

**The Economic Impact
of Travel on
Tennessee Counties
2004**

A Study Prepared for the
Tennessee Department of Tourist Development
by the
Research Department of the
Travel Industry Association of America
Washington, D.C.
August 2005

PREFACE

This study was conducted by the Research Department of the Travel Industry Association of America (TIA) for the *Tennessee Department of Tourist Development*. The study provides 2003 and preliminary 2004 estimates of domestic and international travel-related expenditures in Tennessee, as well as the employment, payroll income, and federal, state and local tax revenue directly generated by these expenditures. Multiplier impact of these expenditures is also included.

Additionally, this study provides preliminary 2004 and revised 2003 domestic estimates by county for travel related expenditures, employment, payroll income and state and local tax revenue directly generated by these expenditures.

Travel Industry Association of America
Washington, D.C.
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TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
INTRODUCTION	2
2004 TRAVEL IMPACT ON THE U.S. ECONOMY	3
TRAVEL IMPACT ON TENNESSEE – 2004	10
TRAVEL EXPENDITURES	10
TRAVEL EXPENDITURE TRENDS	12
TENNESSEE RANKING – DOMESTIC TRAVEL EXPENDITURES	14
TRAVEL-GENERATED PAYROLL	16
TRAVEL-GENERATED EMPLOYMENT	18
TRAVEL-GENERATED TAX REVENUE	20
MULTIPLIER IMPACT OF TRAVEL SPENDING IN TENNESSEE	22
2004 DOMESTIC TRAVEL IMPACT ON TENNESSEE COUNTIES	24
COUNTY TABLES	26
APPENDICES.....	66
APPENDIX A: REVISED TRAVELSCOPE® DATA	67
APPENDIX B: TRAVEL ECONOMIC IMPACT MODEL.....	68
APPENDIX C: GLOSSARY OF TERMS.....	72
APPENDIX D: TRAVEL-RELATED INDUSTRY MEASUREMENT	73
APPENDIX E: SOURCES OF DATA	76
APPENDIX F: RIMS II.....	77
APPENDIX G: TOP 6 NONAGRICULTURAL INDUSTRIES BY PAYROLL AND EMPLOYMENT IN TENNESSEE IN 2004	82

LIST OF TABLES

<i>Table 1: 2003-04 U.S. Domestic Travel Expenditures by Primary Purpose of Trip</i>	4
<i>Table 2: Travel Expenditures in the U.S. 2003-2004</i>	5
<i>Table 3: Travel-Generated Employment in the U.S. 2003-2004</i>	6
<i>Table 4: Overall U.S. Economic Developments, 2002-2004</i>	7
<i>Table 5: Travel Trends, 2000-2004</i>	8
<i>Table 6: Direct Travel Expenditures in Tennessee by Industry Sector, 2003-2004</i>	11
<i>Table 7: Travel Expenditure Trends in Tennessee, 1999-2004</i>	13
<i>Table 8: Share of Domestic Travel Expenditures in the South Region by State, 2003</i>	14
<i>Table 9: Ranking of the Top 20 U.S. States in 2003 by Domestic Travel Expenditures</i>	15
<i>Table 10: Travel-Generated Payroll in Tennessee by Industry Sector, 2003-2004</i>	17
<i>Table 11 Travel-Generated Employment in Tennessee by Industry Sector, 2003-2004</i>	19
<i>Table 12: Travel-Generated Tax Revenue in Tennessee by Level of Government, 2003-2004</i>	21
<i>Table 13: Multiplier Impact of Travel Spending in Tennessee, 2003-2004</i>	23
<i>Table 14: Domestic Travel Impact in Tennessee - Top 5 Counties, 2003-2004</i>	25
<i>Table A: Alphabetical by County</i>	27
<i>Table B: Ranking of Counties by Expenditure Levels</i>	31
<i>Table C: Percent Distribution by County</i>	35
<i>Table D: Percent Change Over 2003</i>	39
<i>Table E: Alphabetical by County, 2003</i>	43
<i>Table F: Alphabetical by Region, 2004</i>	47
<i>Table G: Change in Travel Spending from 2003 by Region</i>	51
<i>Table H: Percent Change Over 2003 by Region</i>	55
<i>Table I: Alphabetical by Region, 2003</i>	59
<i>Table J: Region Total, 2004</i>	63
<i>Table K: Region Total, 2003</i>	64
<i>Table L: Percent Change Over 2003 by Region Total</i>	65

EXECUTIVE SUMMARY

Total Impact of Travel

- Total domestic and international travel-related spending in Tennessee, including direct and indirect spending, reached nearly \$17.7 billion in 2004, up 4.5 percent from 2003.
- Total employment in travel-related industries in Tennessee, both direct and indirect, reached 371.6 thousand jobs in 2004, down 1.1 percent from 2003.
- Total payroll income from travel-related employment was \$7.7 billion in 2004, up 1.2 percent from 2003.

Direct Impact of Domestic and International Travel

- Direct domestic and international travel spending reached nearly \$11.5 billion in Tennessee during 2004, a 5.8 percent increase from 2003.
- Payroll generated by domestic and international travel spending reached more than \$4.7 billion during 2004, up 1.4 percent from 2003.
- Employment generated by domestic and international travel spending accounted for 175.7 thousand jobs within Tennessee in 2004, 6.5 percent of the state's total non-agricultural employment.
- Tax revenues generated by domestic and international travel spending for federal, state, and local governments in 2004 totaled nearly \$2.6 billion, a 2.8 percent increase from 2003.

Direct Impact of Domestic Travel

- In 2004, direct domestic travel spending in Tennessee was up 5.5 percent compared with 2003, to nearly \$11.2 billion.
- Payroll generated by domestic travel spending reached nearly \$4.7 billion, a 1.3 percent increase from 2003.
- Employment generated by domestic travel spending declined 1.0 percent from 2003, to 171.5 thousand jobs.
- Tax revenue generated by domestic travel spending for federal, state, and local governments totaled more than \$2.5 billion, up 2.6 percent from 2003.

INTRODUCTION

This report presents 2003 and preliminary 2004 estimates of the impact of U.S. resident and international traveler spending in Tennessee, as well as the employment, payroll income and tax revenue directly generated by this spending. These estimates are produced through the County/City Travel Economic Impact Model, a computerized economic model producing estimates of travel spending at the county level, and its impact on employment, wage and salary (payroll) income, and state and local tax revenues.

The TEIM, initially developed in 1975 for the U.S. Department of the Interior, measures the economic value of travel and tourism to states and counties. The original model has since been extensively revised using more accurate and targeted input data available from governments and the private sector. The TEIM is based upon national travel surveys conducted by TIA and other data developed by the Bureau of the Census, TIA, various federal agencies and national travel organizations each year. A description of the TEIM is provided in *Appendix B*. Estimates of travel economic impact in Tennessee are based on the most recent version of the TEIM. The most current TravelScope[®] data and data provided by Tennessee Department of Tourism Development and other sources are employed in the model.

U.S. domestic impact data includes both state residents and out-of-state visitors to Tennessee traveling away from home overnight in paid accommodations, or on day trips to places 50 miles or more, one way, away from home during 2004. 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 2004 will become available subsequent to this study, TIA reserves the right to revise these estimates in the future.

2004 TRAVEL IMPACT ON THE U.S. ECONOMY

The U.S. economy turned in its best performance in five years in 2004, with real GDP increasing 4.2 percent. Real disposable income and real personal consumption expenditures both rose significantly, 3.4 percent and 3.9 percent, respectively. The U.S. job market also improved during 2004 as annual average total nonfarm employment increased nearly 1.5 million from 2003 to 131.5 million. This reduced the national unemployment rate to 5.5 percent, one-half point lower than in 2003. The travel industry itself added 72 thousands jobs in 2004 as compared to 2003. The Consumer Price Index (CPI), an indicator of the level of price inflation, remained relatively moderate—up 2.7 percent in 2004, while TIA’s Travel Price Index increased 4.5 percent during the same period, primarily due to a significant increase in the price of gasoline. The total U.S. current account deficit rose to a record high of \$666 billion in 2004. The U.S. travel industry, however, generated a \$5.8 billion trade surplus for the country in 2004.

Stimulated by the strong economy, domestic travel volume (total person-trips) increased 2.1 percent in 2004 and domestic travel expenditures rose even more at 6.8 percent. After three consecutive years of declines, international travel to the U.S. began to recover, reflecting appreciating currencies in many of the United States’ key origin markets. International traveler spending jumped nearly 16 percent from 2003, largely due to a sharp increase of international arrivals.

U.S. Travel Volume in 2004

In 2004, total U.S. domestic person-trips were up 2.1 percent over 2003, according to TIA’s TravelScope® survey. Leisure person-trips grew at slower pace than in the past few years, rising 1.4 percent. Business/convention travel, however, began its long-awaited recovery, increasing 5.0 percent, the first increase posted since 1998. International visitors to the U.S. increased 11.8 percent in 2004 to 46.1 million. International travel to the U.S., however, remained 10.1 percent lower than its historical record set in 2000.

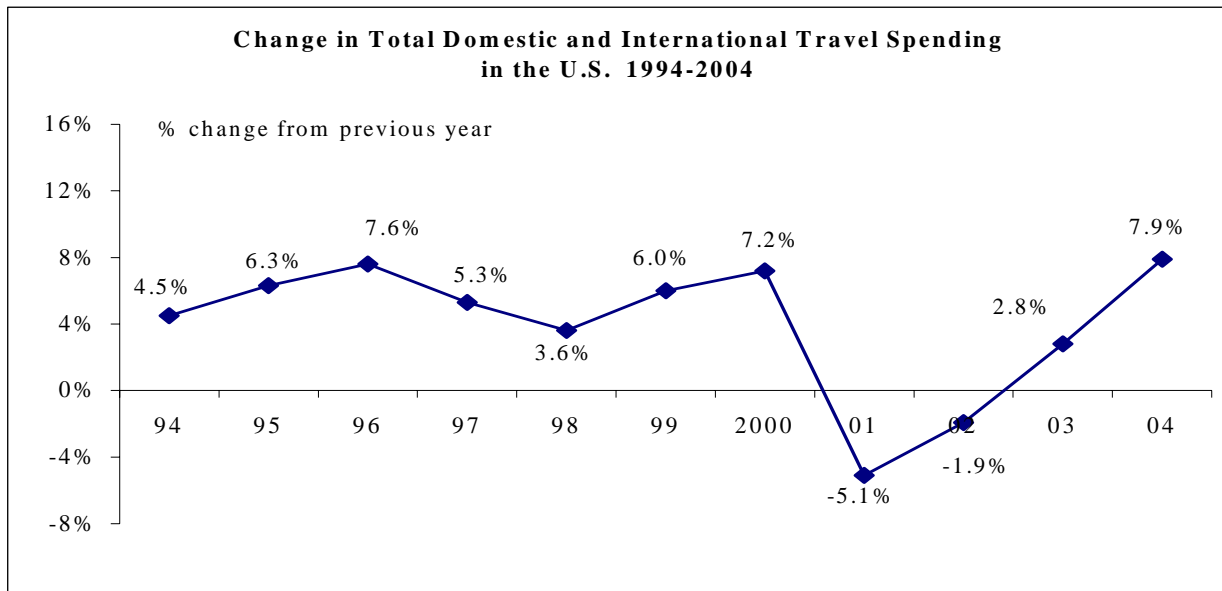
Travel Expenditures in 2004

Domestic travelers spent more than \$524.4 billion in the U.S. during 2004, an increase of 6.8 percent over 2003. International traveler expenditures in the U.S., excluding spending on international airfares purchased outside the U.S., increased more than twice as much, up 15.9 percent to total \$74.8 billion in 2004.

Combined domestic and international travel expenditures in the U.S. totaled \$599.2 billion, 7.9 percent more than in 2003. In fact, 2004 travel expenditures were 8.8 percent higher than in 2001, the most challenging year ever in U.S. travel industry history. And, for the first time since 9/11, total U.S. travel expenditures exceeded the historical record of \$580.8 billion set in 2000.

Total domestic leisure travel spending reached \$355.4 billion, up 5.3 percent over 2003. Spending by domestic business/convention travelers increased dramatically, up 10.1 percent to

\$169 billion. Domestic business travelers' spending accounted for about one-third of total domestic travel spending in 2004.



Sources: TIA, OTTI

	2004 Travel Spending In the U.S. (\$ Billions)	2003 Travel Spending in the U.S. (\$ Billions)	2004 Percent Change Over 2003 (%)
Leisure Travelers	\$355.4	\$337.4	5.3%
Business Travelers	\$169.0	\$153.5	10.1%
Total	\$524.4	\$490.9	6.8%

Source: TIA, OTTI

Domestic travel spending on auto transportation jumped 12.4 percent over 2003, to \$92.6 billion, reflecting the dramatic increase in gasoline prices during 2004. Total domestic air passenger enplanements were up 4.8 percent from 2003 and international air passenger enplanements jumped 13.9 percent in 2004, according to the Air Transport Association (ATA). In 2004,

Amtrak reported a 2.6 percent increase in ridership. This growth in demand contributed to the 4.9 percent increase in public transportation expenditures in 2004.

Domestic travel spending on lodging increased 7.0 percent over 2003. Hotel room demand (hotel room-nights sold) grew 5.4 percent, according to Smith Travel Research.

Table 2: Travel Expenditures in the U.S. 2003-2004

<u>Industry Sector*</u>	<u>2004 Travel Spending In The U.S. (\$ Billions)</u>	<u>2003 Travel Spending in The U.S. (\$ Billions)</u>	<u>2004 Percent Change Over 2003 (%)</u>
Public Transportation	\$100.8	\$96.1	4.9%
Auto Transportation	92.6	82.4	12.4%
Lodging	93.9	87.8	7.0%
Foodservice	130.6	123.6	5.6%
Entertainment/Recreation	63.5	59.9	6.0%
General Retail	43.0	41.0	4.8%
Domestic Travelers	\$524.4	\$490.9	6.8%
International Travelers**	\$74.8	\$64.5	15.9%
Total	\$599.2	\$555.4	7.9%

Source: TIA

* Total international traveler spending does not include international passenger fare payments, international traveler spending in the U.S. territories, and Canadian traveler spending not allocated to states.

Travel Employment in 2004

Nearly 1.5 million jobs were added to the non-farm sector of the strengthening U.S. economy in 2004, a 1.1 percent up from 2003, according to the U.S. Bureau of Labor Statistics (BLS). This reduced the national unemployment rate fell to 5.5 percent from 6.0 percent in 2003. Employment generated by domestic and international traveler spending in the U.S. increased 1.0 percent during 2004.

Examining just employment related to domestic travel expenditures, the greatest gain occurred in the entertainment/recreation sector, with employment up 1.1 percent. Employment related to auto transportation and lodging increased 0.8 percent each in 2004. Employment generated by domestic travel in the travel planning sector (i.e., the travel agent and travel arrangement industry), however, declined 4.1 percent in 2004, the most severe decline among all travel industry sectors. Employment in the public transportation sector (composed primarily of the airline industry) continued to decline as well, down 2.3 percent from 2003.

Table 3: Travel-Generated Employment in the U.S. 2003-2004

<u>Industry Sector*</u>	<u>2004 Travel-Generated Employment (Thousands)</u>	<u>2003 Travel-Generated Employment (Thousands)</u>	<u>2004 Percent Change Over 2003 (%)</u>
Public Transportation	946.8	969.4	-2.3%
Auto Transportation	257.4	255.4	0.8%
Lodging	1,211.4	1,202.2	0.8%
Foodservice	2,446.4	2,434.4	0.5%
Entertainment/Recreation	1,081.9	1,069.8	1.1%
General Retail	332.7	335.9	-1.0%
Travel Planning	170.8	178.1	-4.1%
Domestic Travelers	6,447.4	6,445.3	0.0%
International Travelers	884.3	814.8	8.5%
Total	7,331.7	7,260.1	1.0%

Sources: TIA, BLS

Table 4: Overall U.S. Economic Developments, 2002-2004

<u>Sector</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>
Nominal gross domestic product (\$ billions)	\$10,469.6	\$10,971.2	\$11,734.3
Real gross domestic product (\$ billions)*	\$10,048.8	\$10,320.6	\$10,755.7
Total retail sales (\$ billions)	\$3,141.5	\$3,275.4	\$3,521.7
Real disposable personal income (\$ billions)*	\$7,562.2	\$7,741.8	\$8,004.3
Real personal consumption expenditures (\$ billions)*	\$7,099.3	\$7,306.6	\$7,588.6
Consumer price index**	179.9	184.0	188.9
Travel Price Index**	196.3	201.1	210.2
Non-farm payroll employment (millions)	130.3	130.0	131.5
Unemployment rate (%)	5.8	6.0	5.5

Percentage change from previous year

Nominal gross domestic product	3.4%	4.8%	7.0%
Real gross domestic product	1.6%	2.7%	4.2%
Total retail sales	2.3%	4.3%	7.5%
Real disposable personal income	3.1%	2.4%	3.7%
Real personal consumption expenditures	2.7%	2.9%	3.9%
Consumer price index	1.6%	2.3%	2.7%
Travel Price Index	-0.3%	2.4%	4.5%
Non-farm payroll employment	-1.1%	-0.3%	1.1%

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

* Chained 2000 dollars

** Base period: 1982-84=100

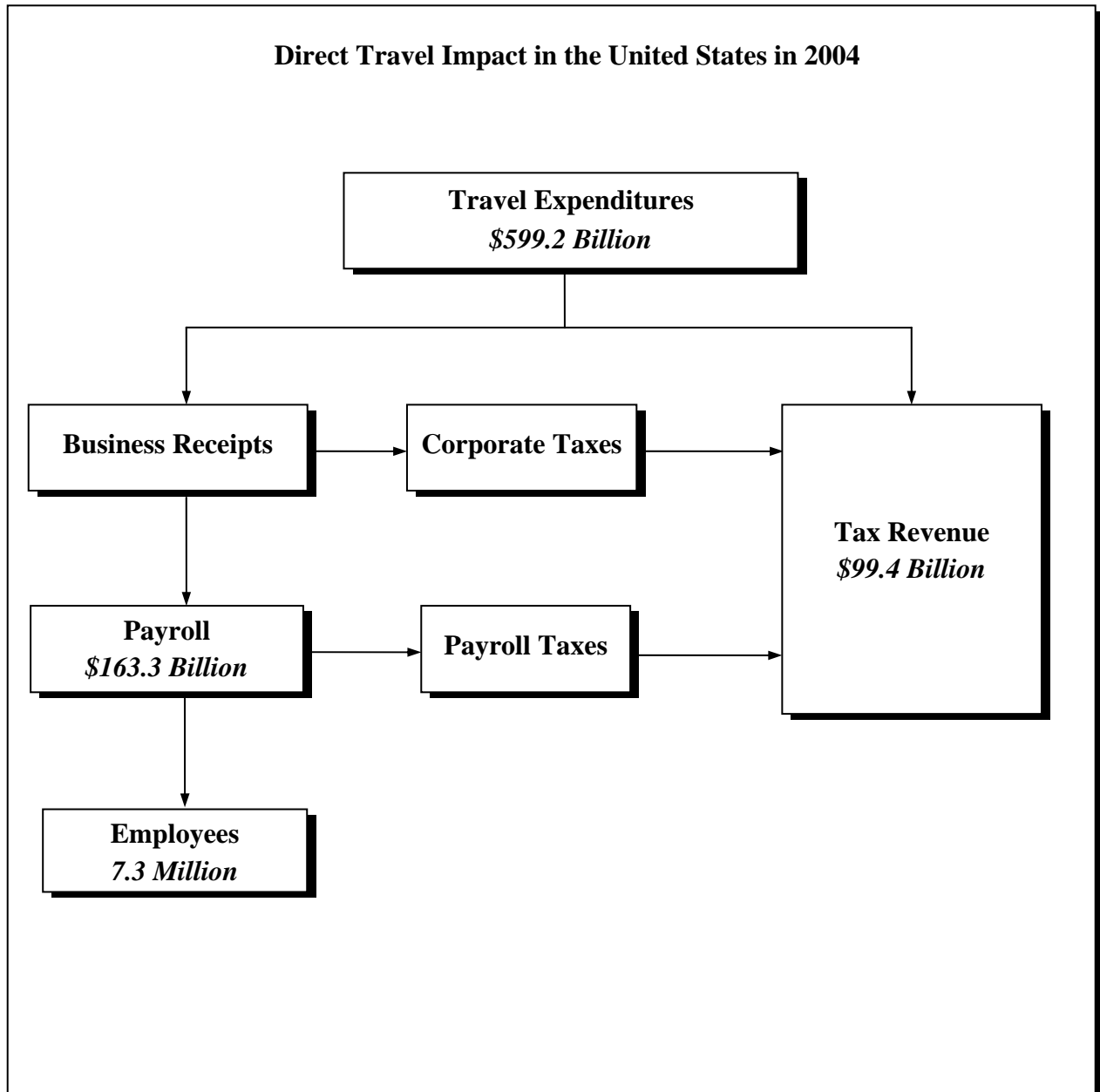
Table 5: Travel Trends, 2000-2004

<u>Category</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>
Total U.S. resident person-trips (millions)	1,100.8	1,123.1	1,127.0	1,140.0	1,163.9
Total international visitors (millions)	51.2	46.9	43.6	41.2	46.1
U.S. travel expenditures (\$ billions)	\$498.4	\$479.0	\$473.6	\$490.9	\$524.4
International travel expenditures in the U.S. * (\$ billions)	\$82.4	\$71.9	\$66.7	\$64.5	\$74.8
Travel price index	194.8	196.9	196.3	201.1	210.2
Travel-generated employment** (thousands)	7,701	7,596	7,366	7,260	7,332
<i>Percentage change from previous year</i>					
Total U.S. resident person-trips	1.0%	2.0%	0.4%	1.2%	2.1%
Total international visitors	5.6%	-8.4%	-7.1%	-5.4%	11.8%
U.S. travel expenditures	6.7%	-3.9%	-1.1%	3.7%	6.8%
International travel expenditures in the U.S. *	10.2%	-12.8%	-7.2%	-3.3%	15.9%
Travel price index	6.1%	1.1%	-0.3%	2.4%	4.5%
Travel-generated employment**	2.9%	-1.4%	-3.0%	-1.4%	1.0%

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

Note: * Includes international traveler spending within the U.S. only. ** The most current estimates by OTTI

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



Source: TIA

Note: International visitor spending excludes international transportation payments on U.S. air carriers made outside of the U.S.

TRAVEL IMPACT ON TENNESSEE – 2004

Travel Expenditures

Travel spending in Tennessee by both domestic and international travelers reached nearly \$11.5 billion during 2004, up 5.8 percent from 2003. Domestic travel spending comprised 97.3 percent of total state travel expenditures in 2004.

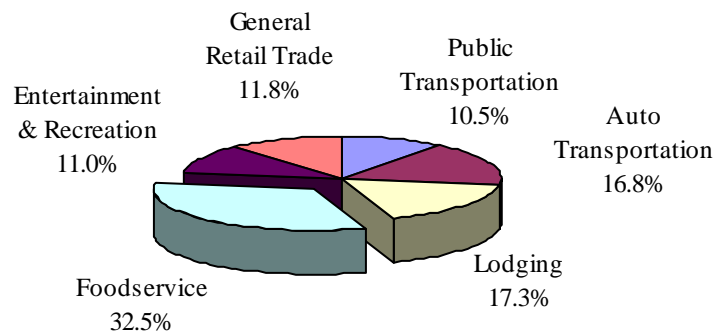
Foodservice was the largest domestic travel expenditure category in 2004, totaling more than \$3.6 billion, almost one-third (32.5%) of the state total. This sector rose 4.0 percent from 2003.

Traveler spending on lodging ranked second with more than \$1.9 billion in 2004, 17.3 percent of the state total.

Domestic travelers spent nearly \$1.9 billion on auto transportation, an increase of 12.6 percent from 2003, largely due to increases of gas prices.

International travelers' spending in Tennessee jumped 15.5 percent from 2003 due to a significant increase in international travelers to Tennessee during 2004.

Direct Domestic Travel Expenditures in Tennessee by Industry Sector, 2004



-
1. Foodservice sector includes restaurants, grocery stores and other eating and drinking establishments.
 2. Lodging sector consists of hotels and motels, campgrounds, and ownership or rental of vacation or second homes.
 3. Public transportation sector comprises air, intercity bus, rail, boat or ship, and taxicab or limousine service.
 4. Auto transportation sector includes privately-owned vehicles that are used for trips (e.g., automobiles, trucks, campers or other recreational vehicles), gasoline stations, and automotive rental.
 5. General retail trade sector includes gifts, clothes, souvenirs, and other incidental retail purchases.
 6. Entertainment and recreation sector includes such items as golf, skiing and gaming.
-

Table 6: Direct Travel Expenditures in Tennessee by Industry Sector, 2003-2004

2004 Expenditures

	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Public Transportation	\$1,174.7	10.5%
Auto Transportation	1,875.7	16.8%
Lodging	1,933.6	17.3%
Foodservice	3,631.1	32.5%
Entertainment & Recreation	1,232.0	11.0%
General Retail Trade	1,316.4	11.8%
<hr/>		
Domestic Total	\$11,163.5	100.0%
International Total	311.9	
Grand Total *	\$11,475.4	

2003 Expenditures

Public Transportation	\$1,103.5	10.4%
Auto Transportation	1,666.2	15.7%
Lodging	1,873.2	17.7%
Foodservice	3,490.1	33.0%
Entertainment & Recreation	1,175.1	11.1%
General Retail Trade	1,271.7	12.0%
<hr/>		
Domestic Total	\$10,579.8	100.0%
International Total	270.0	
Grand Total *	\$10,849.8	

**Percentage Change
2004 over 2003**

Public Transportation	6.5%
Auto Transportation	12.6%
Lodging	3.2%
Foodservice	4.0%
Entertainment & Recreation	4.8%
General Retail Trade	3.5%
<hr/>	
Domestic Total	5.5%
International Total	15.5%
Grand Total *	5.8%

Sources: TIA, OTTI/ITA

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

TRAVEL IMPACT ON TENNESSEE – 2004

Travel Expenditure Trends

During 2004, spending by domestic and international travelers in Tennessee was nearly \$11.5 billion, 2.1 percent of total travel expenditures in the U.S.

The 9/11 terrorist attacks severely hampered the U.S. travel and tourism industry. Domestic traveler spending in the U.S. declined 3.9 percent in 2001. The growth of domestic travel spending in Tennessee was also halted in 2001, but it was much less affected than most other states in the U.S. Domestic travel spending in Tennessee experienced continued recovery in 2002, 2003 and 2004, up, respectively, 1.7 percent, 2.7 percent and 5.5 percent.

On the other hand, after a sharp increase during 2000, international traveler spending in Tennessee declined consecutively for three years from 2001 to 2003, at a rate of more than ten percent. In 2004, international traveler spending in Tennessee jumped 15.5 percent over 2003.

Travel Expenditures Trends

Table 7: Travel Expenditure Trends in Tennessee, 1999-2004

Year	Domestic Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Millions)	U.S. (\$ Millions)		Tennessee (%)	U.S. (%)
2004	11,164	524,403	2.13%	5.5%	6.8%
2003	10,580	490,869	2.16%	2.7%	3.6%
2002	10,298	473,601	2.17%	1.7%	-1.1%
2001	10,126	479,016	2.11%	0.0%	-3.9%
2000	10,124	498,395	2.03%	5.5%	6.7%
1999	9,652	467,149	2.07%	5.0%	6.2%

Year	International Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Millions)	U.S. (\$ Millions)		Tennessee (%)	U.S. (%)
2004	312	74,768	0.42%	15.5%	15.9%
2003	270	64,509	0.42%	-13.2%	-3.3%
2002	311	66,728	0.47%	-18.4%	-7.2%
2001	381	71,893	0.53%	-13.8%	-12.8%
2000	442	82,400	0.54%	30.8%	10.2%
1999	338	74,801	0.45%	-1.2%	4.9%

Year	Total Travel Spending		Market Share (%)	Percent Change From Previous Year	
	Tennessee (\$ Millions)	U.S. (\$ Millions)		Tennessee (%)	U.S. (%)
2004	11,475	599,171	1.92%	5.8%	7.9%
2003	10,850	555,378	1.95%	2.3%	2.8%
2002	10,609	540,329	1.96%	1.0%	-1.9%
2001	10,507	550,909	1.91%	-0.6%	-5.1%
2000	10,566	580,795	1.82%	5.8%	7.2%
1999	9,990	541,950	1.84%	4.8%	6.0%

Sources: TIA, OTTI/ITA

TRAVEL IMPACT ON TENNESSEE – 2004

Tennessee Ranking * – Domestic Travel Expenditures

- In 2003, Tennessee ranked 14th in domestic travel spending among all 50 states and the District of Columbia.
- Among the ten states comprising the Discover America Travel Region of the South, Tennessee ranked 4th in domestic travel spending in 2003.
- Tennessee’s market share of domestic travel expenditures in the South region was 9.0 percent in 2003.

Table 8: Share of Domestic Travel Expenditures in the South Region by State, 2003

<u>State</u>	<u>Rank</u>	<u>Domestic Expenditures (\$ Millions)</u>	<u>Percent of South Region Total</u>
Florida	1	\$42,892.7	36.6%
Georgia	2	14,523.8	12.4%
North Carolina	3	12,631.5	10.8%
Tennessee	4	10,579.8	9.0%
Louisiana	5	9,055.0	7.7%
South Carolina	6	7,215.4	6.2%
Alabama	7	5,549.4	4.7%
Kentucky	8	5,432.6	4.6%
Mississippi	9	5,432.4	4.6%
Arkansas	10	3,846.3	3.3%
South Region Total		\$117,158.9	100.0%

Source: TIA

* Based on 2003 ranking, the latest available at this time.

Table 9: Ranking of the Top 20 U.S. States in 2003 by Domestic Travel Expenditures

State	Expenditures (\$ Millions)	Share of U.S. Total	Rank
California	\$61,074.5	12.4%	1
Florida	42,892.7	8.7%	2
Texas	31,471.0	6.4%	3
New York	27,726.1	5.6%	4
Illinois	21,594.7	4.4%	5
Nevada	19,319.1	3.9%	6
Pennsylvania	15,237.3	3.1%	7
New Jersey	14,727.5	3.0%	8
Georgia	14,523.8	3.0%	9
Virginia	13,890.0	2.8%	10
North Carolina	12,631.5	2.6%	11
Ohio	12,419.0	2.5%	12
Michigan	11,989.5	2.4%	13
Tennessee	10,579.8	2.2%	14
Massachusetts	9,952.3	2.0%	15
Colorado	9,193.2	1.9%	16
Missouri	9,177.2	1.9%	17
Arizona	9,153.0	1.9%	18
Louisiana	9,055.0	1.8%	19
Maryland	9,012.3	1.8%	20
Top 20 State Total	\$365,619.6	74.5%	
U.S. Total	\$490,869.7	100.0%	

Source: TIA

* Based on 2003 ranking, the latest available at this time.

TRAVEL IMPACT ON TENNESSEE – 2004

Travel-Generated Payroll

Travel-generated payroll is the wage and salary income paid to employees directly serving travelers within the industry sectors from which they 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.

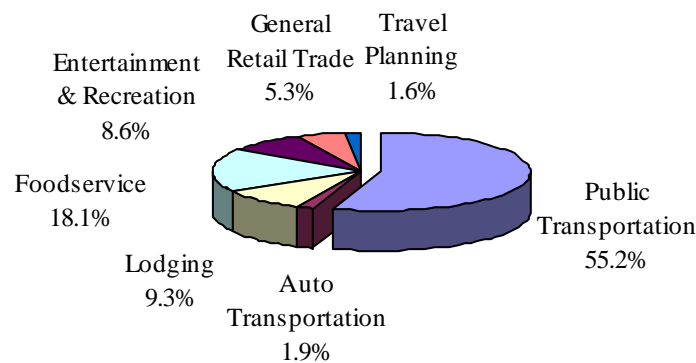
Payroll (wages and salaries) paid by Tennessee travel-related firms and directly attributable to domestic and international travel spending reached more than \$4.7 billion in 2004, up 1.4 percent from 2003.

The public transportation sector, including air couriers, posted the largest payroll generated by domestic travel spending in 2004, at nearly \$2.6 billion, up 0.9 percent from 2003

Payroll generated by domestic travel spending in the foodservice industry ranked second, totaling \$840 million.

The entertainment and recreation sector reported the largest payroll growth over 2003 with 7.1 percent, totaling \$402 million.

**Domestic Travel-Generated Payroll in Tennessee
by Industry Sector, 2004**



Travel-Generated Payroll

Table 10: Travel-Generated Payroll in Tennessee by Industry Sector, 2003-2004

<i>2004 Payroll</i>	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Public Transportation	\$2,565.0	55.2%
Auto Transportation	90.0	1.9%
Lodging	432.5	9.3%
Foodservice	839.8	18.1%
Entertainment & Recreation	402.1	8.6%
General Retail Trade	244.3	5.3%
Travel Planning *	76.2	1.6%
<hr/>		
Domestic Total	\$4,650.0	100.0%
International Total	85.6	
Grand Total **	\$4,735.5	
<i>2003 Payroll</i>		
Public Transportation	\$2,541.8	55.4%
Auto Transportation	86.7	1.9%
Lodging	427.0	9.3%
Foodservice	842.2	18.3%
Entertainment & Recreation	375.6	8.2%
General Retail Trade	241.3	5.3%
Travel Planning *	76.2	1.7%
<hr/>		
Domestic Total	\$4,590.9	100.0%
International Total	77.2	
Grand Total **	\$4,668.0	
Percentage Change, 2004 over 2003		
Public Transportation	0.9%	
Auto Transportation	3.8%	
Lodging	1.3%	
Foodservice	-0.3%	
Entertainment & Recreation	7.1%	
General Retail Trade	1.2%	
Travel Planning *	0.0%	
<hr/>		
Domestic Total	1.3%	
International Total	10.9%	
Grand Total **	1.4%	

Sources: TIA, OTTI/ITA

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

TRAVEL IMPACT ON TENNESSEE – 2004

Travel-Generated Employment

Perhaps the most impressive contribution of travel and tourism to the Tennessee economy is the number of businesses and jobs it supports. Due to the diversity of the travel industry in Tennessee, a wide variety of multi-level jobs are supported. These jobs include a large number of executive and managerial positions, as well as service-oriented occupations.

During 2004, more than 175.7 thousand domestic and international travel-related jobs were generated, including full-time and seasonal/part-time positions in the state. Total travel-generated employment in Tennessee decreased 0.8 percent from 2003, while international visitors spending generated employment jumped 8.4 percent.

The 175.7 thousand travel-related jobs comprised 6.5 percent of total non-agricultural employment in Tennessee in 2004. Without these jobs generated by travel, Tennessee's 2004 unemployment rate of 5.4 percent would have been 6.0 percentage points higher than it was, or 11.4 percent of the labor force.

Domestic travel spending in the foodservice sector generated more jobs than any other industry sector, accounting for 65.7 thousand jobs, and 38.3 percent of the state total.

Domestic Travel-Generated Employment in Tennessee by Industry Sector, 2004

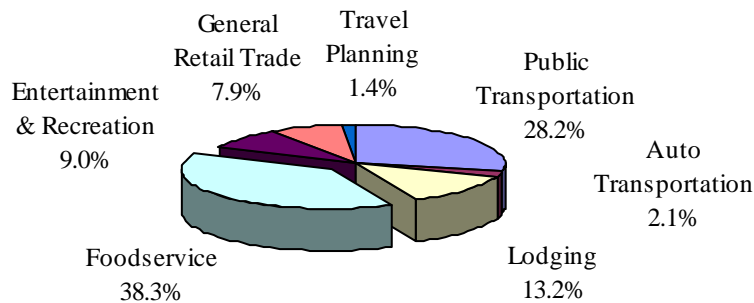


Table 11 Travel-Generated Employment in Tennessee by Industry Sector, 2003-2004

<i>2004 Employment</i>	<u>Domestic (Thousands)</u>	<u>% of Domestic Total</u>
Public Transportation	48.3	28.2%
Auto Transportation	3.6	2.1%
Lodging	22.6	13.2%
Foodservice	65.7	38.3%
Entertainment & Recreation	15.4	9.0%
General Retail Trade	13.6	7.9%
Travel Planning *	2.4	1.4%
<hr/>		
Domestic Total	171.5	
International Total	4.3	
Grand Total **	175.7	100.0%
 <i>2003 Employment</i>		
Public Transportation	50.9	29.4%
Auto Transportation	3.5	2.0%
Lodging	23.0	13.3%
Foodservice	65.3	37.7%
Entertainment & Recreation	14.7	8.5%
General Retail Trade	13.4	7.8%
Travel Planning *	2.4	1.4%
<hr/>		
Domestic Total	173.2	
International Total	3.9	
Grand Total **	177.1	100.0%
 <i>Percentage Change, 2004 over 2003</i>		
Public Transportation	-5.0%	
Auto Transportation	0.5%	
Lodging	-1.9%	
Foodservice	0.6%	
Entertainment & Recreation	4.6%	
General Retail Trade	1.3%	
Travel Planning *	0.0%	
<hr/>		
Domestic Total	-1.0%	
International Total	8.4%	
Grand Total **	-0.8%	

Sources: TIA, OTTI/ITA

Notes: *Refers to jobs created in travel arrangement firms such as travel agencies, wholesale and retail tour companies, and other travel-related service businesses. ** Total domestic employment and percent change from previous year may not match those in county tables due to rounding.

TRAVEL IMPACT ON TENNESSEE – 2004

Travel-Generated Tax Revenue

Travel tax receipts include the federal, state, and local tax revenue attributable to travel spending in Tennessee. Travel-related 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.

Travel-related spending by both domestic and international travelers in Tennessee generated nearly \$2.6 billion for the federal, state and local governments during 2004, up 2.8 percent from 2003.

Domestic traveler spending in Tennessee generated nearly \$1.6 billion in tax revenue for the federal government during 2004, up 2.0 percent from 2003. This represents 63.4 percent of all domestic travel-related tax collections in the state.

Domestic travel spending in Tennessee also generated nearly \$586 million in tax revenue for the state treasury through state sales and excise taxes, and taxes on personal and corporate income. This comprised 23.4 percent of all domestic travel-generated tax revenue for 2004 collected in the state.

Tennessee localities directly benefited from travel as well. During 2004, domestic travel spending generated nearly \$331 million in sales and property tax revenue for local governments, 13.2 percent of total domestic travel-generated tax revenue in the state. Each domestic travel dollar produced 3 cents for local tax coffers.

**Domestic Travel-Generated Tax Revenue
in Tennessee by Level of Government, 2004**

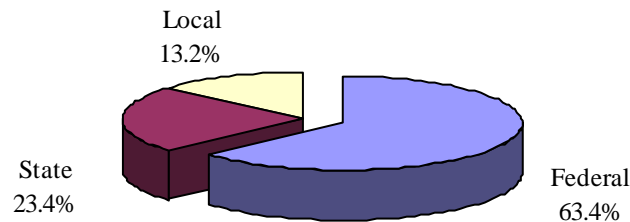


Table 12: Travel-Generated Tax Revenue in Tennessee by Level of Government, 2003-2004

<i>2004 Tax Revenue</i>	<u>Domestic (\$ millions)</u>	<u>% of Domestic Total</u>
Federal	\$1,588.8	63.4%
State	586.0	23.4%
Local	330.8	13.2%
Domestic Total	\$2,505.6	100.0%
International Total	66.0	
Grand Total	\$2,571.6	
<i>2003 Tax Revenue</i>		
Federal	\$1,557.6	63.8%
State	566.6	23.2%
Local	318.5	13.0%
Domestic Total	\$2,442.7	100.0%
International Total	58.8	
Grand Total	\$2,501.5	
<i>Percentage Change, 2004 over 2003</i>		
Federal	2.0%	
State	3.4%	
Local	3.9%	
Domestic Total	2.6%	
International Total	12.3%	
Grand Total	2.8%	

Sources: TIA, OTTI/ITA

MULTIPLIER IMPACT OF TRAVEL SPENDING IN TENNESSEE

Travelers in Tennessee produce “secondary” impacts over and above that of their original expenditures previously detailed. These secondary outputs (sales) and earnings (wage and salary income) arise from “indirect” and “induced” spending.

Indirect impact occurs as travel industry business operators, such as restaurants, purchase goods, such as food and beverages, and services, such as electricity and building maintenance, from local suppliers. These purchases generate additional output or sales indirectly.

Induced impact occurs as a result of the employees of businesses, and their suppliers, spending part of their earnings in the area. This spending itself generates sales additional to the indirect impact.

The sum of the indirect and induced effects comprises the total secondary impact of traveler expenditures in the area. The ratio of the sum of primary output generated (travel spending) plus secondary output to initial expenditures alone is commonly termed the sales or output “multiplier”.

During the secondary impact process, wage and salary income (earnings) are generated in addition to that produced by the initial travel expenditures as the suppliers employ labor to produce the additional output. The “earnings multiplier” is the ratio of the total primary and secondary earnings generated by the initial travel spending to that spending. Just as additional earnings are created, employment is also generated during the secondary impact process. The “employment multiplier” represents the number of jobs provided, directly and indirectly, for each one million dollars of output or expenditures generated.

Table 13 summarizes the direct, indirect and induced, and total impacts of travel spending on the Tennessee economy during 2003 and 2004.

In 2004, the \$11.5 billion spent directly by domestic and international travelers in Tennessee generated total output value of \$17.7 billion, up 4.5 percent from 2003. The ratio of total output to the initial spending is 1.54, the output multiplier. This indicates that the average travel dollar generated an additional 54 cents in secondary sales for a total impact of \$1.54.

In addition to \$4.7 billion payroll income generated by direct travel spending, nearly \$3.0 billion in earnings was produced in secondary impact in 2004. The ratio of total earnings generated to the initial spending is 0.67, the earnings multiplier. Each dollar of travel expenditures generated 67 cents in total earnings in the Tennessee economy.

Travel spending also produced 371.6 thousand jobs for Tennessee residents, including direct and secondary employment. The ratio of total employment generated to the initial spending is 32, the employment multiplier. This means that every million dollars in travel expenditures generated 32 jobs in Tennessee during 2004.

Table 13: Multiplier Impact of Travel Spending in Tennessee, 2003-2004

2004 Multiplier Impact

<u>Impact Measure</u>	<u>Direct Impact</u>	<u>Indirect & Induced Impact</u>	<u>Total Impact</u>
Expenditures (\$ millions)	\$11,475.4	\$6,193.0	\$17,668.4
Earnings (\$ millions)	\$4,735.5	\$2,968.9	\$7,704.5
Employment (thousands)	175.7	195.8	371.6

2003 Multiplier Impact

Expenditures (\$ millions)	\$10,849.8	\$6,057.8	\$16,907.6
Earnings (\$ millions)	\$4,668.0	\$2,945.1	\$7,613.1
Employment (thousands)	177.1	198.6	375.7

Percent Change

2004 over 2003

Expenditures	5.8%	2.2%	4.5%
Earnings	1.4%	0.8%	1.2%
Employment	-0.8%	-1.4%	-1.1%

Sources: U.S. Department of Commerce, Bureau of Economic Analysis, RIMS II; TIA

2004 DOMESTIC TRAVEL IMPACT ON TENNESSEE COUNTIES

During 2004, travel-related expenditures occurred throughout all ninety-five counties in Tennessee. Domestic travelers spent nearly \$11.2 billion while traveling in Tennessee, up 5.5 percent from 2003. Domestic travel-related industries in Tennessee received nearly \$4.7 billion in wages and salaries and generated 171.5 thousand jobs.

Additionally, domestic travel in Tennessee generated almost \$586 million in tax revenue for the state treasury and nearly \$331 million tax revenue for local governments during 2004.

Domestic Travel Impact in Top Five Counties

The top five counties in Tennessee received \$8.1 billion in direct domestic travel expenditures, 72.7 percent of the state total. The top five counties also earned more than \$4.0 billion in payroll (86.6 percent of the state total) and 139.8 thousand jobs (81.5 percent of the state total) in 2004.

Additionally, domestic travel in the top five counties generated more than \$402 million in tax revenue for the state treasury and nearly \$215 million tax revenue for local governments during 2004.

Davidson County, which includes the city of Nashville, led all counties in 2004. Domestic travel expenditures in Davidson registered over \$3.2 billion, accounting for 28.8 percent of the state total. Nearly \$1.6 billion in payroll income and 56.4 thousand jobs were created in this county.

Shelby County ranked second with nearly \$2.5 billion in domestic travel spending in 2004, representing 22.0 percent of the state total. The county's payroll income of nearly \$1.8 billion was paid to more than 49 thousand workers.

Sevier County posted more than \$1.2 billion in domestic expenditures to rank third. These expenditures generated nearly \$321 million in payroll as well as 17.7 thousand jobs within the county.

Knox County received more than \$637 million from U.S. travelers, 5.7 percent of the state total. This county benefited from more than \$235 million in wages and salaries and almost 9 thousand jobs.

Hamilton County ranked fifth with more than \$601 million in domestic travel expenditures, more than \$150 million in payroll income and nearly 7.4 thousand jobs within the county during 2004.

Table 14: Domestic Travel Impact in Tennessee - Top 5 Counties, 2003-2004

2004 Impact

County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
DAVIDSON	\$3,215.9	\$1,551.8	56.4	\$158.1	\$82.1
SHELBY	2,456.0	1,770.0	49.3	108.4	68.9
SEVIER	1,206.3	320.9	17.7	66.4	35.2
KNOX	637.1	235.5	9.0	34.4	15.3
HAMILTON	601.3	150.3	7.4	35.0	13.3
Top Five	\$8,116.6	\$4,028.4	139.8	\$402.3	\$214.7
STATE TOTALS	\$11,163.5	\$4,650.0	171.5	\$586.0	\$330.8
Share of Top 5 Counties	72.7%	86.6%	81.5%	68.7%	64.9%

2003 Impact

DAVIDSON	\$3,040.6	\$1,522.2	56.7	\$152.7	\$78.7
SHELBY	2,370.3	1,772.3	50.7	106.8	67.3
SEVIER	1,133.5	312.8	17.7	63.8	33.5
KNOX	599.0	229.7	9.0	33.0	14.6
HAMILTON	562.8	145.9	7.4	33.5	12.6
Top Five	\$7,706.3	\$3,982.8	141.4	\$389.7	\$206.7
STATE TOTALS	\$10,579.8	\$4,590.9	173.2	\$566.6	\$318.5
Share of Top 5 Counties	72.8%	86.8%	81.7%	68.8%	64.9%

**Percent Change
2004 Over 2003**

DAVIDSON	5.8%	1.9%	-0.6%	3.6%	4.4%
SHELBY	3.6%	-0.1%	-2.6%	1.5%	2.2%
SEVIER	6.4%	2.6%	0.0%	4.2%	5.0%
KNOX	6.4%	2.5%	0.0%	4.1%	4.9%
HAMILTON	6.8%	3.0%	0.4%	4.6%	5.4%
Top Five	5.3%	1.1%	-1.2%	3.2%	3.9%
STATE TOTALS	5.5%	1.3%	-1.0%	3.4%	3.9%

Source: TIA

COUNTY TABLES

The following tables list the results of the County Economic Impact Component of the TIA's Travel Economic Impact Model for Tennessee in 2004 and 2003. The estimates presented are for direct domestic travel expenditures and related economic impact.

Table A shows the counties listed alphabetically, with 2004 travel expenditures, travel-generated payroll and employment, and state tax revenue and the local tax revenue for each.

Table B ranks the counties in order of 2004 travel expenditures from highest to lowest.

Table C indicates the percent of the state totals accounted for by each county in 2004.

Table D shows the percent change in 2004 over 2003 estimates for each of the measures of economic impact.

Table E shows the counties, listed alphabetically, with 2003 travel expenditures, travel-generated payroll and employment, and state tax revenue and local tax revenue shown for each.

Table F shows the counties grouped by region with each measure of travel impact in 2004.

Table G indicates the counties grouped by region with 2004 and 2003 travel expenditures, shown with the percent change in 2004 over 2003.

Table H shows the percent change in 2004 over 2003 estimates, with the counties grouped by region.

Table I indicates the counties grouped by region, with 2003 estimates for each measure of travel impact.

Table J shows each measure of travel impact for each region in 2004.

Table K shows each measure of travel impact with 2003 estimates by each region.

Table L indicates the percent change in each measure of travel impact in 2004 over 2003 for each Tennessee region.

Table A: Alphabetical by County

2004 Impact of Travel on Tennessee					
Table A: Alphabetical by County					
<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>
ANDERSON	79.43	15.02	0.87	4.94	1.71
BEDFORD	20.77	4.05	0.21	1.24	0.81
BENTON	17.56	3.18	0.15	1.10	1.87
BLEDSON	2.73	0.44	0.02	0.16	0.44
BLOUNT	210.07	62.83	2.68	11.90	7.22
BRADLEY	90.17	16.71	0.98	5.61	1.92
CAMPBELL	39.70	7.87	0.44	2.32	2.06
CANNON	3.01	0.33	0.01	0.19	0.21
CARROLL	13.10	2.03	0.11	0.80	0.50
CARTER	22.94	3.55	0.16	1.44	1.44
CHEATHAM	13.53	2.66	0.13	0.79	0.46
CHESTER	6.73	0.78	0.03	0.46	0.21
CLAIBORNE	12.14	2.31	0.12	0.71	0.91
CLAY	5.71	1.41	0.05	0.32	0.50
COCKE	30.57	6.50	0.41	1.80	1.36
COFFEE	53.69	10.66	0.60	3.23	1.41
CROCKETT	5.83	1.04	0.06	0.34	0.26
CUMBERLAND	81.34	19.60	1.01	4.71	3.41
DAVIDSON	3,215.90	1,551.76	56.39	158.11	82.14
DECATUR	8.53	1.28	0.04	0.52	1.51
DEKALB	27.78	6.13	0.26	1.60	3.65
DICKSON	39.64	7.76	0.48	2.39	0.97
DYER	30.10	5.69	0.34	1.88	0.71
FAYETTE	5.13	0.72	0.03	0.31	0.28
FENTRESS	9.62	1.69	0.09	0.57	0.65
FRANKLIN	15.10	2.55	0.12	0.95	0.71
GIBSON	25.84	3.46	0.18	1.71	0.77

Table A: Alphabetical by County

2004 Impact of Travel on Tennessee						
Table A: Alphabetical by County (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>	
GILES	17.05	2.78	0.15	1.07	0.74	
GRAINGER	11.43	2.00	0.08	0.66	2.21	
GREENE	58.81	10.76	0.55	3.63	1.57	
GRUNDY	6.06	0.81	0.02	0.38	1.07	
HAMBLEN	62.61	10.92	0.58	3.99	1.38	
HAMILTON	601.31	150.28	7.38	34.99	13.26	
HANCOCK	0.94	0.13	0.01	0.06	0.20	
HARDEMAN	17.56	2.80	0.14	1.09	1.00	
HARDIN	25.23	4.69	0.19	1.54	2.15	
HAWKINS	24.78	4.26	0.22	1.45	1.37	
HAYWOOD	10.65	1.71	0.08	0.67	0.47	
HENDERSON	15.97	2.56	0.14	1.00	0.51	
HENRY	39.92	7.52	0.31	2.35	5.11	
HICKMAN	5.55	0.92	0.04	0.33	0.53	
HOUSTON	4.31	0.76	0.04	0.25	0.47	
HUMPHREYS	24.20	5.09	0.26	1.31	1.59	
JACKSON	1.80	0.28	0.01	0.11	0.22	
JEFFERSON	34.19	6.81	0.34	2.08	2.50	
JOHNSON	7.71	1.49	0.07	0.45	0.59	
KNOX	637.09	235.46	8.97	34.36	15.29	
LAKE	8.13	1.92	0.11	0.46	0.61	
LAUDERDALE	12.40	1.84	0.09	0.74	0.99	
LAWRENCE	28.49	4.74	0.23	1.81	0.78	
LEWIS	4.36	0.78	0.05	0.26	0.21	
LINCOLN	15.17	2.41	0.13	0.97	0.48	
LOUDON	29.98	5.54	0.31	1.85	0.76	
MCMINN	29.79	4.95	0.28	1.82	0.74	

Table A: Alphabetical by County

2004 Impact of Travel on Tennessee						
Table A: Alphabetical by County (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>	
MCNAIRY	7.40	1.18	0.05	0.44	0.41	
MACON	5.11	0.86	0.05	0.30	0.27	
MADISON	129.40	27.52	1.60	7.75	2.79	
MARION	23.63	4.40	0.25	1.42	0.86	
MARSHALL	17.81	3.41	0.17	1.12	0.47	
MAURY	72.63	11.61	0.63	4.49	1.52	
MEIGS	5.83	1.14	0.04	0.33	0.76	
MONROE	29.77	5.80	0.30	1.76	2.02	
MONTGOMERY	118.18	22.29	1.24	7.51	2.26	
MOORE	1.07	0.18	0.01	0.06	0.06	
MORGAN	3.43	0.42	0.01	0.21	0.44	
OBION	34.91	6.59	0.35	2.12	1.05	
OVERTON	6.00	0.95	0.04	0.38	0.38	
PERRY	4.91	0.78	0.02	0.26	1.29	
PICKETT	5.74	1.38	0.05	0.33	0.84	
POLK	16.89	4.49	0.19	0.96	1.56	
PUTNAM	78.33	14.13	0.83	4.77	1.60	
RHEA	23.95	4.72	0.24	1.42	1.60	
ROANE	44.89	7.94	0.44	2.74	2.33	
ROBERTSON	25.52	4.08	0.21	1.68	0.69	
RUTHERFORD	177.08	32.72	1.87	10.94	3.80	
SCOTT	8.91	1.53	0.09	0.50	0.53	
SEQUATCHIE	4.99	0.83	0.03	0.30	0.37	
SEVIER	1,206.31	320.85	17.72	66.45	35.17	
SHELBY	2,455.99	1,770.02	49.33	108.38	68.85	
SMITH	7.53	1.09	0.05	0.47	0.33	
STEWART	5.78	0.86	0.03	0.34	0.86	

Table A: Alphabetical by County

2004 Impact of Travel on Tennessee					
Table A: Alphabetical by County (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>
SULLIVAN	219.03	68.05	2.76	12.36	6.00
SUMNER	72.72	13.54	0.75	4.52	1.67
TIPTON	19.08	2.92	0.15	1.22	0.62
TROUSDALE	2.60	0.33	0.02	0.16	0.09
UNICOI	6.17	1.48	0.07	0.35	0.50
UNION	5.08	0.91	0.03	0.30	0.76
VAN BUREN	7.14	1.81	0.07	0.40	0.75
WARREN	20.78	3.63	0.18	1.26	0.83
WASHINGTON	157.43	31.14	1.72	9.48	3.67
WAYNE	8.20	1.59	0.07	0.48	0.52
WEAKLEY	13.63	2.18	0.11	0.84	0.46
WHITE	13.33	1.64	0.07	0.87	0.63
WILLIAMSON	195.10	36.82	2.05	11.76	4.00
WILSON	79.08	15.96	0.83	4.79	2.34
STATE TOTALS	\$11,163.51	\$4,649.95	171.47	\$585.97	\$330.84

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Table B: Ranking of Counties by Expenditure Levels

2004 Impact of Travel on Tennessee					
Table B: Ranking of Counties by Expenditure Levels					
<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>
DAVIDSON	\$3,215.90	\$1,551.76	56.39	\$158.11	\$82.14
SHELBY	2,455.99	1,770.02	49.33	108.38	68.85
SEVIER	1,206.31	320.85	17.72	66.45	35.17
KNOX	637.09	235.46	8.97	34.36	15.29
HAMILTON	601.31	150.28	7.38	34.99	13.26
SULLIVAN	219.03	68.05	2.76	12.36	6.00
BLOUNT	210.07	62.83	2.68	11.90	7.22
WILLIAMSON	195.10	36.82	2.05	11.76	4.00
RUTHERFORD	177.08	32.72	1.87	10.94	3.80
WASHINGTON	157.43	31.14	1.72	9.48	3.67
MADISON	129.40	27.52	1.60	7.75	2.79
MONTGOMERY	118.18	22.29	1.24	7.51	2.26
BRADLEY	90.17	16.71	0.98	5.61	1.92
CUMBERLAND	81.34	19.60	1.01	4.71	3.41
ANDERSON	79.43	15.02	0.87	4.94	1.71
WILSON	79.08	15.96	0.83	4.79	2.34
PUTNAM	78.33	14.13	0.83	4.77	1.60
SUMNER	72.72	13.54	0.75	4.52	1.67
MAURY	72.63	11.61	0.63	4.49	1.52
HAMBLEN	62.61	10.92	0.58	3.99	1.38
GREENE	58.81	10.76	0.55	3.63	1.57
COFFEE	53.69	10.66	0.60	3.23	1.41
ROANE	44.89	7.94	0.44	2.74	2.33
HENRY	39.92	7.52	0.31	2.35	5.11
CAMPBELL	39.70	7.87	0.44	2.32	2.06
DICKSON	39.64	7.76	0.48	2.39	0.97
OBION	34.91	6.59	0.35	2.12	1.05

Table B: Ranking of Counties by Expenditure Levels

2004 Impact of Travel on Tennessee						
Table B: Ranking of Counties by Expenditure Levels (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>	
JEFFERSON	34.19	6.81	0.34	2.08	2.50	
COCKE	30.57	6.50	0.41	1.80	1.36	
DYER	30.10	5.69	0.34	1.88	0.71	
LOUDON	29.98	5.54	0.31	1.85	0.76	
MCMINN	29.79	4.95	0.28	1.82	0.74	
MONROE	29.77	5.80	0.30	1.76	2.02	
LAWRENCE	28.49	4.74	0.23	1.81	0.78	
DEKALB	27.78	6.13	0.26	1.60	3.65	
GIBSON	25.84	3.46	0.18	1.71	0.77	
ROBERTSON	25.52	4.08	0.21	1.68	0.69	
HARDIN	25.23	4.69	0.19	1.54	2.15	
HAWKINS	24.78	4.26	0.22	1.45	1.37	
HUMPHREYS	24.20	5.09	0.26	1.31	1.59	
RHEA	23.95	4.72	0.24	1.42	1.60	
MARION	23.63	4.40	0.25	1.42	0.86	
CARTER	22.94	3.55	0.16	1.44	1.44	
WARREN	20.78	3.63	0.18	1.26	0.83	
BEDFORD	20.77	4.05	0.21	1.24	0.81	
TIPTON	19.08	2.92	0.15	1.22	0.62	
MARSHALL	17.81	3.41	0.17	1.12	0.47	
HARDEMAN	17.56	2.80	0.14	1.09	1.00	
BENTON	17.56	3.18	0.15	1.10	1.87	
GILES	17.05	2.78	0.15	1.07	0.74	
POLK	16.89	4.49	0.19	0.96	1.56	
HENDERSON	15.97	2.56	0.14	1.00	0.51	
LINCOLN	15.17	2.41	0.13	0.97	0.48	
FRANKLIN	15.10	2.55	0.12	0.95	0.71	

Table B: Ranking of Counties by Expenditure Levels

2004 Impact of Travel on Tennessee						
Table B: Ranking of Counties by Expenditure Levels (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>	
WEAKLEY	13.63	2.18	0.11	0.84	0.46	
CHEATHAM	13.53	2.66	0.13	0.79	0.46	
WHITE	13.33	1.64	0.07	0.87	0.63	
CARROLL	13.10	2.03	0.11	0.80	0.50	
LAUDERDALE	12.40	1.84	0.09	0.74	0.99	
CLAIBORNE	12.14	2.31	0.12	0.71	0.91	
GRAINGER	11.43	2.00	0.08	0.66	2.21	
HAYWOOD	10.65	1.71	0.08	0.67	0.47	
FENTRESS	9.62	1.69	0.09	0.57	0.65	
SCOTT	8.91	1.53	0.09	0.50	0.53	
DECATUR	8.53	1.28	0.04	0.52	1.51	
WAYNE	8.20	1.59	0.07	0.48	0.52	
LAKE	8.13	1.92	0.11	0.46	0.61	
JOHNSON	7.71	1.49	0.07	0.45	0.59	
SMITH	7.53	1.09	0.05	0.47	0.33	
MCNAIRY	7.40	1.18	0.05	0.44	0.41	
VAN BUREN	7.14	1.81	0.07	0.40	0.75	
CHESTER	6.73	0.78	0.03	0.46	0.21	
UNICOI	6.17	1.48	0.07	0.35	0.50	
GRUNDY	6.06	0.81	0.02	0.38	1.07	
OVERTON	6.00	0.95	0.04	0.38	0.38	
CROCKETT	5.83	1.04	0.06	0.34	0.26	
MEIGS	5.83	1.14	0.04	0.33	0.76	
STEWART	5.78	0.86	0.03	0.34	0.86	
PICKETT	5.74	1.38	0.05	0.33	0.84	
CLAY	5.71	1.41	0.05	0.32	0.50	
HICKMAN	5.55	0.92	0.04	0.33	0.53	

Table B: Ranking of Counties by Expenditure Levels

2004 Impact of Travel on Tennessee						
Table B: Ranking of Counties by Expenditure Levels (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>	
FAYETTE	5.13	0.72	0.03	0.31	0.28	
MACON	5.11	0.86	0.05	0.30	0.27	
UNION	5.08	0.91	0.03	0.30	0.76	
SEQUATCHIE	4.99	0.83	0.03	0.30	0.37	
PERRY	4.91	0.78	0.02	0.26	1.29	
LEWIS	4.36	0.78	0.05	0.26	0.21	
HOUSTON	4.31	0.76	0.04	0.25	0.47	
MORGAN	3.43	0.42	0.01	0.21	0.44	
CANNON	3.01	0.33	0.01	0.19	0.21	
BLEDSON	2.73	0.44	0.02	0.16	0.44	
TROUSDALE	2.60	0.33	0.02	0.16	0.09	
JACKSON	1.80	0.28	0.01	0.11	0.22	
MOORE	1.07	0.18	0.01	0.06	0.06	
HANCOCK	0.94	0.13	0.01	0.06	0.20	
STATE TOTALS	\$11,163.51	\$4,649.95	171.47	\$585.97	\$330.84	

C2005 TIA

Table C: Percent Distribution by County

2004 Impact of Travel on Tennessee					
Table C: Percent Distribution by County					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ANDERSON	0.71%	0.32%	0.51%	0.84%	0.52%
BEDFORD	0.19%	0.09%	0.12%	0.21%	0.24%
BENTON	0.16%	0.07%	0.09%	0.19%	0.57%
BLEDSON	0.02%	0.01%	0.01%	0.03%	0.13%
BLOUNT	1.88%	1.35%	1.56%	2.03%	2.18%
BRADLEY	0.81%	0.36%	0.57%	0.96%	0.58%
CAMPBELL	0.36%	0.17%	0.26%	0.40%	0.62%
CANNON	0.03%	0.01%	0.01%	0.03%	0.06%
CARROLL	0.12%	0.04%	0.06%	0.14%	0.15%
CARTER	0.21%	0.08%	0.09%	0.25%	0.44%
CHEATHAM	0.12%	0.06%	0.07%	0.13%	0.14%
CHESTER	0.06%	0.02%	0.02%	0.08%	0.06%
CLAIBORNE	0.11%	0.05%	0.07%	0.12%	0.28%
CLAY	0.05%	0.03%	0.03%	0.05%	0.15%
COCKE	0.27%	0.14%	0.24%	0.31%	0.41%
COFFEE	0.48%	0.23%	0.35%	0.55%	0.43%
CROCKETT	0.05%	0.02%	0.04%	0.06%	0.08%
CUMBERLAND	0.73%	0.42%	0.59%	0.80%	1.03%
DAVIDSON	28.81%	33.37%	32.88%	26.98%	24.83%
DECATUR	0.08%	0.03%	0.02%	0.09%	0.46%
DEKALB	0.25%	0.13%	0.15%	0.27%	1.10%
DICKSON	0.36%	0.17%	0.28%	0.41%	0.29%
DYER	0.27%	0.12%	0.20%	0.32%	0.21%
FAYETTE	0.05%	0.02%	0.02%	0.05%	0.09%
FENTRESS	0.09%	0.04%	0.05%	0.10%	0.20%
FRANKLIN	0.14%	0.05%	0.07%	0.16%	0.21%
GIBSON	0.23%	0.07%	0.10%	0.29%	0.23%

Table C: Percent Distribution by County

2004 Impact of Travel on Tennessee					
Table C: Percent Distribution by County (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
GILES	0.15%	0.06%	0.09%	0.18%	0.22%
GRAINGER	0.10%	0.04%	0.05%	0.11%	0.67%
GREENE	0.53%	0.23%	0.32%	0.62%	0.47%
GRUNDY	0.05%	0.02%	0.01%	0.06%	0.32%
HAMBLEN	0.56%	0.23%	0.34%	0.68%	0.42%
HAMILTON	5.39%	3.23%	4.31%	5.97%	4.01%
HANCOCK	0.01%	0.00%	0.01%	0.01%	0.06%
HARDEMAN	0.16%	0.06%	0.08%	0.19%	0.30%
HARDIN	0.23%	0.10%	0.11%	0.26%	0.65%
HAWKINS	0.22%	0.09%	0.13%	0.25%	0.41%
HAYWOOD	0.10%	0.04%	0.05%	0.12%	0.14%
HENDERSON	0.14%	0.06%	0.08%	0.17%	0.15%
HENRY	0.36%	0.16%	0.18%	0.40%	1.54%
HICKMAN	0.05%	0.02%	0.02%	0.06%	0.16%
HOUSTON	0.04%	0.02%	0.02%	0.04%	0.14%
HUMPHREYS	0.22%	0.11%	0.15%	0.22%	0.48%
JACKSON	0.02%	0.01%	0.01%	0.02%	0.07%
JEFFERSON	0.31%	0.15%	0.20%	0.35%	0.76%
JOHNSON	0.07%	0.03%	0.04%	0.08%	0.18%
KNOX	5.71%	5.06%	5.23%	5.86%	4.62%
LAKE	0.07%	0.04%	0.07%	0.08%	0.18%
LAUDERDALE	0.11%	0.04%	0.05%	0.13%	0.30%
LAWRENCE	0.26%	0.10%	0.13%	0.31%	0.24%
LEWIS	0.04%	0.02%	0.03%	0.04%	0.06%
LINCOLN	0.14%	0.05%	0.07%	0.17%	0.15%
LOUDON	0.27%	0.12%	0.18%	0.32%	0.23%
MCMINN	0.27%	0.11%	0.16%	0.31%	0.22%

Table C: Percent Distribution by County

2004 Impact of Travel on Tennessee					
Table C: Percent Distribution by County (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MCNAIRY	0.07%	0.03%	0.03%	0.08%	0.13%
MACON	0.05%	0.02%	0.03%	0.05%	0.08%
MADISON	1.16%	0.59%	0.93%	1.32%	0.84%
MARION	0.21%	0.09%	0.15%	0.24%	0.26%
MARSHALL	0.16%	0.07%	0.10%	0.19%	0.14%
MAURY	0.65%	0.25%	0.37%	0.77%	0.46%
MEIGS	0.05%	0.02%	0.02%	0.06%	0.23%
MONROE	0.27%	0.12%	0.17%	0.30%	0.61%
MONTGOMERY	1.06%	0.48%	0.72%	1.28%	0.68%
MOORE	0.01%	0.00%	0.01%	0.01%	0.02%
MORGAN	0.03%	0.01%	0.01%	0.04%	0.13%
OBION	0.31%	0.14%	0.20%	0.36%	0.32%
OVERTON	0.05%	0.02%	0.03%	0.06%	0.11%
PERRY	0.04%	0.02%	0.01%	0.04%	0.39%
PICKETT	0.05%	0.03%	0.03%	0.06%	0.25%
POLK	0.15%	0.10%	0.11%	0.16%	0.47%
PUTNAM	0.70%	0.30%	0.48%	0.81%	0.48%
RHEA	0.21%	0.10%	0.14%	0.24%	0.48%
ROANE	0.40%	0.17%	0.25%	0.47%	0.71%
ROBERTSON	0.23%	0.09%	0.12%	0.29%	0.21%
RUTHERFORD	1.59%	0.70%	1.09%	1.87%	1.15%
SCOTT	0.08%	0.03%	0.05%	0.09%	0.16%
SEQUATCHIE	0.04%	0.02%	0.02%	0.05%	0.11%
SEVIER	10.81%	6.90%	10.33%	11.34%	10.63%
SHELBY	22.00%	38.07%	28.77%	18.50%	20.81%
SMITH	0.07%	0.02%	0.03%	0.08%	0.10%
STEWART	0.05%	0.02%	0.02%	0.06%	0.26%

Table C: Percent Distribution by County

2004 Impact of Travel on Tennessee					
Table C: Percent Distribution by County (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SULLIVAN	1.96%	1.46%	1.61%	2.11%	1.81%
SUMNER	0.65%	0.29%	0.44%	0.77%	0.50%
TIPTON	0.17%	0.06%	0.09%	0.21%	0.19%
TROUSDALE	0.02%	0.01%	0.01%	0.03%	0.03%
UNICOI	0.06%	0.03%	0.04%	0.06%	0.15%
UNION	0.05%	0.02%	0.02%	0.05%	0.23%
VAN BUREN	0.06%	0.04%	0.04%	0.07%	0.23%
WARREN	0.19%	0.08%	0.10%	0.22%	0.25%
WASHINGTON	1.41%	0.67%	1.00%	1.62%	1.11%
WAYNE	0.07%	0.03%	0.04%	0.08%	0.16%
WEAKLEY	0.12%	0.05%	0.07%	0.14%	0.14%
WHITE	0.12%	0.04%	0.04%	0.15%	0.19%
WILLIAMSON	1.75%	0.79%	1.19%	2.01%	1.21%
WILSON	0.71%	0.34%	0.49%	0.82%	0.71%
STATE TOTALS	100.00%	100.00%	100.00%	100.00%	100.00%

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Table D: Percent Change Over 2003

2004 Impact of Travel on Tennessee					
Table D: Percent Change Over 2003					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
ANDERSON	10.88%	6.88%	4.22%	8.57%	9.41%
BEDFORD	5.82%	2.00%	-0.54%	3.61%	4.42%
BENTON	2.07%	-1.62%	-4.07%	-0.06%	0.71%
BLEDSON	2.22%	-1.47%	-3.92%	0.09%	0.86%
BLOUNT	8.39%	4.47%	1.87%	6.12%	6.95%
BRADLEY	4.90%	1.11%	-1.40%	2.71%	3.51%
CAMPBELL	1.51%	-2.16%	-4.60%	-0.61%	0.16%
CANNON	4.75%	0.97%	-1.55%	2.56%	3.36%
CARROLL	5.33%	1.52%	-1.01%	3.13%	3.93%
CARTER	5.80%	1.98%	-0.56%	3.59%	4.40%
CHEATHAM	5.79%	1.97%	-0.57%	3.58%	4.38%
CHESTER	8.09%	4.19%	1.59%	5.84%	6.66%
CLAIBORNE	3.85%	0.10%	-2.40%	1.68%	2.47%
CLAY	2.14%	-1.55%	-4.00%	0.01%	0.79%
COCKE	2.53%	-1.18%	-3.64%	0.39%	1.17%
COFFEE	6.80%	2.95%	0.38%	4.57%	5.38%
CROCKETT	3.78%	0.03%	-2.46%	1.61%	2.40%
CUMBERLAND	7.95%	4.05%	1.46%	5.70%	6.51%
DAVIDSON	5.76%	1.94%	-0.59%	3.56%	4.36%
DECATUR	4.89%	1.10%	-1.41%	2.70%	3.50%
DEKALB	2.24%	-1.46%	-3.91%	0.10%	0.88%
DICKSON	3.62%	-0.12%	-2.61%	1.45%	2.24%
DYER	5.93%	2.10%	-0.44%	3.72%	4.52%
FAYETTE	4.11%	0.35%	-2.15%	1.94%	2.73%
FENTRESS	4.30%	0.53%	-1.97%	2.12%	2.91%
FRANKLIN	4.28%	0.52%	-1.99%	2.11%	2.90%
GIBSON	5.48%	1.67%	-0.87%	3.27%	4.07%

Table D: Percent Change Over 2003

2004 Impact of Travel on Tennessee					
Table D: Percent Change Over 2003 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
GILES	7.99%	4.09%	1.50%	5.74%	6.55%
GRAINGER	2.71%	-1.00%	-3.47%	0.56%	1.34%
GREENE	7.74%	3.85%	1.26%	5.49%	6.31%
GRUNDY	4.90%	1.11%	-1.40%	2.71%	3.51%
HAMBLEN	7.49%	3.61%	1.03%	5.25%	6.07%
HAMILTON	6.84%	2.98%	0.42%	4.61%	5.42%
HANCOCK	4.85%	1.07%	-1.45%	2.66%	3.46%
HARDEMAN	2.50%	-1.20%	-3.66%	0.36%	1.14%
HARDIN	1.17%	-2.48%	-4.91%	-0.94%	-0.17%
HAWKINS	7.14%	3.27%	0.70%	4.90%	5.71%
HAYWOOD	5.39%	1.59%	-0.94%	3.19%	3.99%
HENDERSON	4.68%	0.89%	-1.62%	2.49%	3.28%
HENRY	6.68%	2.83%	0.27%	4.46%	5.26%
HICKMAN	2.95%	-0.77%	-3.24%	0.80%	1.58%
HOUSTON	2.88%	-0.83%	-3.30%	0.74%	1.52%
HUMPHREYS	8.91%	4.98%	2.37%	6.64%	7.47%
JACKSON	3.14%	-0.59%	-3.06%	0.99%	1.77%
JEFFERSON	3.35%	-0.38%	-2.86%	1.20%	1.98%
JOHNSON	2.38%	-1.32%	-3.77%	0.24%	1.02%
KNOX	6.36%	2.52%	-0.04%	4.14%	4.94%
LAKE	2.20%	-1.49%	-3.94%	0.07%	0.85%
LAUDERDALE	3.05%	-0.67%	-3.14%	0.90%	1.68%
LAWRENCE	6.86%	3.00%	0.43%	4.63%	5.44%
LEWIS	1.56%	-2.11%	-4.55%	-0.56%	0.21%
LINCOLN	5.15%	1.36%	-1.17%	2.96%	3.76%
LOUDON	7.06%	3.19%	0.62%	4.83%	5.64%
MCMINN	5.82%	2.00%	-0.54%	3.61%	4.42%

Table D: Percent Change Over 2003

2004 Impact of Travel on Tennessee					
Table D: Percent Change Over 2003 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MCNAIRY	4.29%	0.52%	-1.98%	2.11%	2.90%
MACON	4.66%	0.88%	-1.63%	2.48%	3.27%
MADISON	3.31%	-0.42%	-2.90%	1.16%	1.94%
MARION	6.86%	3.00%	0.43%	4.63%	5.44%
MARSHALL	3.89%	0.14%	-2.35%	1.72%	2.51%
MAURY	3.70%	-0.05%	-2.54%	1.53%	2.32%
MEIGS	1.91%	-1.77%	-4.21%	-0.21%	0.56%
MONROE	3.68%	-0.07%	-2.56%	1.51%	2.30%
MONTGOMERY	7.14%	3.27%	0.70%	4.91%	5.72%
MOORE	2.61%	-1.09%	-3.56%	0.47%	1.25%
MORGAN	4.78%	0.99%	-1.52%	2.59%	3.38%
OBION	6.85%	2.99%	0.43%	4.62%	5.43%
OVERTON	6.73%	2.88%	0.32%	4.51%	5.32%
PERRY	2.45%	-1.25%	-3.71%	0.31%	1.08%
PICKETT	1.80%	-1.88%	-4.32%	-0.32%	0.45%
POLK	2.16%	-1.53%	-3.99%	0.02%	0.80%
PUTNAM	7.70%	3.81%	1.23%	5.45%	6.27%
RHEA	-0.01%	-3.62%	-6.02%	-2.10%	-1.34%
ROANE	6.11%	2.28%	-0.27%	3.90%	4.70%
ROBERTSON	8.01%	4.11%	1.52%	5.76%	6.58%
RUTHERFORD	7.46%	3.58%	1.00%	5.22%	6.03%
SCOTT	3.58%	-0.16%	-2.64%	1.42%	2.21%
SEQUATCHIE	2.76%	-0.95%	-3.41%	0.62%	1.40%
SEVIER	6.42%	2.58%	0.02%	4.20%	5.01%
SHELBY	3.62%	-0.13%	-2.61%	1.45%	2.24%
SMITH	2.56%	-1.15%	-3.61%	0.41%	1.19%
STEWART	3.91%	0.16%	-2.34%	1.74%	2.53%

Table D: Percent Change Over 2003

2004 Impact of Travel on Tennessee					
Table D: Percent Change Over 2003 (Continued)					
<u>County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
SULLIVAN	4.94%	1.15%	-1.37%	2.75%	3.55%
SUMNER	7.34%	3.47%	0.89%	5.10%	5.92%
TIPTON	6.38%	2.54%	-0.01%	4.16%	4.97%
TROUSDALE	4.42%	0.65%	-1.86%	2.24%	3.03%
UNICOI	-0.22%	-3.82%	-6.22%	-2.30%	-1.55%
UNION	3.01%	-0.71%	-3.18%	0.86%	1.64%
VAN BUREN	3.12%	-0.60%	-3.08%	0.97%	1.75%
WARREN	5.64%	1.83%	-0.71%	3.44%	4.24%
WASHINGTON	6.37%	2.53%	-0.02%	4.15%	4.96%
WAYNE	3.82%	0.07%	-2.42%	1.65%	2.44%
WEAKLEY	6.12%	2.28%	-0.26%	3.90%	4.71%
WHITE	6.92%	3.06%	0.49%	4.69%	5.50%
WILLIAMSON	8.02%	4.12%	1.53%	5.77%	6.59%
WILSON	8.35%	4.43%	1.83%	6.09%	6.91%
STATE TOTALS	5.52%	1.29%	-0.99%	3.41%	3.88%

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Table E: Alphabetical by County, 2003

2004 Impact of Travel on Tennessee					
Table E: Alphabetical by County, 2003					
<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>
ANDERSON	\$71.63	\$14.06	0.84	\$4.55	\$1.56
BEDFORD	19.63	3.97	0.21	1.19	0.78
BENTON	17.20	3.23	0.15	1.10	1.86
BLEDSON	2.67	0.45	0.02	0.16	0.43
BLOUNT	193.82	60.14	2.63	11.21	6.75
BRADLEY	85.95	16.53	1.00	5.46	1.85
CAMPBELL	39.11	8.04	0.47	2.33	2.06
CANNON	2.87	0.33	0.01	0.19	0.20
CARROLL	12.43	2.00	0.11	0.77	0.48
CARTER	21.68	3.48	0.16	1.39	1.38
CHEATHAM	12.79	2.61	0.13	0.76	0.44
CHESTER	6.23	0.75	0.03	0.43	0.20
CLAIBORNE	11.69	2.31	0.13	0.70	0.89
CLAY	5.59	1.43	0.06	0.32	0.50
COCKE	29.82	6.58	0.42	1.79	1.34
COFFEE	50.27	10.35	0.60	3.09	1.34
CROCKETT	5.62	1.04	0.06	0.33	0.25
CUMBERLAND	75.35	18.84	1.00	4.45	3.20
DAVIDSON	3,040.64	1,522.18	56.72	152.68	78.71
DECATUR	8.13	1.26	0.04	0.51	1.46
DEKALB	27.17	6.22	0.27	1.60	3.62
DICKSON	38.25	7.77	0.49	2.36	0.95
DYER	28.41	5.58	0.34	1.81	0.68
FAYETTE	4.93	0.71	0.03	0.30	0.27
FENTRESS	9.22	1.68	0.09	0.56	0.63
FRANKLIN	14.48	2.53	0.13	0.93	0.69
GIBSON	24.50	3.40	0.18	1.65	0.74

Table E: Alphabetical by County, 2003

2004 Impact of Travel on Tennessee						
Table E: Alphabetical by County, 2003 (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>	
GILES	15.79	2.67	0.15	1.02	0.69	
GRAINGER	11.13	2.02	0.08	0.65	2.18	
GREENE	54.58	10.36	0.54	3.44	1.48	
GRUNDY	5.77	0.81	0.02	0.37	1.04	
HAMBLEN	58.25	10.54	0.58	3.80	1.30	
HAMILTON	562.80	145.93	7.35	33.45	12.58	
HANCOCK	0.90	0.12	0.01	0.05	0.19	
HARDEMAN	17.13	2.84	0.15	1.08	0.99	
HARDIN	24.94	4.80	0.20	1.56	2.16	
HAWKINS	23.13	4.13	0.22	1.38	1.29	
HAYWOOD	10.11	1.68	0.09	0.65	0.45	
HENDERSON	15.25	2.54	0.14	0.98	0.49	
HENRY	37.42	7.32	0.31	2.25	4.85	
HICKMAN	5.39	0.92	0.04	0.32	0.53	
HOUSTON	4.19	0.77	0.04	0.25	0.46	
HUMPHREYS	22.22	4.85	0.25	1.22	1.48	
JACKSON	1.74	0.28	0.01	0.11	0.22	
JEFFERSON	33.08	6.83	0.35	2.05	2.45	
JOHNSON	7.53	1.51	0.07	0.45	0.59	
KNOX	599.01	229.68	8.97	33.00	14.57	
LAKE	7.96	1.94	0.12	0.46	0.60	
LAUDERDALE	12.04	1.85	0.09	0.73	0.98	
LAWRENCE	26.67	4.61	0.23	1.73	0.74	
LEWIS	4.29	0.79	0.05	0.26	0.21	
LINCOLN	14.42	2.38	0.13	0.94	0.47	
LOUDON	28.00	5.37	0.31	1.77	0.72	
MCMINN	28.15	4.85	0.28	1.76	0.71	

Table E: Alphabetical by County, 2003

2004 Impact of Travel on Tennessee						
Table E: Alphabetical by County, 2003 (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>	
MCNAIRY	7.10	1.17	0.05	0.43	0.40	
MACON	4.88	0.85	0.05	0.29	0.26	
MADISON	125.25	27.63	1.65	7.66	2.73	
MARION	22.11	4.27	0.25	1.36	0.82	
MARSHALL	17.14	3.40	0.17	1.10	0.46	
MAURY	70.04	11.62	0.65	4.42	1.48	
MEIGS	5.72	1.16	0.04	0.33	0.76	
MONROE	28.71	5.80	0.31	1.73	1.97	
MONTGOMERY	110.30	21.58	1.23	7.16	2.14	
MOORE	1.04	0.18	0.01	0.06	0.06	
MORGAN	3.27	0.42	0.01	0.21	0.42	
OBION	32.67	6.40	0.35	2.03	1.00	
OVERTON	5.62	0.92	0.04	0.36	0.36	
PERRY	4.79	0.79	0.02	0.26	1.27	
PICKETT	5.64	1.41	0.06	0.33	0.84	
POLK	16.54	4.56	0.20	0.96	1.55	
PUTNAM	72.73	13.61	0.82	4.53	1.50	
RHEA	23.95	4.90	0.26	1.45	1.62	
ROANE	42.31	7.76	0.44	2.64	2.23	
ROBERTSON	23.63	3.92	0.21	1.59	0.64	
RUTHERFORD	164.79	31.59	1.85	10.40	3.58	
SCOTT	8.60	1.53	0.09	0.49	0.52	
SEQUATCHIE	4.86	0.83	0.03	0.30	0.36	
SEVIER	1,133.54	312.80	17.71	63.77	33.49	
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34	
SMITH	7.34	1.11	0.05	0.47	0.33	
STEWART	5.56	0.86	0.03	0.34	0.84	

Table E: Alphabetical by County, 2003

2004 Impact of Travel on Tennessee					
Table E: Alphabetical by County, 2003 (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>
SULLIVAN	208.72	67.27	2.80	12.02	5.80
SUMNER	67.75	13.09	0.74	4.30	1.57
TIPTON	17.93	2.84	0.15	1.17	0.59
TROUSDALE	2.49	0.33	0.02	0.15	0.08
UNICOI	6.18	1.54	0.08	0.36	0.51
UNION	4.93	0.92	0.03	0.29	0.74
VAN BUREN	6.92	1.82	0.07	0.40	0.74
WARREN	19.67	3.57	0.18	1.22	0.80
WASHINGTON	148.00	30.37	1.72	9.11	3.49
WAYNE	7.90	1.59	0.08	0.48	0.51
WEAKLEY	12.85	2.13	0.11	0.81	0.44
WHITE	12.47	1.60	0.07	0.83	0.60
WILLIAMSON	180.61	35.36	2.01	11.12	3.76
WILSON	72.99	15.28	0.82	4.52	2.19
STATE TOTALS	\$10,579.80	\$4,590.88	173.19	\$566.62	\$318.48

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Table F: Alphabetical by Region, 2004

2004 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2004					
<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
NORTHEAST TENNESSEE REGION					
CARTER	\$22.94	\$3.55	0.16	\$1.44	\$1.44
GREENE	58.81	10.76	0.55	3.63	1.57
HANCOCK	0.94	0.13	0.01	0.06	0.20
HAWKINS	24.78	4.26	0.22	1.45	1.37
JOHNSON	7.71	1.49	0.07	0.45	0.59
SULLIVAN	219.03	68.05	2.76	12.36	6.00
UNICOI	6.17	1.48	0.07	0.35	0.50
WASHINGTON	157.43	31.14	1.72	9.48	3.67
Total	\$497.81	\$120.86	5.56	\$29.22	\$15.34
EAST TENNESSEE REGION					
ANDERSON	\$79.43	\$15.02	0.87	\$4.94	\$1.71
BLOUNT	210.07	62.83	2.68	11.90	7.22
CAMPBELL	39.70	7.87	0.44	2.32	2.06
CLAIBORNE	12.14	2.31	0.12	0.71	0.91
COCKE	30.57	6.50	0.41	1.80	1.36
GRAINGER	11.43	2.00	0.08	0.66	2.21
HAMBLEN	62.61	10.92	0.58	3.99	1.38
JEFFERSON	34.19	6.81	0.34	2.08	2.50
KNOX	637.09	235.46	8.97	34.36	15.29
LOUDON	29.98	5.54	0.31	1.85	0.76
MONROE	29.77	5.80	0.30	1.76	2.02
MORGAN	3.43	0.42	0.01	0.21	0.44
ROANE	44.89	7.94	0.44	2.74	2.33
SCOTT	8.91	1.53	0.09	0.50	0.53
SEVIER	1,206.31	320.85	17.72	66.45	35.17
UNION	5.08	0.91	0.03	0.30	0.76
Total	\$2,445.60	\$692.71	33.39	\$136.55	\$76.64

Table F: Alphabetical by Region, 2004

2004 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2004 (Continued)					
<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
UPPER CUMBERLAND REGION					
CANNON	\$3.01	\$0.33	0.01	\$0.19	\$0.21
CLAY	5.71	1.41	0.05	0.32	0.50
CUMBERLAND	81.34	19.60	1.01	4.71	3.41
DEKALB	27.78	6.13	0.26	1.60	3.65
FENTRESS	9.62	1.69	0.09	0.57	0.65
JACKSON	1.80	0.28	0.01	0.11	0.22
MACON	5.11	0.86	0.05	0.30	0.27
OVERTON	6.00	0.95	0.04	0.38	0.38
PICKETT	5.74	1.38	0.05	0.33	0.84
PUTNAM	78.33	14.13	0.83	4.77	1.60
SMITH	7.53	1.09	0.05	0.47	0.33
VAN BUREN	7.14	1.81	0.07	0.40	0.75
WARREN	20.78	3.63	0.18	1.26	0.83
WHITE	13.33	1.64	0.07	0.87	0.63
Total	\$273.21	\$54.94	2.78	\$16.29	\$14.27
SOUTHEAST TENNESSEE REGION					
BLED SOE	\$2.73	\$0.44	0.02	\$0.16	\$0.44
BRADLEY	90.17	16.71	0.98	5.61	1.92
GRUNDY	6.06	0.81	0.02	0.38	1.07
HAMILTON	601.31	150.28	7.38	34.99	13.26
MCMINN	29.79	4.95	0.28	1.82	0.74
MARION	23.63	4.40	0.25	1.42	0.86
MEIGS	5.83	1.14	0.04	0.33	0.76
POLK	16.89	4.49	0.19	0.96	1.56
RHEA	23.95	4.72	0.24	1.42	1.60
SEQUATCHIE	4.99	0.83	0.03	0.30	0.37
Total	\$805.35	\$188.77	9.44	\$47.39	\$22.57

Table F: Alphabetical by Region, 2004

2004 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2004 (Continued)					
<u>Region/County</u>	<u>Expenditures</u> <u>(\$ Millions)</u>	<u>Payroll</u> <u>(\$ Millions)</u>	<u>Employment</u> <u>(Thousands)</u>	<u>State Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>	<u>Local Tax</u> <u>Receipts</u> <u>(\$ Millions)</u>
MID-CUMBERLAND REGION					
CHEATHAM	\$13.53	\$2.66	0.13	\$0.79	\$0.46
DAVIDSON	3,215.90	1,551.76	56.39	158.11	82.14
DICKSON	39.64	7.76	0.48	2.39	0.97
HOUSTON	4.31	0.76	0.04	0.25	0.47
HUMPHREYS	24.20	5.09	0.26	1.31	1.59
MONTGOMERY	118.18	22.29	1.24	7.51	2.26
ROBERTSON	25.52	4.08	0.21	1.68	0.69
RUTHERFORD	177.08	32.72	1.87	10.94	3.80
STEWART	5.78	0.86	0.03	0.34	0.86
SUMNER	72.72	13.54	0.75	4.52	1.67
TROUSDALE	2.60	0.33	0.02	0.16	0.09
WILLIAMSON	195.10	36.82	2.05	11.76	4.00
WILSON	79.08	15.96	0.83	4.79	2.34
Total	\$3,973.65	\$1,694.63	64.29	\$204.55	\$101.34
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	\$20.77	\$4.05	0.21	\$1.24	\$0.81
COFFEE	53.69	10.66	0.60	3.23	1.41
FRANKLIN	15.10	2.55	0.12	0.95	0.71
GILES	17.05	2.78	0.15	1.07	0.74
HICKMAN	5.55	0.92	0.04	0.33	0.53
LAWRENCE	28.49	4.74	0.23	1.81	0.78
LEWIS	4.36	0.78	0.05	0.26	0.21
LINCOLN	15.17	2.41	0.13	0.97	0.48
MARSHALL	17.81	3.41	0.17	1.12	0.47
MAURY	72.63	11.61	0.63	4.49	1.52
MOORE	1.07	0.18	0.01	0.06	0.06
PERRY	4.91	0.78	0.02	0.26	1.29
WAYNE	8.20	1.59	0.07	0.48	0.52
Total	\$264.80	\$46.45	2.42	\$16.27	\$9.53

Table F: Alphabetical by Region, 2004

2004 Impact of U.S. Resident Travel on Tennessee					
Table F: Alphabetical by Region, 2004 (Continued)					
<u>Region/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>
NORTHWEST TENNESSEE REGION					
BENTON	\$17.56	\$3.18	0.15	\$1.10	\$1.87
CARROLL	13.10	2.03	0.11	0.80	0.50
CROCKETT	5.83	1.04	0.06	0.34	0.26
DYER	30.10	5.69	0.34	1.88	0.71
GIBSON	25.84	3.46	0.18	1.71	0.77
HENRY	39.92	7.52	0.31	2.35	5.11
LAKE	8.13	1.92	0.11	0.46	0.61
OBION	34.91	6.59	0.35	2.12	1.05
WEAKLEY	13.63	2.18	0.11	0.84	0.46
<i>Total</i>	<i>\$189.02</i>	<i>\$33.61</i>	<i>1.71</i>	<i>\$11.58</i>	<i>\$11.34</i>
SOUTHWEST TENNESSEE REGION					
CHESTER	\$6.73	\$0.78	0.03	\$0.46	\$0.21
DECATUR	8.53	1.28	0.04	0.52	1.51
HARDEMAN	17.56	2.80	0.14	1.09	1.00
HARDIN	25.23	4.69	0.19	1.54	2.15
HAYWOOD	10.65	1.71	0.08	0.67	0.47
HENDERSON	15.97	2.56	0.14	1.00	0.51
MCNAIRY	7.40	1.18	0.05	0.44	0.41
MADISON	129.40	27.52	1.60	7.75	2.79
<i>Total</i>	<i>\$221.47</i>	<i>\$42.50</i>	<i>2.28</i>	<i>\$13.47</i>	<i>\$9.06</i>
MEMPHIS DELTA REGION					
FAYETTE	\$5.13	\$0.72	0.03	\$0.31	\$0.28
LAUDERDALE	12.40	1.84	0.09	0.74	0.99
SHELBY	2,455.99	1,770.02	49.33	108.38	68.85
TIPTON	19.08	2.92	0.15	1.22	0.62
<i>Total</i>	<i>\$2,492.61</i>	<i>\$1,775.49</i>	<i>49.60</i>	<i>\$110.65</i>	<i>\$70.74</i>
STATE TOTALS	\$11,163.51	\$4,649.95	\$171.47	\$585.97	\$330.84

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Table G: Change in Travel Spending from 2003 by Region

2004 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2003 by Region			
<u>Region/County</u>	<u>2004 Travel Expenditures (\$ Millions)</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>Change 2004/2003 (Percent)</u>
NORTHEAST TENNESSEE REGION			
CARTER	\$22.94	\$21.68	5.8%
GREENE	58.81	54.58	7.7%
HANCOCK	0.94	0.90	4.9%
HAWKINS	24.78	23.13	7.1%
JOHNSON	7.71	7.53	2.4%
SULLIVAN	219.03	208.72	4.9%
UNICOI	6.17	6.18	-0.2%
WASHINGTON	157.43	148.00	6.4%
Total	\$497.81	\$470.72	5.8%
EAST TENNESSEE REGION			
ANDERSON	\$79.43	\$71.63	10.9%
BLOUNT	210.07	193.82	8.4%
CAMPBELL	39.70	39.11	1.5%
CLAIBORNE	12.14	11.69	3.8%
COCKE	30.57	29.82	2.5%
GRAINGER	11.43	11.13	2.7%
HAMBLEN	62.61	58.25	7.5%
JEFFERSON	34.19	33.08	3.4%
KNOX	637.09	599.01	6.4%
LOUDON	29.98	28.00	7.1%
MONROE	29.77	28.71	3.7%
MORGAN	3.43	3.27	4.8%
ROANE	44.89	42.31	6.1%
SCOTT	8.91	8.60	3.6%
SEVIER	1,206.31	1,133.54	6.4%
UNION	5.08	4.93	3.0%
Total	\$2,445.60	\$2,296.90	6.5%

Table G: Change in Travel Spending from 2003 by Region

2004 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2003 by Region (Continued)			
<u>Region/County</u>	<u>2004 Travel Expenditures (\$ Millions)</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>Change 2004/2003 (Percent)</u>
UPPER CUMBERLAND REGION			
CANNON	\$3.01	\$2.87	4.8%
CLAY	5.71	5.59	2.1%
CUMBERLAND	81.34	75.35	7.9%
DEKALB	27.78	27.17	2.2%
FENTRESS	9.62	9.22	4.3%
JACKSON	1.80	1.74	3.1%
MACON	5.11	4.88	4.7%
OVERTON	6.00	5.62	6.7%
PICKETT	5.74	5.64	1.8%
PUTNAM	78.33	72.73	7.7%
SMITH	7.53	7.34	2.6%
VAN BUREN	7.14	6.92	3.1%
WARREN	20.78	19.67	5.6%
WHITE	13.33	12.47	6.9%
Total	\$273.21	\$257.22	6.2%
SOUTHEAST TENNESSEE REGION			
BLEDSON	\$2.73	\$2.67	2.2%
BRADLEY	90.17	85.95	4.9%
GRUNDY	6.06	5.77	4.9%
HAMILTON	601.31	562.80	6.8%
MCMINN	29.79	28.15	5.8%
MARION	23.63	22.11	6.9%
MEIGS	5.83	5.72	1.9%
POLK	16.89	16.54	2.2%
RHEA	23.95	23.95	0.0%
SEQUATCHIE	4.99	4.86	2.8%
Total	\$805.35	\$758.53	6.2%

Table G: Change in Travel Spending from 2003 by Region

2004 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2003 by Region (Continued)			
<u>Region/County</u>	<u>2004 Travel Expenditures (\$ Millions)</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>Change 2004/2003 (Percent)</u>
MID-CUMBERLAND REGION			
CHEATHAM	\$13.53	\$12.79	5.8%
DAVIDSON	3,215.90	3,040.64	5.8%
DICKSON	39.64	38.25	3.6%
HOUSTON	4.31	4.19	2.9%
HUMPHREYS	24.20	22.22	8.9%
MONTGOMERY	118.18	110.30	7.1%
ROBERTSON	25.52	23.63	8.0%
RUTHERFORD	177.08	164.79	7.5%
STEWART	5.78	5.56	3.9%
SUMNER	72.72	67.75	7.3%
TROUSDALE	2.60	2.49	4.4%
WILLIAMSON	195.10	180.61	8.0%
WILSON	79.08	72.99	8.3%
Total	\$3,973.65	\$3,746.21	6.1%
SOUTH CENTRAL TENNESSEE REGION			
BEDFORD	\$20.77	\$19.63	5.8%
COFFEE	53.69	50.27	6.8%
FRANKLIN	15.10	14.48	4.3%
GILES	17.05	15.79	8.0%
HICKMAN	5.55	5.39	2.9%
LAWRENCE	28.49	26.67	6.9%
LEWIS	4.36	4.29	1.6%
LINCOLN	15.17	14.42	5.2%
MARSHALL	17.81	17.14	3.9%
MAURY	72.63	70.04	3.7%
MOORE	1.07	1.04	2.6%
PERRY	4.91	4.79	2.4%
WAYNE	8.20	7.90	3.8%
Total	\$264.80	\$251.85	5.1%

Table G: Change in Travel Spending from 2003 by Region

2004 Impact of Travel on Tennessee			
Table G: Change in Travel Spending from 2003 by Region (Continued)			
<u>Region/County</u>	<u>2004 Travel Expenditures (\$ Millions)</u>	<u>2003 Travel Expenditures (\$ Millions)</u>	<u>Change 2004/2003 (Percent)</u>
NORTHWEST TENNESSEE REGION			
BENTON	\$17.56	\$17.20	2.1%
CARROLL	13.10	12.43	5.3%
CROCKETT	5.83	5.62	3.8%
DYER	30.10	28.41	5.9%
GIBSON	25.84	24.50	5.5%
HENRY	39.92	37.42	6.7%
LAKE	8.13	7.96	2.2%
OBION	34.91	32.67	6.8%
WEAKLEY	13.63	12.85	6.1%
Total	\$189.02	\$179.06	5.6%
SOUTHWEST TENNESSEE REGION			
CHESTER	\$6.73	\$6.23	8.1%
DECATUR	\$8.53	\$8.13	4.9%
HARDEMAN	17.56	17.13	2.5%
HARDIN	25.23	24.94	1.2%
HAYWOOD	10.65	10.11	5.4%
HENDERSON	15.97	15.25	4.7%
MCNAIRY	7.40	7.10	4.3%
MADISON	129.40	125.25	3.3%
Total	\$221.47	\$214.14	3.4%
MEMPHIS DELTA REGION			
FAYETTE	\$5.13	\$4.93	4.1%
LAUDERDALE	12.40	12.04	3.1%
SHELBY	2,455.99	2,370.26	3.6%
TIPTON	19.08	17.93	6.4%
Total	\$2,492.61	\$2,405.16	3.6%
STATE TOTALS	\$11,163.51	\$10,579.80	5.5%

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Table H: Percent Change Over 2003 by Region

2004 Impact of Travel on Tennessee					
Table H: Percent Change Over 2003 by Region					
<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHEAST TENNESSEE REGION					
CARTER	5.8%	2.0%	-0.6%	3.6%	4.4%
GREENE	7.7%	3.8%	1.3%	5.5%	6.3%
HANCOCK	4.9%	1.1%	-1.5%	2.7%	3.5%
HAWKINS	7.1%	3.3%	0.7%	4.9%	5.7%
JOHNSON	2.4%	-1.3%	-3.8%	0.2%	1.0%
SULLIVAN	4.9%	1.2%	-1.4%	2.8%	3.5%
UNICOI	-0.2%	-3.8%	-6.2%	-2.3%	-1.5%
WASHINGTON	6.4%	2.5%	0.0%	4.2%	5.0%
Total	5.8%	1.7%	-0.7%	3.6%	4.2%
EAST TENNESSEE REGION					
ANDERSON	10.9%	6.9%	4.2%	8.6%	9.4%
BLOUNT	8.4%	4.5%	1.9%	6.1%	6.9%
CAMPBELL	1.5%	-2.2%	-4.6%	-0.6%	0.2%
CLAIBORNE	3.8%	0.1%	-2.4%	1.7%	2.5%
COCKE	2.5%	-1.2%	-3.6%	0.4%	1.2%
GRAINGER	2.7%	-1.0%	-3.5%	0.6%	1.3%
HAMBLÉN	7.5%	3.6%	1.0%	5.3%	6.1%
JEFFERSON	3.4%	-0.4%	-2.9%	1.2%	2.0%
KNOX	6.4%	2.5%	0.0%	4.1%	4.9%
LOUDON	7.1%	3.2%	0.6%	4.8%	5.6%
MONROE	3.7%	-0.1%	-2.6%	1.5%	2.3%
MORGAN	4.8%	1.0%	-1.5%	2.6%	3.4%
ROANE	6.1%	2.3%	-0.3%	3.9%	4.7%
SCOTT	3.6%	-0.2%	-2.6%	1.4%	2.2%
SEVIER	6.4%	2.6%	0.0%	4.2%	5.0%
UNION	3.0%	-0.7%	-3.2%	0.9%	1.6%
Total	6.5%	2.7%	0.1%	4.3%	4.7%

Table H: Percent Change Over 2003 by Region

2004 Impact of Travel on Tennessee**Table H: Percent Change Over 2003 by Region (Continued)**

<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
UPPER CUMBERLAND REGION					
CANNON	4.8%	1.0%	-1.5%	2.6%	3.4%
CLAY	2.1%	-1.5%	-4.0%	0.0%	0.8%
CUMBERLAND	7.9%	4.1%	1.5%	5.7%	6.5%
DEKALB	2.2%	-1.5%	-3.9%	0.1%	0.9%
FENTRESS	4.3%	0.5%	-2.0%	2.1%	2.9%
JACKSON	3.1%	-0.6%	-3.1%	1.0%	1.8%
MACON	4.7%	0.9%	-1.6%	2.5%	3.3%
OVERTON	6.7%	2.9%	0.3%	4.5%	5.3%
PICKETT	1.8%	-1.9%	-4.3%	-0.3%	0.4%
PUTNAM	7.7%	3.8%	1.2%	5.5%	6.3%
SMITH	2.6%	-1.1%	-3.6%	0.4%	1.2%
VAN BUREN	3.1%	-0.6%	-3.1%	1.0%	1.8%
WARREN	5.6%	1.8%	-0.7%	3.4%	4.2%
WHITE	6.9%	3.1%	0.5%	4.7%	5.5%
Total	6.2%	2.4%	0.0%	4.0%	3.5%
SOUTHEAST TENNESSEE REGION					
BLED SOE	2.2%	-1.5%	-3.9%	0.1%	0.9%
BRADLEY	4.9%	1.1%	-1.4%	2.7%	3.5%
GRUNDY	4.9%	1.1%	-1.4%	2.7%	3.5%
HAMILTON	6.8%	3.0%	0.4%	4.6%	5.4%
MCMINN	5.8%	2.0%	-0.5%	3.6%	4.4%
MARION	6.9%	3.0%	0.4%	4.6%	5.4%
MEIGS	1.9%	-1.8%	-4.2%	-0.2%	0.6%
POLK	2.2%	-1.5%	-4.0%	0.0%	0.8%
RHEA	0.0%	-3.6%	-6.0%	-2.1%	-1.3%
SEQUATCHIE	2.8%	-0.9%	-3.4%	0.6%	1.4%
Total	6.2%	2.4%	-0.1%	3.9%	4.0%

Table H: Percent Change Over 2003 by Region

2004 Impact of Travel on Tennessee					
Table H: Percent Change Over 2003 by Region (Continued)					
<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
MID-CUMBERLAND REGION					
CHEATHAM	5.8%	2.0%	-0.6%	3.6%	4.4%
DAVIDSON	5.8%	1.9%	-0.6%	3.6%	4.4%
DICKSON	3.6%	-0.1%	-2.6%	1.5%	2.2%
HOUSTON	2.9%	-0.8%	-3.3%	0.7%	1.5%
HUMPHREYS	8.9%	5.0%	2.4%	6.6%	7.5%
MONTGOMERY	7.1%	3.3%	0.7%	4.9%	5.7%
ROBERTSON	8.0%	4.1%	1.5%	5.8%	6.6%
RUTHERFORD	7.5%	3.6%	1.0%	5.2%	6.0%
STEWART	3.9%	0.2%	-2.3%	1.7%	2.5%
SUMNER	7.3%	3.5%	0.9%	5.1%	5.9%
TROUSDALE	4.4%	0.6%	-1.9%	2.2%	3.0%
WILLIAMSON	8.0%	4.1%	1.5%	5.8%	6.6%
WILSON	8.3%	4.4%	1.8%	6.1%	6.9%
Total	6.1%	2.1%	-0.4%	3.9%	4.6%
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	5.8%	2.0%	-0.5%	3.6%	4.4%
COFFEE	6.8%	2.9%	0.4%	4.6%	5.4%
FRANKLIN	4.3%	0.5%	-2.0%	2.1%	2.9%
GILES	8.0%	4.1%	1.5%	5.7%	6.6%
HICKMAN	2.9%	-0.8%	-3.2%	0.8%	1.6%
LAWRENCE	6.9%	3.0%	0.4%	4.6%	5.4%
LEWIS	1.6%	-2.1%	-4.5%	-0.6%	0.2%
LINCOLN	5.2%	1.4%	-1.2%	3.0%	3.8%
MARSHALL	3.9%	0.1%	-2.4%	1.7%	2.5%
MAURY	3.7%	0.0%	-2.5%	1.5%	2.3%
MOORE	2.6%	-1.1%	-3.6%	0.5%	1.2%
PERRY	2.4%	-1.3%	-3.7%	0.3%	1.1%
WAYNE	3.8%	0.1%	-2.4%	1.7%	2.4%
Total	5.1%	1.4%	-1.1%	3.0%	3.4%

Table H: Percent Change Over 2003 by Region

2004 Impact of Travel on Tennessee**Table H: Percent Change Over 2003 by Region (Continued)**

<u>Region/County</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHWEST TENNESSEE REGION					
BENTON	2.1%	-1.6%	-4.1%	-0.1%	0.7%
CARROLL	5.3%	1.5%	-1.0%	3.1%	3.9%
CROCKETT	3.8%	0.0%	-2.5%	1.6%	2.4%
DYER	5.9%	2.1%	-0.4%	3.7%	4.5%
GIBSON	5.5%	1.7%	-0.9%	3.3%	4.1%
HENRY	6.7%	2.8%	0.3%	4.5%	5.3%
LAKE	2.2%	-1.5%	-3.9%	0.1%	0.8%
OBION	6.8%	3.0%	0.4%	4.6%	5.4%
WEAKLEY	6.1%	2.3%	-0.3%	3.9%	4.7%
Total	5.6%	1.7%	-0.8%	3.4%	4.0%
SOUTHWEST TENNESSEE REGION					
CHESTER	8.1%	4.2%	1.6%	5.8%	6.7%
DECATUR	4.9%	1.1%	-1.4%	2.7%	3.5%
HARDEMAN	2.5%	-1.2%	-3.7%	0.4%	1.1%
HARDIN	1.2%	-2.5%	-4.9%	-0.9%	-0.2%
HAYWOOD	5.4%	1.6%	-0.9%	3.2%	4.0%
HENDERSON	4.7%	0.9%	-1.6%	2.5%	3.3%
MCNAIRY	4.3%	0.5%	-2.0%	2.1%	2.9%
MADISON	3.3%	-0.4%	-2.9%	1.2%	1.9%
Total	3.4%	-0.4%	-2.9%	1.3%	1.9%
MEMPHIS DELTA REGION					
FAYETTE	4.1%	0.3%	-2.1%	1.9%	2.7%
LAUDERDALE	3.1%	-0.7%	-3.1%	0.9%	1.7%
SHELBY	3.6%	-0.1%	-2.6%	1.5%	2.2%
TIPTON	6.4%	2.5%	0.0%	4.2%	5.0%
Total	3.6%	-0.1%	-2.6%	1.5%	2.3%
STATE TOTALS	5.5%	1.3%	-1.0%	3.4%	3.9%

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Table I: Alphabetical by Region, 2003

2004 Impact of U.S. Resident Travel on Tennessee					
Table I: Alphabetical by Region, 2003					
	Expenditures	Payroll	Employment	State Tax	Local Tax
	<u>(\$ Millions)</u>	<u>(\$ Millions)</u>	<u>(Thousands)</u>	<u>Receipts (\$ Millions)</u>	<u>Receipts (\$ Millions)</u>
NORTHEAST TENNESSEE REGION					
CARTER	\$21.68	\$3.48	0.16	\$1.39	\$1.38
GREENE	54.58	10.36	0.54	3.44	1.48
HANCOCK	0.90	0.12	0.01	0.05	0.19
HAWKINS	23.13	4.13	0.22	1.38	1.29
JOHNSON	7.53	1.51	0.07	0.45	0.59
SULLIVAN	208.72	67.27	2.80	12.02	5.80
UNICOI	6.18	1.54	0.08	0.36	0.51
WASHINGTON	148.00	30.37	1.72	9.11	3.49
Total	\$470.72	\$118.79	5.59	\$28.21	\$14.73
EAST TENNESSEE REGION					
ANDERSON	\$71.63	\$14.06	0.84	\$4.55	\$1.56
BLOUNT	193.82	60.14	2.63	11.21	6.75
CAMPBELL	39.11	8.04	0.47	2.33	2.06
CLAIBORNE	11.69	2.31	0.13	0.70	0.89
COCKE	29.82	6.58	0.42	1.79	1.34
GRAINGER	11.13	2.02	0.08	0.65	2.18
HAMBLLEN	58.25	10.54	0.58	3.80	1.30
JEFFERSON	33.08	6.83	0.35	2.05	2.45
KNOX	599.01	229.68	8.97	33.00	14.57
LOUDON	28.00	5.37	0.31	1.77	0.72
MONROE	28.71	5.80	0.31	1.73	1.97
MORGAN	3.27	0.42	0.01	0.21	0.42
ROANE	42.31	7.76	0.44	2.64	2.23
SCOTT	8.60	1.53	0.09	0.49	0.52
SEVIER	1,133.54	312.80	17.71	63.77	33.49
UNION	4.93	0.92	0.03	0.29	0.74
Total	\$2,296.90	\$674.79	33.36	\$130.97	\$73.20

Table I: Alphabetical by Region, 2003

2004 Impact of U.S. Resident Travel on Tennessee
Table I: Alphabetical by Region, 2003 (Continued)

	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
UPPER CUMBERLAND REGION					
CANNON	\$2.87	\$0.33	0.01	\$0.19	\$0.20
CLAY	5.59	1.43	0.06	0.32	0.50
CUMBERLAND	75.35	18.84	1.00	4.45	3.20
DEKALB	27.17	6.22	0.27	1.60	3.62
FENTRESS	9.22	1.68	0.09	0.56	0.63
JACKSON	1.74	0.28	0.01	0.11	0.22
MACON	4.88	0.85	0.05	0.29	0.26
OVERTON	5.62	0.92	0.04	0.36	0.36
PICKETT	5.64	1.41	0.06	0.33	0.84
PUTNAM	72.73	13.61	0.82	4.53	1.50
SMITH	7.34	1.11	0.05	0.47	0.33
VAN BUREN	6.92	1.82	0.07	0.40	0.74
WARREN	19.67	3.57	0.18	1.22	0.80
WHITE	12.47	1.60	0.07	0.83	0.60
Total	\$257.22	\$53.66	2.78	\$15.66	\$13.79
SOUTHEAST TENNESSEE REGION					
BLEDSON	\$2.67	\$0.45	0.02	\$0.16	\$0.43
BRADLEY	85.95	16.53	1.00	5.46	1.85
GRUNDY	5.77	0.81	0.02	0.37	1.04
HAMILTON	562.80	145.93	7.35	33.45	12.58
MCMINN	28.15	4.85	0.28	1.76	0.71
MARION	22.11	4.27	0.25	1.36	0.82
MEIGS	5.72	1.16	0.04	0.33	0.76
POLK	16.54	4.56	0.20	0.96	1.55
RHEA	23.95	4.90	0.26	1.45	1.62
SEQUATCHIE	4.86	0.83	0.03	0.30	0.36
Total	\$758.53	\$184.28	9.45	\$45.59	\$21.71

Table I: Alphabetical by Region, 2003

2004 Impact of U.S. Resident Travel on Tennessee
Table I: Alphabetical by Region, 2003 (Continued)

	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
MID-CUMBERLAND REGION					
CHEATHAM	\$12.79	\$2.61	0.13	\$0.76	\$0.44
DAVIDSON	3,040.64	1,522.18	56.72	152.68	78.71
DICKSON	38.25	7.77	0.49	2.36	0.95
HOUSTON	4.19	0.77	0.04	0.25	0.46
HUMPHREYS	22.22	4.85	0.25	1.22	1.48
MONTGOMERY	110.30	21.58	1.23	7.16	2.14
ROBERTSON	23.63	3.92	0.21	1.59	0.64
RUTHERFORD	164.79	31.59	1.85	10.40	3.58
STEWART	5.56	0.86	0.03	0.34	0.84
SUMNER	67.75	13.09	0.74	4.30	1.57
TROUSDALE	2.49	0.33	0.02	0.15	0.08
WILLIAMSON	180.61	35.36	2.01	11.12	3.76
WILSON	72.99	15.28	0.82	4.52	2.19
Total	\$3,746.21	\$1,660.18	64.55	\$196.84	\$96.85
SOUTH CENTRAL TENNESSEE REGION					
BEDFORD	\$19.63	\$3.97	0.21	\$1.19	\$0.78
COFFEE	50.27	10.35	0.60	3.09	1.34
FRANKLIN	14.48	2.53	0.13	0.93	0.69
GILES	15.79	2.67	0.15	1.02	0.69
HICKMAN	5.39	0.92	0.04	0.32	0.53
LAWRENCE	26.67	4.61	0.23	1.73	0.74
LEWIS	4.29	0.79	0.05	0.26	0.21
LINCOLN	14.42	2.38	0.13	0.94	0.47
MARSHALL	17.14	3.40	0.17	1.10	0.46
MAURY	70.04	11.62	0.65	4.42	1.48
MOORE	1.04	0.18	0.01	0.06	0.06
PERRY	4.79	0.79	0.02	0.26	1.27
WAYNE	7.90	1.59	0.08	0.48	0.51
Total	\$251.85	\$45.81	2.45	\$15.80	\$9.22

Table I: Alphabetical by Region, 2003

2004 Impact of U.S. Resident Travel on Tennessee					
Table I: Alphabetical by Region, 2003 (Continued)					
	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (Thousands)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)
NORTHWEST TENNESSEE REGION					
BENTON	\$17.20	\$3.23	0.15	\$1.10	\$1.86
CARROLL	12.43	2.00	0.11	0.77	0.48
CROCKETT	5.62	1.04	0.06	0.33	0.25
DYER	28.41	5.58	0.34	1.81	0.68
GIBSON	24.50	3.40	0.18	1.65	0.74
HENRY	37.42	7.32	0.31	2.25	4.85
LAKE	7.96	1.94	0.12	0.46	0.60
OBION	32.67	6.40	0.35	2.03	1.00
WEAKLEY	12.85	2.13	0.11	0.81	0.44
Total	\$179.06	\$33.04	1.73	\$11.21	\$10.90
SOUTHWEST TENNESSEE REGION					
CHESTER	\$6.23	\$0.75	0.03	\$0.43	\$0.20
DECATUR	8.13	1.26	0.04	0.51	1.46
HARDEMAN	17.13	2.84	0.15	1.08	0.99
HARDIN	24.94	4.80	0.20	1.56	2.16
HAYWOOD	10.11	1.68	0.09	0.65	0.45
HENDERSON	15.25	2.54	0.14	0.98	0.49
MCNAIRY	7.10	1.17	0.05	0.43	0.40
MADISON	125.25	27.63	1.65	7.66	2.73
Total	\$214.14	\$42.67	2.35	\$13.30	\$8.89
MEMPHIS DELTA REGION					
FAYETTE	\$4.93	\$0.71	0.03	\$0.30	\$0.27
LAUDERDALE	12.04	1.85	0.09	0.73	0.98
SHELBY	2,370.26	1,772.25	50.65	106.82	67.34
TIPTON	17.93	2.84	0.15	1.17	0.59
Total	\$2,405.16	\$1,777.66	50.92	\$109.03	\$69.18
STATE TOTALS	\$10,579.80	\$4,590.88	\$173.19	\$566.62	\$318.48

C2005 TIA

Table J: Region Total, 2004

2004 Impact of U.S. Resident Travel on Tennessee					
Table J: Region Total, 2004					
<u>Region</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>
NORTHEAST	\$497.81	\$120.86	5.56	\$29.22	\$15.34
EAST	2,445.60	692.71	33.39	136.55	76.64
UPPER CUMBERLAND	273.21	54.94	2.78	16.29	14.27
SOUTHEAST	805.35	188.77	9.44	47.39	22.57
MID-CUMBERLAND	3,973.65	1,694.63	64.29	204.55	101.34
SOUTH CENTRAL	264.80	46.45	2.42	16.27	9.53
NORTHWEST	189.02	33.61	1.71	11.58	11.34
SOUTHWEST	221.47	42.50	2.28	13.47	9.06
<u>MEMPHIS DELTA</u>	2,492.61	1,775.49	49.60	110.65	70.74
STATE TOTALS	\$11,163.51	\$4,649.95	171.47	\$585.97	\$330.84

C2005 TIA

Table K: Region Total, 2003

2004 Impact of U.S. Resident Travel on Tennessee					
Table K: Region Total, 2003					
<u>Region</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>
NORTHEAST	\$470.72	\$118.79	5.59	\$28.21	\$14.73
EAST	2,296.90	674.79	33.36	130.97	73.20
UPPER CUMBERLAND	257.22	53.66	2.78	15.66	13.79
SOUTHEAST	758.53	184.28	9.45	45.59	21.71
MID-CUMBERLAND	3,746.21	1,660.18	64.55	196.84	96.85
SOUTH CENTRAL	251.85	45.81	2.45	15.80	9.22
NORTHWEST	179.06	33.04	1.73	11.21	10.90
SOUTHWEST	214.14	42.67	2.35	13.30	8.89
<u>MEMPHIS DELTA</u>	2,405.16	1,777.66	50.92	109.03	69.18
STATE TOTALS	\$10,579.80	\$4,590.88	173.19	\$566.62	\$318.48

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Table L: Percent Change Over 2003 by Region Total

2004 Impact of Travel on Tennessee					
Table L: Percent Change Over 2003 by Region Total					
<u>Region</u>	<u>Expenditures</u>	<u>Payroll</u>	<u>Employment</u>	<u>State Tax Receipts</u>	<u>Local Tax Receipts</u>
NORTHEAST	5.8%	1.7%	-0.7%	3.6%	4.2%
EAST	6.5%	2.7%	0.1%	4.3%	4.7%
UPPER CUMBERLAND	6.2%	2.4%	0.0%	4.0%	3.5%
SOUTHEAST	6.2%	2.4%	-0.1%	3.9%	4.0%
MID-CUMBERLAND	6.1%	2.1%	-0.4%	3.9%	4.6%
SOUTH CENTRAL	5.1%	1.4%	-1.1%	3.0%	3.4%
NORTHWEST	5.6%	1.7%	-0.8%	3.4%	4.0%
SOUTHWEST	3.4%	-0.4%	-2.9%	1.3%	1.9%
<u>MEMPHIS DELTA</u>	3.6%	-0.1%	-2.6%	1.5%	2.3%
STATE TOTALS	5.5%	1.3%	-1.0%	3.4%	3.9%

C2005 TIA

APPENDICES

Appendix A: Revised TravelScope® Data

U.S. Resident Travel Volumes, 1994-2004 (Millions)				
<u>Year</u>	<u>Person-Trips</u>	<u>Leisure</u>	<u>Business/ Convention</u>	<u>Combined Business/Leisure</u>
1994	1,038.7	800.9	162.8	75.0
1995	1,065.6	820.0	167.1	78.5
1996	1,067.4	828.8	162.8	75.8
1997	1,101.8	862.8	160.7	78.3
1998	1,108.0	862.6	165.5	79.9
1999	1,089.5	848.6	164.3	76.6
2000	1,100.8	865.7	161.5	73.6
2001	1,123.1	895.5	153.1	74.5
2002	1,127.0	912.3	142.4	72.3
2003	1,140.0	929.5	138.2	72.3
2004	1,163.9	942.5	145.1	76.3

Travelers To And Through Tennessee, 1997-2004 (Thousands) *			
<u>Year</u>	<u>Total</u>	<u>Overnight</u>	<u>Day Trip</u>
1997	43,083	25,339	17,744
1998	41,273	24,704	16,569
1999	40,612	24,684	15,928
2000	38,504	22,754	15,749
2001	41,027	25,023	16,005
2002	42,041	25,115	16,926
2003	42,754	25,814	16,939
2004	43,644	27,273	16,371

Source: TIA

* Reflects person trips.

Appendix B: Travel Economic Impact Model

Introduction

The Travel Economic Impact Model (TEIM) was developed by the research department at TIA (formerly known as the U.S. Travel Data Center) to provide annual estimates of the impact of the travel activity of U.S. residents on national, state and county economies in this country. It is a disaggregated model comprised of 16 travel categories. The TEIM estimates travel expenditures and the resulting business receipts, employment, personal income, and tax receipts generated by these expenditures.

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

Definition of Terms

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

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

A *travel expenditure* is assumed to take place whenever a traveler exchanges money for an activity considered part of his/her trip. Total travel expenditures are separated into 16 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 enroute.

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

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

Description of the Model

Estimates of Travel Expenditures

Total travel expenditures includes spending by travelers on goods and services during their trips, such as lodging, transportation, meals, entertainment, retail shopping. Sixteen (16) categories of activities are covered in the TEIM. Generally, the TEIM combines the activity levels for trips to places within the United States with the appropriate average costs of each unit of travel activity, (e.g., cost per mile by mode of transport, cost per night by type of accommodation), to produce estimates of the total amount spent on each of 16 categories of travel-related goods and services by state. For example, the number of nights spent by travel parties in hotels in Vermont is multiplied by the average cost per night per travel party of staying in a hotel in the state to obtain the estimate of traveler expenditures for hotel accommodations.

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

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

Estimates of Business Receipts, Payroll and Employment

The Economic Impact Component of the TEIM estimates travel generated business receipts, employment, and payroll. Basically, the 16 travel categories are associated with a type of travel-related business. For example, traveler spending on commercial lodging in a state is

related to the business receipts, employment and payroll of hotels, motels and motor hotels (SIC 701; NAICS 7211) in the state. It is assumed that travel spending in each category, less sales and excise taxes, equals business receipts for the related business type as defined by the U.S. Census Bureau.

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

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

Estimates of Tax Revenues

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

Estimates for Counties and Local Areas

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

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

Limitations of the Study

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

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

Appendix C: Glossary of Terms

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

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

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

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

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

Public Transportation Expenditures. This includes traveler spending on air, bus, rail and boat/ship transportation, and taxicab or limousine service between airports and central cities. Also included are expenditures on "other transportation" as indicated in the TravelScope.

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

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

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

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

Appendix D: Travel-Related Industry Measurement

SIC-NAICS TRANSITION

As described in Appendix A, the 16 types of travel categories used in TEIM are associated with types of travel-related businesses. For many years, TIA selected these business types using 1987 U.S. Standard Industrial Classification (SIC) system codes.

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

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

In 1998, the United States Office of Management and Budget published a new industry classification system – the 1997 (and 2002 update) North American Industry Classification System (NAICS) to replace the SIC system. In contrast, the 2- to 6-digit NAICS industry classification system includes more useful and detailed economic data and provides a more comprehensive statistical representation of our industry. NAICS offers four major advantages over the SIC system:

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

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

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

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

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

TEIM: SIC/NAICS INDUSTRY CATEGORIES

With the transition to NAICS, TIA has adjusted its selections of the travel-related business types using the new NAICS codes and brought its travel economic research into conformity with NAICS. For measurement purposes, TIA's Travel Economic Impact Model tracks business activity in seven (7) major travel-related industry groups. These, in turn, are comprised of sixteen (16) business subcategories.

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

1. Automobile Transportation Industry: Gasoline service stations, motor vehicle/parts dealers and passenger car rental.
2. Entertainment/Recreation Industry: Entertainment, art, and recreation industry.
3. Foodservice Industry: Eating & drinking places, and grocery stores.
4. General Retail Trade Industry: General merchandise group stores and miscellaneous retail stores, including gift and souvenir shops.

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

5. Lodging Industry: This industry includes hotels, motels, and motor hotels, camps and trailer parks.
6. Public Transportation Industry: Air transportation, taxicab companies, interurban & rural bus transportation, railroad passenger transportation (Amtrak) and water passenger transportation. Also is the "dummy" industry of "other transportation."
7. Travel Arrangement Industry: This includes travel agencies, tour operators, and other travel arrangement & reservation services.

1987 SIC – 1997 NAICS:
Selected Travel-Related Categories

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

Appendix E: Sources of Data

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

Organizations

Air Transport Association
American Automobile Association
Amtrak
American Society of Travel Agents
Bureau of Census, U.S. Department of Commerce
Bureau of Economic Analysis, U.S. Department of Commerce
Bureau of Labor Statistics, U.S. Department of Labor
Federal Aviation Administration, U.S. Department of Transportation
Federal Highway Administration, U.S. Department of Transportation
National Park Service
Tennessee Department of Tourist Development
Tennessee Department of Labor & Workforce Development
Tennessee Department of Revenue
Peterson, Howell & Heather, Inc.
Runzheimer International Ltd.
Smith Travel Research
Office of Travel and Tourism Industries (OTTI)/ITA, U.S. Department of Commerce

Appendix F: RIMS II

REGIONAL INPUT-OUTPUT MODELING SYSTEM

A BRIEF DESCRIPTION

Regional Economic Analysis Division
Bureau of Economic Analysis
U.S. Department of Commerce
Washington, D.C. 20230
(202) 523-0594

RIMS II

Many types of public sector and private sector decisions require an evaluation of probable regional effects. For example, Federal requirements for environmental impact statements and the urban impact of Federal policies necessitate regional impact analyses. A growing concern, therefore, about the effects of public and private decisions has created a demand for regional economic models.

As a result of this demand, economic impact models have been developed for many States and regions. These models vary considerably in terms of structure, reliability, sectoral and geographical detail, flexibility in application, and cost of development and use. In general, the models that provide the most reliable and industrially-detailed secondary impact estimates are the most expensive to construct, while the less costly models that can be used in numerous small-area studies often provide less accurate estimates.

In response to the growing need for improved techniques for regional impact analysis, the Regional Economic Analysis Division of the Bureau of Economic Analysis (BEA) developed the Regional Industrial Multiplier System (RIMS) in the mid-1970's. RIMS was designed to estimate input-output type multipliers for use in estimating the secondary regional impacts of public and private economic development policies. RIMS was capable of estimating multipliers for any region composed of one or more contiguous counties and for any of the 478 industrial sectors in the 1967 BEA national input-output (I-O) table. A significant improvement over the more summary measures often used in regional impact analysis, RIMS was capable of providing reliable multiplier estimates without the high cost of gathering survey data.

The Regional Input-Output Modeling System (RIMS II) is a major revision of RIMS. The basic differences between RIMS II and RIMS are the use of more recent national I-O tables (1972 and 1977), the use of more detailed and more current data for regionalizing the national I-O tables, and greater flexibility in the derivation of regional impact estimates through the use of a matrix inversion technique that provides industrially-disaggregated impacts. RIMS II developmental research is focused currently on estimating regional transactions tables, and comparing RIMS II estimates of state-specific imports and exports with survey-based estimates from the Census Bureau's Commodity Transportation Survey. RIMS II is also being adapted to analyze the regional and industrial impacts of defense procurement.

RIMS II METHODOLOGY

In order to estimate impacts such as those presented above, RIMS II uses the BEA national I-O tables which show the input and output structure of 500 industries. Since firms in all national industries are not found in each region, some direct requirements that are not produced in a study region are identified, using Bureau of Economic Analysis (BEA) 4-digit Standard Industrial Classification (SIC) county earnings data. The earnings data are used as proxies for the industry-specific input and output data which are seldom available at the small-area level. Using the same earning data, the resulting regional I-O table then can be aggregated to the level of industrial detail appropriate for the impact study.

More specifically, the RIMS II approach can be viewed as three-step process. In the first step, the national I-O matrix is made region-specific by using corresponding 4-digit SIC location quotients (LQ's). The LQ's are used to estimate the extent to which requirements are supplied by firms within the region. For this purpose, RIMS II employs LQ's based on two types of data. According to this mixed-LQ approach, BEA county personal income data, by place of residence, are used for the calculation of LQ's in the service sectors, while BEA earnings data, by place of work, are used for the LQ's in the nonservice sectors.

The second step involves estimations of the household row and the household column of the matrix. The household-row coefficients are estimated based on value-added gross-output ratios from the national I-O table and introduced into each industry's coefficient column. A household column is constructed, based on national consumption and savings rate data and national and regional tax rate data.

The last step in the RIMS II estimating procedure is to calculate the multipliers. Since it is most often necessary to trace the impact of changes in final demand on numerous individual directly- and indirectly-affected industries, RIMS II applications employ the Leontief inversion approach for obtaining multipliers. This inversion process produces output and earnings multipliers for all additionally affected industries.

ACCURACY OF RIMS II

Empirical tests of the accuracy of RIMS II multipliers indicates that RIMS II yields estimates that are not substantially different from those generated by regional I-O models based on the costly gathering of survey data. For example, a comparison of 224 industry-specific multipliers from survey based tables for Massachusetts, Washington, and West Virginia indicate that the RIMS II average multipliers overestimate the average multipliers from the survey based tables by approximately 5 percent, and, for the majority of individual industry-specific multipliers is less than 10 percent. In addition, RIMS II and survey multipliers show a statistically-similar distribution of affected industries.

ADVANTAGES OF RIMS II

There are numerous advantages to RIMS II. First, it is possible to provide estimates of economic impact without building a complete survey I-O model for each region under study, since RIMS II produces multipliers that are derived from secondary data sources. Second, the RIMS II multipliers are derived from a limited number of secondary data sources, thus eliminating the costs associated with the compilation of data from a wide variety of these sources. Third, because of the disaggregated sectoring plan employed by RIMS II, analysis maybe performed at a detailed industrial level, thereby avoiding aggregation errors that often occur when different industries are combined. Fourth, the RIMS II multipliers are based on a consistent set of procedures across areas, thus making comparisons among areas more meaningful than would be the case if the results were obtained from incompatible impact models designed only for an individual area. Fifth, the multipliers can be updated to reflect the most recent local area

earning and personal income data. The industrial output and personal earnings impacts estimated by RIMS II can be crucial for estimating effects not directly specified by RIMS II itself. For example, the estimation of regional, fiscal, labor migration, and environmental effects often depends on the estimation of the regional output and earnings impact of the initial stimulus. Since many of these important effects are often best analyzed on a case-by-case basis, one of the major advantages of using RIMS II is that valuable research resources can be spent on the analysis of these effects, rather than on the construction of an impact model. Therefore, when using RIMS II, a cost-effective impact study might devote most of its research budget to specifying initial impacts in industry specific detail, and analyzing the implications for other important aspects of regional economic activity of the RIMS II estimates impacts.

APPLICATIONS OF RIMS II

RIMS II multipliers, like the original RIMS multipliers, can be used in various types of impact studies. For example, the U.S. Nuclear Regulatory Commission has used RIMS II multipliers in the environmental impact statements required for licensing nuclear electricity-generated facilities. The U.S. Department of Housing and Urban Development (HUD) has used RIMS multipliers to assess the effects of various types of urban redevelopment expenditures. Specifically, BEA was able to quantify probable regional impacts based on the size, type, and location of the numerous individuals and groups outside the Federal Government. These multipliers have been used in analyzing the regional economic impacts of various projects, such as the operation of a prototype coal gasification plant, the expansion of port facilities, the reclamation of strip-mined land, the adoption of alternative energy futures, and the construction of mass transit facilities.

In August 1982, Association for University Business and Economic Research (AUBER) published a paper, "RIMS II: Overview and Applications," which, in addition to presenting an annotated review of regional economic modeling approaches, describes the results of several recent applications of RIMS II and indicates several on-going RIMS II-based research projects. The paper is contained in Readings in Business and Economic Research (Vol. 3), available from Professor William A. Strang, Secretary-Treasurer of AUBER, Office of Research Administration, Graduate School of Business, University of Wisconsin-Madison, 1155 Observatory Drive, Madison, Wisconsin 53707.

A paper, "Trade in Regional I-O Tables", presented at the 1984 annual meetings of the Southern Regional Science Association, describes ongoing research undertaken (1) to evaluate further the usefulness of the techniques underlying RIMS II, and (2) to extend the RIMS II model beyond the estimation of regional transactions tables, as well as the levels of industry-specific imports and exports by state. As discussed in the paper, the research to date has focused on comparisons of estimates from the Census Bureau's Commodity Transportation Survey with those from RIMS II-based models. The report is available for copying cost (\$10.00) from the Regional Economic

Analysis Division, BE-61, Bureau of Economic Analysis, U.S. Department of Commerce Washington, D.C. 20230.

RIMS II MULTIPLIERS

RIMS II multipliers are intended to show the total regional effects on industrial output and personal earnings for any county or group of counties in the United States and for any of the 500 industrial sectors in the 1972 and 1977 BEA national I-O tables. More specifically, RIMS II multipliers can be used to estimate changes in total regional output and earnings resulting from changes in regional final demand for the output of specific industries. Regional output in the I-O context is similar to sales and includes sales to industries in the region and to final demand. In RIMS II, final demand includes sales to government, other regions, and capital formation.

For example, based on RIMS II multipliers, \$1 million of new warehouse construction in the Denver-Boulder, Colorado MSA would increase personal earnings in the MSA by \$.7 million; the same expenditure in the Wilmington, North Carolina MSA would increase earnings there by \$.5 million. The difference between the earnings impacts in the two MSA's occurs because the Denver-Boulder economy locally provides more of the total input requirements for construction of warehouses than does the Wilmington economy. In general, multipliers are smaller in smaller regional economies. However, multipliers and estimated regional impacts also depend on which industry is initially affected. For example, if the initial \$1 million were spent on the maintenance and repair of streets in Wilmington, the earnings effect there would be \$.7 million, which is the same as the effect of a \$1 million expenditure for warehouse construction in the larger Denver-Boulder metropolitan area.

This overview briefly describes RIMS II multipliers, the multiplier-estimation procedures, and some of the advantages and uses of RIMS II. For additional information, see *Regional Input-Output Modeling Systems (RIMS II)*, which is available from the U.S. Government Printing Office.

Appendix G:

Top 6 Nonagricultural Industries by Payroll and Employment in Tennessee in 2004

Based on total payroll income, travel and tourism was Tennessee's third largest industry, generating more than \$4.7 billion in wages in 2004.

Travel and tourism was the state's largest employer, providing 175.7 thousand jobs for Tennessee residents in 2004.

Top 6 Industries by Nonfarm Payroll (Tennessee, 2004)

<u>Rank</u>	<u>NAICS Code*</u>	<u>Industry Name</u>	<u>Total Wages (\$ Millions)</u>
1	621	Ambulatory health care services	\$5,083
2	541	Professional and technical services	5,031
3		Travel & Tourism***	4,736
4	561	Administrative and support services	4,086
5	622	Hospitals	3,423
6	423	Merchant wholesalers, durable goods	3,110

Top 6 Industries by Nonfarm Employment (Tennessee, 2004)

<u>Rank</u>	<u>NAICS Code*</u>	<u>Industry Name</u>	<u>Total Employment (Thousands)</u>
1		Travel & Tourism***	175.7
2	561	Administrative and support services	170.6
3	722	Food services and drinking places	125.8
4	621	Ambulatory health care services	102.0
5	541	Professional and technical services	100.2
6	622	Hospitals	87.0

Sources: TIA, U.S. Bureau of Labor Statistics.

Notes: * The 1997 North American Industry Classification System. NAICS 541 includes certain professional and business services (formerly SICs 73, 87). NAICS 561 includes business services NEC (formerly SIC 7389).

** Excludes wages or jobs attributable to the domestic travel and tourism industry.

*** Payroll and employment generated by both domestic and international travel spending.