.50%	1.15%	1.54%	1.32%	2.95%
CASWELL	0.04%	0.02%	0.02%	0.04%	0.09%
CATAWBA	1.15%	0.89%	1.08%	1.23%	1.12%
CHATHAM	0.15%	0.08%	0.09%	0.18%	0.09%
CHEROKEE	0.18%	0.12%	0.15%	0.17%	0.36%
CHOWAN	0.09%	0.06%	0.07%	0.09%	0.19%
CLAY	0.06%	0.03%	0.03%	0.05%	0.23%
CLEVELAND	0.45%	0.28%	0.32%	0.52%	0.26%
COLUMBUS	0.25%	0.13%	0.15%	0.27%	0.22%
CRAVEN	0.60%	0.48%	0.52%	0.64%	0.43%
CUMBERLAND	2.33%	1.84%	2.13%	2.45%	1.62%
CURRITUCK	0.68%	0.54%	0.76%	0.57%	1.04%

Table C: Percent Distribution By County, 2013

2013 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2013 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DARE	4.71%	4.16%	5.93%	4.42%	7.09%
DAVIDSON	0.71%	0.42%	0.47%	0.77%	0.75%
DAVIE	0.17%	0.13%	0.14%	0.18%	0.10%
DUPLIN	0.18%	0.09%	0.10%	0.21%	0.19%
DURHAM	3.25%	2.84%	3.85%	3.40%	3.58%
EDGEcombe	0.26%	0.16%	0.18%	0.29%	0.15%
FORSYTH	3.73%	2.70%	3.16%	4.29%	2.24%
FRANKLIN	0.10%	0.05%	0.06%	0.11%	0.09%
GASTON	1.10%	0.74%	0.89%	1.22%	0.60%
GATES	0.03%	0.01%	0.01%	0.04%	0.04%
GRAHAM	0.12%	0.09%	0.13%	0.11%	0.27%
GRANVILLE	0.22%	0.12%	0.15%	0.25%	0.20%
GREENE	0.03%	0.01%	0.01%	0.03%	0.03%
GUILFORD	5.97%	6.29%	6.28%	6.04%	4.45%
HALIFAX	0.42%	0.21%	0.26%	0.50%	0.33%
HARNETT	0.37%	0.22%	0.28%	0.40%	0.27%
HAYWOOD	0.77%	0.68%	0.81%	0.83%	0.95%
HENDERSON	1.15%	0.88%	1.03%	1.02%	1.64%
HERTFORD	0.13%	0.07%	0.09%	0.15%	0.11%
HOKE	0.05%	0.03%	0.04%	0.06%	0.03%
HYDE	0.16%	0.13%	0.19%	0.15%	0.29%
IREDELL	1.05%	0.69%	0.85%	1.13%	1.07%
JACKSON	0.81%	0.79%	0.81%	0.88%	1.23%
JOHNSTON	1.01%	0.66%	0.84%	1.10%	0.84%
JONES	0.02%	0.01%	0.01%	0.02%	0.02%
LEE	0.34%	0.25%	0.30%	0.38%	0.22%
LENOIR	0.40%	0.28%	0.31%	0.43%	0.25%

Table C: Percent Distribution By County, 2013

2013 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2013 (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%	0.16%	0.18%	0.26%	0.24%
MACON	0.70%	0.51%	0.59%	0.61%	1.84%
MADISON	0.16%	0.13%	0.16%	0.16%	0.25%
MARTIN	0.14%	0.09%	0.11%	0.15%	0.12%
MCDOWELL	0.25%	0.16%	0.20%	0.26%	0.30%
MECKLENBURG	22.80%	32.66%	23.47%	21.20%	18.44%
MITCHELL	0.10%	0.07%	0.08%	0.09%	0.15%
MONTGOMERY	0.13%	0.05%	0.05%	0.11%	0.43%
MOORE	2.03%	1.94%	2.59%	2.03%	2.01%
NASH	1.27%	1.05%	1.43%	1.31%	1.13%
NEW HANOVER	2.36%	2.29%	2.75%	2.25%	3.16%
NORTHAMPTON	0.06%	0.03%	0.03%	0.06%	0.18%
ONSLOW	1.04%	0.82%	0.87%	1.06%	1.28%
ORANGE	0.83%	0.67%	0.86%	0.88%	0.59%
PAMLICO	0.08%	0.04%	0.04%	0.07%	0.29%
PASQUOTANK	0.27%	0.18%	0.23%	0.29%	0.20%
PENDER	0.42%	0.31%	0.38%	0.39%	0.96%
PERQUIMANS	0.05%	0.03%	0.02%	0.04%	0.18%
PERSON	0.16%	0.09%	0.10%	0.19%	0.12%
PITT	1.02%	0.85%	1.00%	1.03%	0.74%
POLK	0.12%	0.07%	0.09%	0.12%	0.21%
RANDOLPH	0.62%	0.40%	0.46%	0.73%	0.33%
RICHMOND	0.22%	0.16%	0.20%	0.23%	0.13%
ROBESON	0.63%	0.40%	0.53%	0.71%	0.41%
ROCKINGHAM	0.31%	0.21%	0.26%	0.32%	0.25%
ROWAN	0.72%	0.50%	0.63%	0.75%	0.77%
RUTHERFORD	0.74%	0.45%	0.58%	0.87%	0.74%

Table C: Percent Distribution By County, 2013

2013 Impact of Travel on North Carolina					
Table C: Percent Distribution by County, 2013 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SAMPSON	0.23%	0.13%	0.14%	0.25%	0.24%
SCOTLAND	0.19%	0.13%	0.18%	0.21%	0.11%
STANLY	0.35%	0.20%	0.23%	0.40%	0.34%
STOKES	0.11%	0.06%	0.06%	0.11%	0.14%
SURRY	0.55%	0.34%	0.40%	0.59%	0.38%
SWAIN	0.93%	1.12%	1.06%	1.13%	0.66%
TRANSYLVANIA	0.42%	0.32%	0.37%	0.32%	0.62%
TYRRELL	0.02%	0.01%	0.01%	0.02%	0.05%
UNION	0.56%	0.37%	0.46%	0.60%	0.33%
VANCE	0.21%	0.12%	0.14%	0.25%	0.20%
WAKE	9.31%	12.42%	10.22%	8.79%	8.24%
WARREN	0.13%	0.07%	0.06%	0.09%	0.36%
WASHINGTON	0.07%	0.04%	0.05%	0.08%	0.10%
WATAUGA	1.07%	1.01%	1.27%	1.05%	1.38%
WAYNE	0.73%	0.41%	0.50%	0.88%	0.36%
WILKES	0.33%	0.21%	0.26%	0.32%	0.26%
WILSON	0.51%	0.32%	0.40%	0.59%	0.32%
YADKIN	0.17%	0.12%	0.17%	0.17%	0.13%
<u>YANCEY</u>	<u>0.16%</u>	<u>0.11%</u>	<u>0.12%</u>	<u>0.14%</u>	<u>0.38%</u>
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change From 2012

2013 Impact of Travel on North Carolina					
Table D: Percent Change From 2012					
County	Expenditures	Payroll	Employment	State Tax Receipts	Local Tax Receipts
ALAMANCE	4.66%	5.47%	2.93%	5.14%	3.91%
ALEXANDER	3.56%	4.36%	1.85%	4.18%	3.35%
ALLEGHANY	0.24%	1.02%	-1.42%	0.75%	2.01%
ANSON	1.15%	1.94%	-0.52%	2.16%	2.07%
ASHE	2.50%	3.30%	0.80%	3.09%	2.83%
AVERY	1.19%	1.97%	-0.49%	1.60%	2.39%
BEAUFORT	-0.13%	0.64%	-1.79%	0.86%	1.64%
BERTIE	0.34%	1.12%	-1.32%	1.70%	1.50%
BLADEN	2.01%	2.14%	0.32%	3.03%	2.41%
BRUNSWICK	5.54%	6.36%	3.80%	5.85%	3.93%
BUNCOMBE	8.04%	8.47%	4.96%	8.15%	6.06%
BURKE	7.62%	8.46%	5.84%	7.35%	5.57%
CABARRUS	2.45%	3.25%	0.76%	2.97%	2.83%
CALDWELL	2.89%	3.69%	1.19%	3.56%	3.00%
CAMDEN	3.29%	4.09%	1.58%	3.93%	3.25%
CARTERET	7.35%	7.63%	4.51%	7.50%	4.61%
CASWELL	3.86%	4.66%	2.14%	4.22%	3.40%
CATAWBA	5.12%	5.94%	3.38%	5.38%	4.15%
CHATHAM	4.39%	5.20%	2.66%	4.77%	3.87%
CHEROKEE	4.79%	5.60%	3.05%	5.08%	3.74%
CHOWAN	3.27%	4.07%	1.56%	3.75%	3.88%
CLAY	1.75%	2.54%	0.07%	2.22%	2.56%
CLEVELAND	-0.53%	0.24%	-2.18%	0.84%	1.19%
COLUMBUS	3.56%	4.36%	1.84%	4.12%	3.39%
CRAVEN	1.20%	1.98%	-0.48%	1.92%	2.02%
CUMBERLAND	0.93%	1.71%	-0.74%	1.57%	2.06%
CURRITUCK	5.00%	5.81%	3.26%	5.32%	3.74%

Table D: Percent Change From 2012

2013 Impact of Travel on North Carolina					
Table D: Percent Change From 2012 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
DARE	2.88%	3.68%	1.18%	3.24%	2.99%
DAVIDSON	4.25%	5.06%	2.53%	4.68%	3.78%
DAVIE	4.40%	5.21%	2.67%	4.79%	3.72%
DUPLIN	3.54%	4.35%	1.83%	4.08%	3.35%
DURHAM	5.81%	6.63%	4.06%	6.06%	11.45%
EDGEcombe	0.02%	0.80%	-1.63%	1.19%	4.76%
FORSYTH	5.89%	6.12%	3.65%	5.89%	4.82%
FRANKLIN	-0.90%	-0.13%	-2.54%	0.27%	1.27%
GASTON	3.02%	3.82%	1.31%	3.64%	3.07%
GATES	2.07%	2.87%	0.38%	3.09%	2.48%
GRAHAM	0.01%	0.78%	-1.65%	0.57%	1.92%
GRANVILLE	3.40%	4.20%	1.69%	4.05%	3.35%
GREENE	0.99%	1.77%	-0.68%	2.02%	5.25%
GUILFORD	4.10%	4.91%	2.38%	4.42%	3.42%
HALIFAX	2.92%	3.72%	1.22%	3.69%	3.05%
HARNETT	3.86%	4.66%	2.14%	4.29%	3.44%
HAYWOOD	4.54%	5.36%	2.81%	4.57%	3.64%
HENDERSON	6.78%	7.22%	4.42%	6.85%	4.58%
HERTFORD	2.56%	3.21%	1.83%	3.40%	2.82%
HOKE	2.02%	2.81%	0.33%	2.74%	2.60%
HYDE	1.16%	1.95%	-0.51%	1.58%	2.38%
IREDELL	3.34%	4.15%	1.63%	3.87%	3.21%
JACKSON	4.47%	5.28%	2.75%	4.50%	3.59%
JOHNSTON	3.47%	4.27%	1.75%	3.99%	3.28%
JONES	0.67%	1.45%	-0.99%	2.03%	1.58%
LEE	4.54%	5.35%	2.81%	4.90%	3.81%
LENOIR	0.53%	1.31%	-1.13%	1.42%	1.83%

Table D: Percent Change From 2012

2013 Impact of Travel on North Carolina					
Table D: Percent Change From 2012 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
LINCOLN	1.00%	1.21%	-0.96%	1.94%	2.05%
MACON	3.75%	4.56%	2.04%	4.10%	3.31%
MADISON	1.92%	2.71%	0.23%	2.50%	2.61%
MARTIN	3.48%	4.28%	1.77%	3.99%	3.28%
MCDOWELL	3.46%	4.26%	1.75%	3.98%	3.27%
MECKLENBURG	4.66%	5.47%	2.93%	4.70%	3.34%
MITCHELL	0.48%	1.26%	-1.18%	1.21%	2.02%
MONTGOMERY	2.69%	3.48%	0.99%	3.19%	3.92%
MOORE	4.54%	5.35%	2.81%	4.89%	3.58%
NASH	0.36%	1.14%	-1.30%	0.97%	1.95%
NEW HANOVER	3.83%	4.64%	2.11%	3.94%	3.18%
NORTHAMPTON	-0.95%	-0.18%	-2.59%	-0.18%	0.89%
ONslow	3.49%	4.29%	1.77%	3.71%	3.07%
ORANGE	4.32%	5.13%	2.60%	4.71%	7.74%
PAMLICO	3.85%	4.66%	2.13%	4.22%	3.39%
PASQUOTANK	0.59%	1.37%	-1.07%	1.41%	2.02%
PENDER	4.45%	5.26%	2.72%	4.77%	3.57%
PERQUIMANS	3.29%	4.09%	1.58%	3.65%	3.15%
PERSON	0.02%	0.79%	-1.64%	1.40%	1.37%
PITT	3.00%	3.80%	1.30%	3.47%	3.00%
POLK	2.99%	3.79%	1.28%	3.61%	3.05%
RANDOLPH	3.53%	4.34%	1.82%	4.12%	3.38%
RICHMOND	4.51%	5.32%	2.78%	4.86%	3.69%
ROBESON	1.43%	2.21%	-0.25%	2.36%	2.26%
ROCKINGHAM	-0.79%	-0.02%	-1.38%	0.17%	1.43%
ROWAN	5.48%	6.29%	3.73%	5.70%	4.14%
RUTHERFORD	0.55%	1.33%	-1.12%	1.79%	1.70%

Table D: Percent Change From 2012

2013 Impact of Travel on North Carolina					
Table D: Percent Change From 2012 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SAMPSON	2.21%	2.58%	0.52%	2.97%	2.66%
SCOTLAND	1.07%	1.86%	-0.60%	1.89%	2.19%
STANLY	2.07%	2.86%	0.38%	2.98%	2.55%
STOKES	0.24%	1.02%	-1.42%	1.27%	1.77%
SURRY	3.36%	4.16%	1.65%	3.88%	3.22%
SWAIN	2.12%	2.91%	0.43%	2.14%	2.72%
TRANSYLVANIA	4.13%	4.93%	2.40%	4.46%	3.43%
TYRRELL	2.30%	3.09%	0.60%	2.96%	2.73%
UNION	3.82%	4.62%	2.10%	4.26%	3.42%
VANCE	0.20%	0.97%	-1.46%	1.62%	1.34%
WAKE	5.10%	5.23%	3.07%	5.16%	3.80%
WARREN	1.41%	2.20%	-0.27%	2.02%	2.40%
WASHINGTON	1.78%	2.57%	0.10%	2.66%	2.44%
WATAUGA	2.71%	3.51%	1.01%	3.12%	2.92%
WAYNE	2.14%	2.93%	0.45%	3.09%	2.55%
WILKES	6.18%	7.00%	4.42%	6.30%	4.45%
WILSON	1.52%	1.76%	-0.16%	2.43%	2.28%
YADKIN	3.10%	3.90%	1.40%	3.64%	3.10%
<u>YANCEY</u>	<u>3.45%</u>	<u>4.25%</u>	<u>1.73%</u>	<u>3.82%</u>	<u>3.20%</u>
STATE TOTALS	4.17%	5.01%	2.41%	4.42%	3.77%

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Table E: Alphabetical By County, 2012

2012 Impact of Travel on North Carolina					
Table E: Alphabetical by County, 2012					
<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	\$156.50	\$24.07	1.28	\$8.90	\$2.68
ALEXANDER	17.50	2.49	0.11	0.94	0.70
ALLEGHANY	21.94	3.80	0.18	1.02	1.42
ANSON	16.00	1.88	0.10	0.91	0.38
ASHE	46.55	6.61	0.37	2.34	2.45
AVERY	103.74	22.87	1.19	5.08	4.46
BEAUFORT	71.08	8.91	0.43	3.50	4.08
BERTIE	12.68	1.21	0.05	0.68	0.68
BLADEN	35.71	3.65	0.19	2.08	0.98
BRUNSWICK	445.87	80.59	4.84	20.20	27.17
BUNCOMBE	834.25	175.37	9.32	41.55	27.41
BURKE	80.46	11.25	0.62	4.35	2.26
CABARRUS	362.97	77.56	3.95	20.25	6.33
CALDWELL	46.55	6.75	0.33	2.47	1.40
CAMDEN	1.86	0.20	0.01	0.10	0.15
CARTERET	282.03	49.18	2.93	12.45	16.98
CASWELL	7.67	0.76	0.04	0.35	0.53
CATAWBA	220.74	38.53	2.08	11.85	6.45
CHATHAM	29.47	3.41	0.17	1.69	0.53
CHEROKEE	35.33	5.19	0.29	1.64	2.07
CHOWAN	18.13	2.59	0.14	0.86	1.11
CLAY	12.29	1.30	0.06	0.50	1.32
CLEVELAND	92.44	12.86	0.65	5.27	1.57
COLUMBUS	47.89	5.53	0.28	2.67	1.27
CRAVEN	119.32	21.86	1.04	6.36	2.54
CUMBERLAND	467.64	83.51	4.25	24.42	9.53
CURRITUCK	131.15	23.70	1.46	5.50	6.06

Table E: Alphabetical By County, 2012

2012 Impact of Travel on North Carolina					
Table E: Alphabetical by County, 2012 (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	926.33	184.92	11.62	43.35	41.40
DAVIDSON	136.94	18.53	0.92	7.46	4.33
DAVIE	32.18	5.58	0.27	1.74	0.55
DUPLIN	35.70	3.94	0.19	2.01	1.13
DURHAM	621.11	123.02	7.34	32.48	19.29
EDGECOMBE	53.56	7.09	0.36	2.88	0.88
FORSYTH	711.83	117.36	6.04	41.05	12.82
FRANKLIN	21.24	2.38	0.12	1.14	0.51
GASTON	215.16	32.85	1.74	11.97	3.48
GATES	5.90	0.49	0.02	0.35	0.21
GRAHAM	24.84	4.12	0.25	1.14	1.59
GRANVILLE	42.97	5.13	0.28	2.42	1.16
GREENE	5.40	0.51	0.03	0.29	0.18
GUILFORD	1,159.16	276.39	12.16	58.61	25.89
HALIFAX	81.89	9.45	0.50	4.89	1.93
HARNETT	71.78	9.86	0.55	3.84	1.59
HAYWOOD	148.63	29.88	1.57	8.06	5.49
HENDERSON	218.44	37.80	1.96	9.70	9.42
HERTFORD	25.54	3.12	0.17	1.48	0.62
HOKE	10.55	1.25	0.07	0.57	0.16
HYDE	31.99	5.94	0.38	1.47	1.67
IREDELL	205.73	30.76	1.66	11.05	6.23
JACKSON	156.05	34.71	1.57	8.55	7.11
JOHNSTON	197.66	29.11	1.63	10.76	4.88
JONES	3.88	0.51	0.02	0.23	0.12
LEE	65.03	11.01	0.59	3.64	1.27
LENOIR	79.51	12.76	0.62	4.30	1.47

Table E: Alphabetical By County, 2012

2012 Impact of Travel on North Carolina						
Table E: Alphabetical by County, 2012 (Continued)						
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)	
LINCOLN	47.80	7.45	0.36	2.57	1.38	
MACON	135.76	22.63	1.15	5.96	10.72	
MADISON	32.22	6.03	0.31	1.62	1.45	
MARTIN	27.99	4.02	0.22	1.49	0.67	
MCDOWELL	49.06	7.07	0.39	2.51	1.73	
MECKLENBURG	4,404.90	1,428.11	45.20	205.14	107.29	
MITCHELL	20.96	3.07	0.16	0.90	0.88	
MONTGOMERY	24.91	2.43	0.11	1.12	2.47	
MOORE	392.16	84.89	5.00	19.62	11.69	
NASH	256.80	48.07	2.87	13.12	6.68	
NEW HANOVER	460.05	100.74	5.34	21.96	18.44	
NORTHAMPTON	13.21	1.47	0.05	0.57	1.07	
ONSLOW	203.40	36.22	1.70	10.32	7.47	
ORANGE	161.60	29.48	1.66	8.54	3.31	
PAMLICO	15.64	1.79	0.08	0.63	1.69	
PASQUOTANK	54.71	8.02	0.47	2.93	1.19	
PENDER	80.59	13.42	0.74	3.78	5.60	
PERQUIMANS	9.52	1.11	0.04	0.39	1.05	
PERSON	32.81	3.91	0.21	1.86	0.70	
PITT	199.68	37.89	1.95	10.11	4.32	
POLK	22.63	3.13	0.17	1.15	1.24	
RANDOLPH	120.28	17.70	0.90	7.07	1.90	
RICHMOND	42.29	7.22	0.39	2.18	0.78	
ROBESON	125.78	18.09	1.05	7.07	2.42	
ROCKINGHAM	62.30	9.85	0.52	3.20	1.46	
ROWAN	137.74	21.70	1.21	7.15	4.44	
RUTHERFORD	149.69	20.46	1.15	8.65	4.36	

Table E: Alphabetical By County, 2012

2012 Impact of Travel on North Carolina					
Table E: Alphabetical by County, 2012 (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	45.12	5.62	0.28	2.45	1.39
SCOTLAND	38.79	6.10	0.35	2.08	0.66
STANLY	69.24	8.78	0.46	3.91	2.00
STOKES	22.10	2.72	0.13	1.10	0.84
SURRY	107.07	14.91	0.77	5.77	2.23
SWAIN	184.09	50.29	2.10	11.25	3.84
TRANSYLVANIA	80.93	14.13	0.72	3.06	3.63
TYRRELL	3.38	0.31	0.01	0.15	0.31
UNION	108.62	16.35	0.89	5.87	1.94
VANCE	42.75	5.56	0.28	2.46	1.20
WAKE	1,791.64	544.39	19.67	84.73	47.72
WARREN	25.29	2.96	0.13	0.90	2.14
WASHINGTON	14.11	1.78	0.09	0.76	0.58
WATAUGA	211.00	44.87	2.50	10.32	8.08
WAYNE	144.37	18.52	0.98	8.66	2.13
WILKES	63.55	8.99	0.49	3.05	1.51
WILSON	102.48	14.57	0.80	5.84	1.89
YADKIN	32.38	5.36	0.32	1.70	0.77
<u>YANCEY</u>	<u>31.69</u>	<u>4.96</u>	<u>0.23</u>	<u>1.39</u>	<u>2.20</u>
STATE TOTALS	\$19,409.81	\$4,391.25	193.61	\$970.41	\$579.38

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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 Massachusetts.

Estimates for Counties and Local Areas

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

Data from the U.S. Bureau of the Census, Smith Travel Research, Enos Foundation, Runzheimer International, Cruise Lines International Association, Prentice-Hall, U.S. Department of Labor's Consumer Expenditure Survey and ES-202, American Society of Travel Agents, the Federal Aviation Administration, the Department of Transportation, Amtrak, the Federal Highway Administration, state revenue departments, U.S. Travel Association's travel surveys and other sources are used in building and updating the model. These data indicate the change in travel

spending for each of the expenditure categories for each state over the previous year, as well as changes in the relationship of travel spending to employment, payroll and tax revenue.

Limitations of the Study

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

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

Appendix B: Glossary of Terms – TEIM

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

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

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

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

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

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

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

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

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

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

Appendix C: Travel-Related Industry Measurement

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 Commerce - Division of Tourism, Film & Sports Development
North Carolina Department of Transportation
North Carolina Department of Revenue
North Carolina Employment Security Commission
Smith Travel Research
The Office of Travel and Tourism Industries (OTTI)/ITA, U.S. Department of Commerce
U.S. Travel Association