

West Virginia Travel Impacts

2000 - 2018p



October 2019

Prepared for the

West Virginia Tourism Office
Charleston, West Virginia

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Dean Runyan Associates
833 SW Eleventh Avenue, Suite 920
Portland, OR 97205
503/226-2973
www.deanrunyan.com

Preface

The purpose of this study is to document the economic significance of the travel industry in West Virginia from 2000 to 2018. These findings show the level of travel spending by visitors traveling to and within the state and the impact this spending had on the economy in terms of earnings, employment, and tax revenue.

Dean Runyan Associates prepared this study for the West Virginia Tourism Office. Dean Runyan Associates has specialized in research and planning services for the travel, tourism and recreation industry since 1984. With respect to economic impact analysis, the firm developed and currently maintains the Regional Travel Impact Model (RTIM), a proprietary computer model for analyzing travel economic impacts at the state, regional and local level. Dean Runyan Associates also has extensive experience in project feasibility analysis, market evaluation, survey research, and travel and tourism planning.

Many individuals and agencies provided information and advice for this report. Among the organizations involved in this effort were the West Virginia Department of Tax and Revenue, the West Virginia Racing Commission, the West Virginia Lottery, and the West Virginia State Parks and Forests. Federal agencies that provided assistance included the USDA Forest Service, the Department of Labor and the Bureau of Economic Analysis.

Dean Runyan Associates
833 SW 11th Ave., Suite 920
Portland, OR 97205
(503) 226-2973
www.deanrunyan.com

TABLE OF CONTENTS

	page
I. Introduction	1
II. National Trends	5
III. West Virginia Travel Impacts	9
Direct Impacts of Travel in West Virginia: A Summary	
Gross State Product	
IV. Regional Travel Impacts	20
V. County Overnight Visitor Impacts	42
Appendices	
A. Regional Travel Impact Model (RTIM) Methodology	56
B. Definition of Terms	57
C. Travel Industry Business Classifications	59

LIST OF TABLES AND FIGURES

	page
<hr/>	
State Travel Impacts	
West Virginia Direct Travel Impacts, 2000-2018p	11
West Virginia Visitor Spending Adjusted for Inflation, 2000-2018p	12
West Virginia Visitor Spending by Type of Traveler Accommodation, 2018p	12
West Virginia Visitor Spending by Commodity Purchased, 2018p	13
West Virginia Direct Employment Generated by Travel Spending, 2018p	13
State and Local Travel-Generated Government Revenue, 2018p	14
West Virginia Overnight Visitor Volume 2018p	14
West Virginia Visitor Impacts, 2000-2008	15
West Virginia Visitor Impacts, 2010-2018p	16
West Virginia Average Expenditures & Overnight Visitor Volume 2016-2018p	17
West Virginia Travel Industry Gross Domestic Product, 2018	18
West Virginia Gross Domestic Product: Selected Export-Orientated Industries	19
Regional Travel Impacts	
Northern Panhandle Travel Impacts, 2008-2018p	22
Mid-Ohio Valley Travel Impacts, 2008-2018p	24
Metro Valley Travel Impacts, 2008-2018p	26
Mountain Lakes Travel Impacts, 2008-2018p	28
New River/Greenbrier Valley Travel Impacts, 2008-2018p	30
Potomac Highlands Travel Impacts, 2008-2018p	32
Eastern Panhandle Travel Impacts, 2008-2018p	34
Mountaineer Country Travel Impacts, 2008-2018p	36
Hatfield-McCoy Mountains Travel Impacts, 2008-2018p	38
Summary: Regional Travel Impacts, 2018p	39-40
County Travel Impacts	
Barbour through Clay, 2008-2018p	44
Doddridge through Hardy, 2008-2018p	45
Harrison through McDowell, 2008-2018p	46
Marion through Monroe, 2008-2018p	47
Morgan through Putnam, 2008-2018p	48
Raleigh through Tyler, 2008-2018p	49
Upshur through Wyoming, 2008-2018p	50
Overnight Visitor Volume by County, 2018p	51
Total & Travel-Generated Employment and Earnings by County, 2018p	52-53
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I. Introduction

Visitors traveling to and throughout West Virginia represent an important component of the state's economy. Travel originating in domestic and international markets generates business sales, payroll, employment and tax receipts for the state as well as for local jurisdictions. Further, many locations within West Virginia serve as travel destinations in their own right. These areas accordingly consider travel and tourism a primary industry.

Objectives

This report describes the economic impacts of travel to and through the state of West Virginia and each of its 55 counties from 2000 to 2018. Previous estimates may be slightly adjusted when original data sources are revised. Detailed breakouts of travel impacts are provided at the state level, for the nine tourism regions, and for the 55 counties. A primary objective of this research is to provide reliable, detailed figures that allow comparisons from year-to-year for the state and county levels.

Direct Impacts

The estimates of the direct impacts associated with traveler spending in West Virginia were produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The input data used to detail the economic impacts of the West Virginia travel industry were gathered from various local, state and federal sources. Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are also broken out by type of traveler accommodation and by the type of business in which the expenditures occur. A description of RTIM methodology is included in Appendix A.

Gross State Product

An estimate of the Gross State Product of the travel industry is also included in this report. Gross State Product is a measure of industry output that excludes the value of intermediate inputs purchased from businesses in other industries. As a single measure, it provides a more meaningful gauge of industry output than spending, earnings, or tax receipts. It also permits comparisons with other industries.

Types of Travel Impacts Included

Most of the travel that occurs in West Virginia is included in the scope of this analysis. The purpose of such travel can be for business, pleasure, shopping, to attend meetings, or for personal, medical, or educational purposes. All trips to West Virginia by U.S. residents and foreign visitors are included. The travel of West Virginia residents to other destinations in West Virginia is included, provided that it is neither commuting nor other routine travel. Travel to non-West Virginia destinations by West Virginia residents is not included as a component of visitor spending.

The impacts associated with travel are included if the travelers remain at the destination overnight and day travel for both in-state and out-of-state residents whose trip does not include an overnight stay at a destination in West Virginia. In general, the terms “traveler” and “visitor” are used interchangeably in this report. Both represent a person who is traveling in the state of West Virginia, away from his or her home, on a trip as defined above.

State and Local Government Revenue

Approximately two-thirds of all travel-generated government revenue accrues to state government in West Virginia. State taxes include the 6 percent state sales tax, the motor fuel tax, income taxes on travel-generated earnings and travel-related business income, and state revenue generated through racetrack video lottery and wagering (distributed by the West Virginia Lottery and the West Virginia Racing Commission). Local taxes consist of the Hotel/Motel Occupancy Tax and the Business & Occupation Tax, levied by municipal governments in West Virginia. The West Virginia Lottery makes distributions to racetrack and non-racetrack counties and municipalities throughout the state.

Transportation Impacts

The focus of this analysis is on the destination-specific impacts of visitors. This is straightforward with respect to the spending on commodities such as accommodations, food services, recreation, and retail purchases. It is less obvious with respect to ground and air transportation services, in that transportation provides a link between an origin and destination. In this report, the impacts related to spending on transportation are allocated to the location (i.e., region or county) in which those spending impacts occur, regardless of whether that location is the ultimate destination of the visitor. For this reason, counties with urban centers will tend to have relatively greater transportation impacts even though some of that spending on transportation will be related to visits at other destinations.

Impact Categories

Impact Category	Description
Expenditures	Purchases by travelers during their trip, including hotel/motel occupancy taxes and other applicable local and state taxes, paid by the traveler at the point of sale.
Total Earnings	The earnings (wage and salary disbursements, earned benefits, and proprietor income) of employees and owners of businesses that receive travel expenditures. Only the earnings attributable to travel expenditures are included; this typically is only a port.
Employment	Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.
Local Tax Receipts	Hotel/motel occupancy tax levied by cities and counties. Property taxes are not included.
State Tax Receipts	State exise taxes including sales and motor fuel taxes, income taxes attributable to travel-generated personal earnings and business receipts, and payments made from gaming revenue (levied by the West Virginia Lottery and the West Virginia Racing Commission).

Visitor Categories

Type of Visitor	Description
Hotel/Motel/ B&B Guest	Travelers staying in hotels, motels, resorts, bed & breakfast establishments, and other commercial accommodations, excluding campgrounds, where a hotel/motel occupancy tax is collected.
Private Camper	Travelers staying in a privately owned (i.e., commercial) campground..
Public Camper	Travelers staying in a publicly managed campground such as those managed by West Virginia State Parks and Forests, the U.S. Forest Service, or the National Park Service.
Private Home Visitor	Travelers staying as guests with friends or relatives.
Vacation Home Visitor	Travelers using their own vacation home or timeshare and those borrowing or renting a vacation home where hotel/motel occupancy tax is not collected.
Day Visitor	Both in-state and out-of-state residents whose trip does not include an overnight stay at a destination in West Virginia.

Report Contents

Section II provides an overview of Travel Impacts in the state, detailed estimates for 2000 through 2018, an estimate of gross state product, and the relative impacts for counties measured in terms of the proportion of total earnings and employment that is travel-generated. Section III details estimates for the nine tourism regions. Section IV contains summary estimates for all of West Virginia's 55 counties.

The first part of this section focuses on the direct impacts of travel spending. This section provides an overview of travel-generated impacts since 2000, including state and local tax revenues directly generated by travel spending. More detailed travel impacts for the state are reported on the following pages.

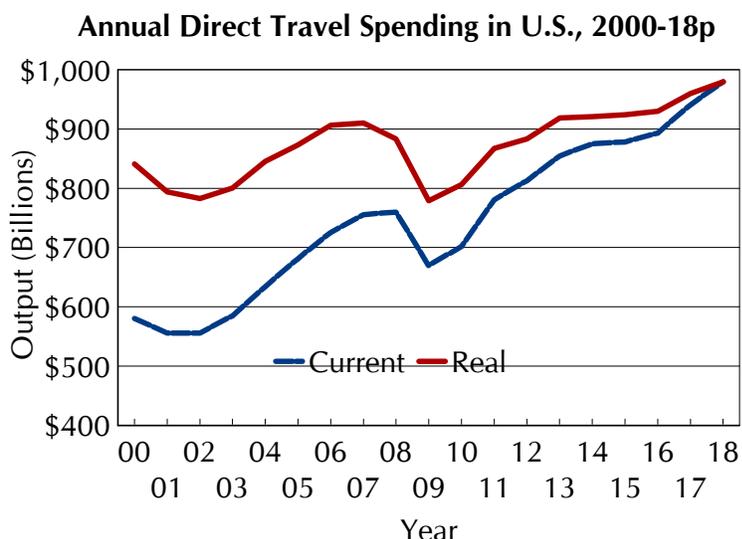
A description of the RTIM methodology is included in Appendix A. Definitions of the travel terms used in this report can be found in Appendix B. Appendix C provides a description of travel industries in terms of NAICS.

II. NATIONAL TRAVEL TRENDS

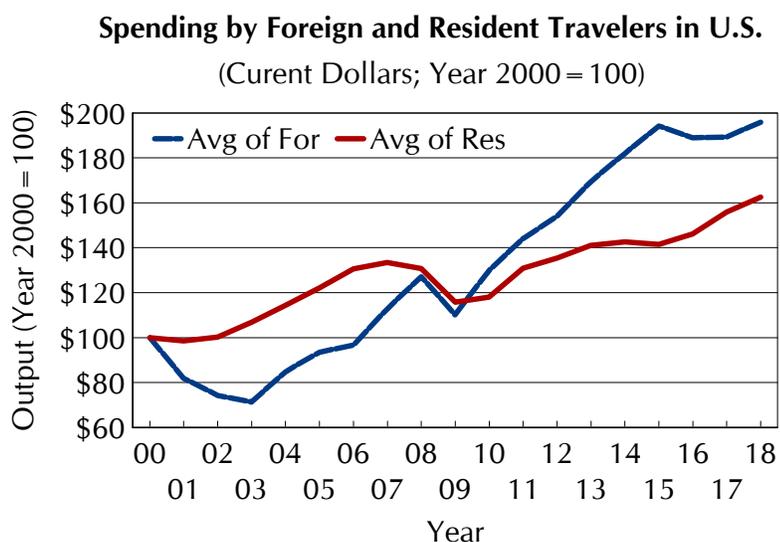


The national level data in this section focuses on visitor spending trends in current and real dollars, resident and foreign visitor spending in the U.S., and trends in travel-generated employment.

The following two graphs are derived from the Bureau of Economic Analysis Travel and Tourism Satellite Accounts*. Both graphs show direct tourism output for the United States - spending by resident and foreign visitors. 2018p has been estimated by Dean Runyan Associates.



Spending by resident and foreign visitors was \$980 billion in 2018 in current dollars. This represents a 4.1 percent increase over 2017. When adjusted for changes in prices (real dollars), spending increased by 2.0 percent from 2017 to 2018 compared to a 3.2 percent increase for the preceding year.



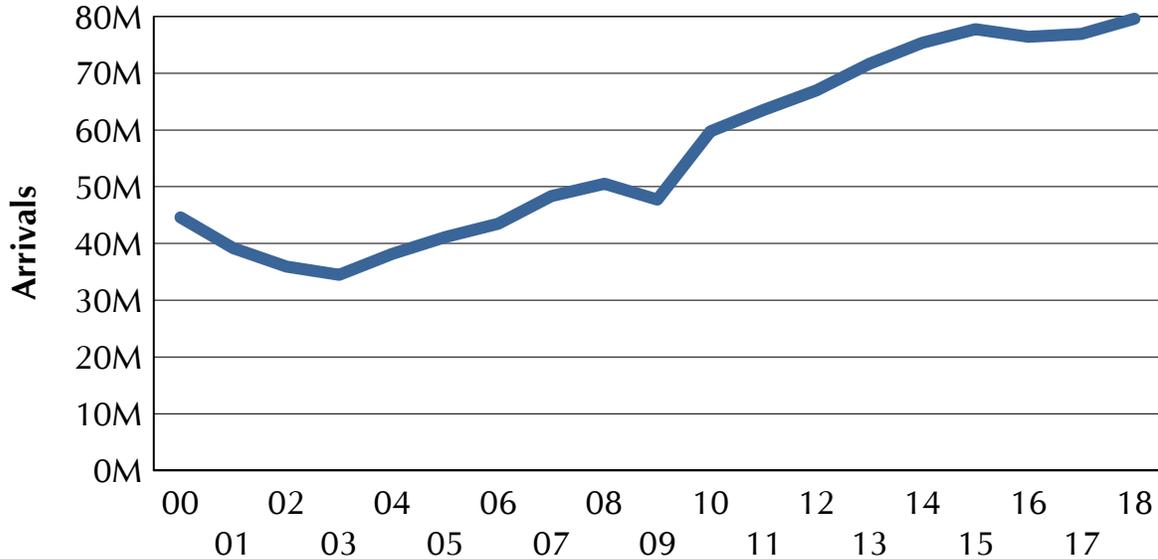
The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2018, the increase in spending by resident visitors (4.2 percent) compares to a 3.5 percent decrease in non-resident spending. Visitor spending by non-residents increased by 6.8 percent from 2014 to 2015.

Note: Foreign visitor spending does not include expenditures on health and educational services or expenditures by short term seasonal workers.

*See <http://www.bea.gov/industry/index.htm#satellite>.

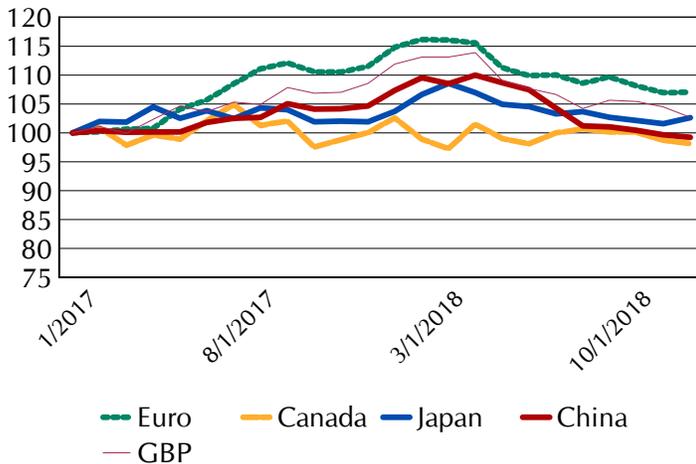
Foreign arrivals increased 3.5 percent from 2017 to 2018. The dollar continues to remain strong against selected foreign currencies. This can apply downward pressure on international spending by lessening the purchasing power of the international visitor that has traveled to the U.S.

Overseas arrivals to the U.S.



Relative Value of Selected Foreign Currencies compared to U.S. Dollar

Monthly Averages, Jan 2017 through December 2018



Sources:

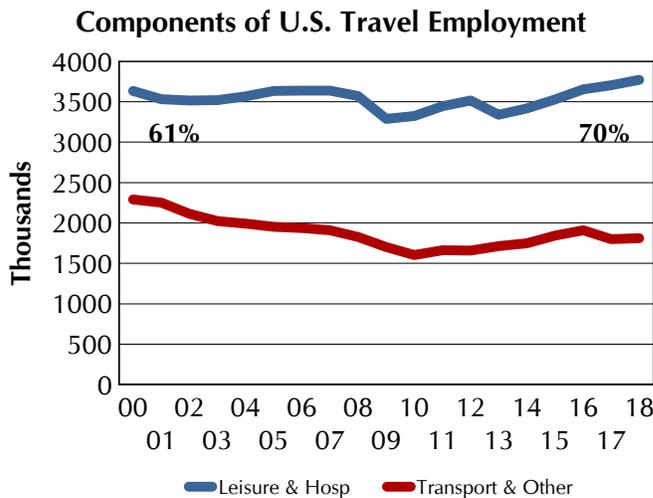
Overseas Arrivals: National Travel & Tourism Office, U.S. Department of Commerce.

Relative Value of Selected Foreign Currencies: USForex, Inc. (www.usforex.com)

The following two graphs show employment trends since 2000 and the composition of travel industry employment since the recession. The first graph shows that travel-generated employment recovered from the 2008-09 recession by 2016. Leisure and hospitality employment was 3.8 million in 2018 or 70 percent of total travel industry employment, compared to 3.6 million in 2000 or 61 percent of the total. Most of this growth was due to food services employment. Additionally, employment in transportation and other industries declined over the same period from 2.3 million to 1.8 million, mostly due to decreased employment in the airline and related transportation industries.

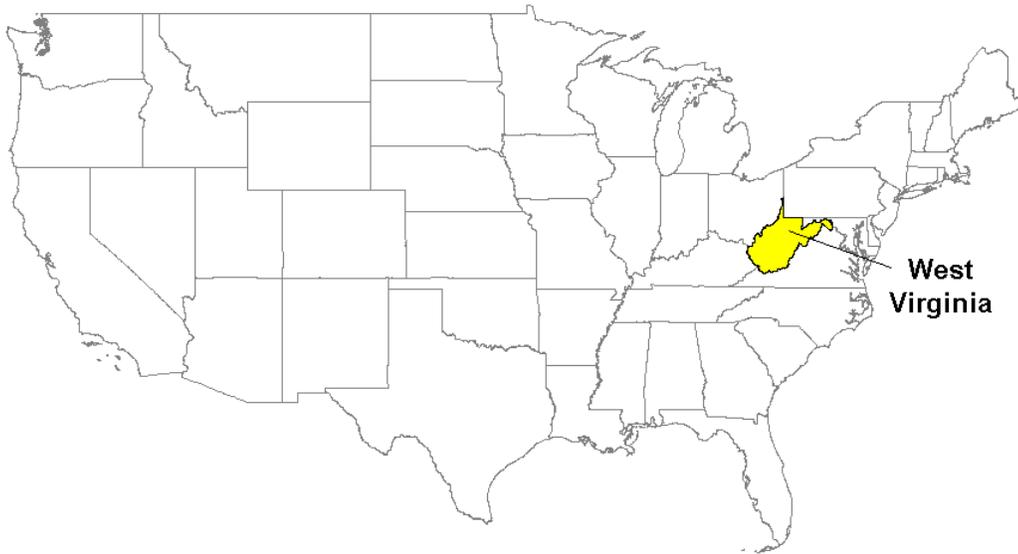


Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts.



Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts. Leisure & hospitality includes accommodations, food services, and arts, entertainment & recreation. Transportation and other includes retail and all other industries.

III. WEST VIRGINIA TRAVEL IMPACTS 2000-2018p



West Virginia's \$4.6 billion in travel-generated spending is a vital part of the state and local economies. In some areas of the state, it is one of the primary sources of earnings and employment. The types of business that serve travelers are represented primarily by service and retail firms, including lodging establishments, restaurants, gaming establishments, recreation-orientated businesses, retail stores, gasoline service stations, transportation, and other travel-related services. The money that is spent on these goods and services in West Virginia produces business receipts at these firms, which in turn employ West Virginia residents. State and local government units benefit from the travel industry as well through the collection of taxes on the sale of goods and services and on the income generated by these sales.

Direct Impacts of Travel in West Virginia: A Summary

- Travel spending by all overnight and day visitors in West Virginia grew for the second consecutive year after four years of decline, increasing by nearly 10 percent (2016 to 2018). In the 2018 calendar year, travel spending was \$4.6 billion compared to \$4.3 billion in 2017, equivalent to approximately \$12.5 million dollars per day.
- From 2017 to 2018, West Virginia travel spending increased by 6.5 percent including gaming spending, and 7.5 percent excluding gaming spending, compared to the national travel spending increase of 4.1 percent.
- During 2018, visitor spending in West Virginia directly supported about 45,400 jobs with earnings of nearly \$1.2 billion. Travel spending generated the greatest number of jobs in accommodations & food services, and arts, entertainment, recreation.
- Local and state government revenues generated by travel spending were \$534.5 million in 2018, an increase of 3.3 percent (does not include property taxes). Without these government revenues generated travel spending, each household in West Virginia would have had to pay an additional \$720 per year in state and local taxes to maintain current service levels.
- In 2018 overnight visitor volume was 12.2 million person trips. Overnight visitor volume grew 3.8 percent (person-trips) in 2018. Commercial lodging was the largest contributor to the growth, with person trips growing at 9.2 percent.
- Visitors who stayed overnight in commercial lodging facilities spent \$1.7 billion in 2018 - or about one-third of all visitor spending in the state. Day travelers who spent substantially on gaming and entertainment spent \$1.9 billion.

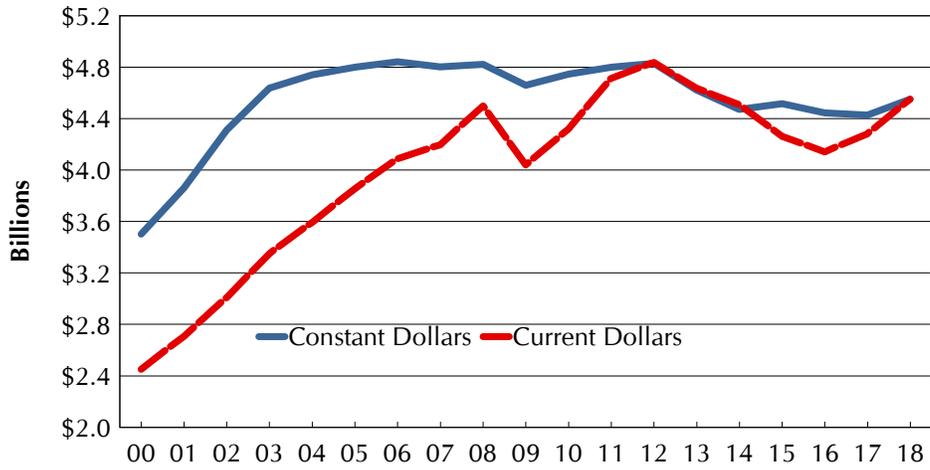
The following tables and graphs document these travel impacts. Detailed travel impact estimates for the state from 2000 to 2018 are found on pages 15 and 16.

West Virginia Direct Travel Impacts, 2000-2018p

	Spending (\$Million)	Spending w/o Gaming (\$Million)	Earnings (\$Million)	Employment (Thousand)	Government Revenue (\$Million)		
					Local	State	Total
2000	2,450	2,083	610	36.0	15.1	280.8	295.9
2001	2,708	2,201	667	38.4	17.7	340.6	358.3
2002	3,010	2,374	734	40.8	20.7	396.1	416.8
2003	3,349	2,591	787	42.5	23.3	449.5	472.8
2004	3,594	2,759	815	42.9	26.2	525.7	551.9
2005	3,855	2,976	848	44.3	27.8	536.3	564.1
2006	4,088	3,173	874	44.6	30.5	552.4	582.9
2007	4,195	3,301	904	44.4	32.4	556.4	588.8
2008	4,499	3,584	931	44.7	42.2	557.0	599.2
2009	4,039	3,165	942	44.6	41.1	545.7	586.7
2010	4,324	3,482	998	45.0	45.5	534.6	580.2
2011	4,713	3,823	1,025	45.3	54.4	533.8	588.2
2012	4,836	3,929	1,065	46.2	58.6	543.4	601.9
2013	4,633	3,845	1,064	46.5	53.9	492.3	546.2
2014	4,505	3,797	1,075	46.2	49.9	477.6	527.5
2015	4,258	3,562	1,104	44.8	53.8	484.6	538.4
2016	4,142	3,484	1,118	44.9	51.6	474.5	526.2
2017	4,277	3,633	1,131	44.8	50.0	467.2	517.2
2018p	4,554	3,907	1,184	45.4	53.3	481.2	534.5
<i>Annual Percent Change</i>							
17-18p	6.5%	7.5%	4.7%	1.4%	6.6%	3.0%	3.3%
00-18p	3.5%	3.6%	3.8%	1.3%	7.3%	3.0%	3.3%
<i>Two-Year Percent Change</i>							
16-18p	9.9%	12.2%	5.9%	1.0%	3.3%	1.4%	1.6%

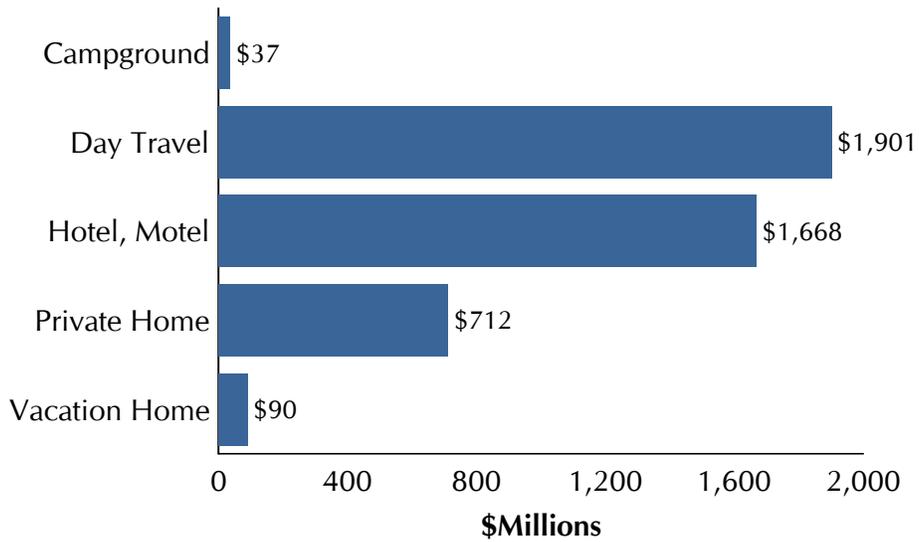
Note: Estimates for 2018p are preliminary. One-way visitor airfares are included. Total Earnings includes wage and salary disbursements, other earned income and proprietor income. Employment includes full- and part-time employees and self-employed. Government revenue includes the state share of racetrack video lottery and wagering, local hotel/motel taxes, state sales and income taxes, and the gasoline tax. Property taxes are not included. Annual Change refers to the average annual change. Details may not add to totals due to rounding.

West Virginia Visitor Spending Adjusted for Inflation, 2000-2018p

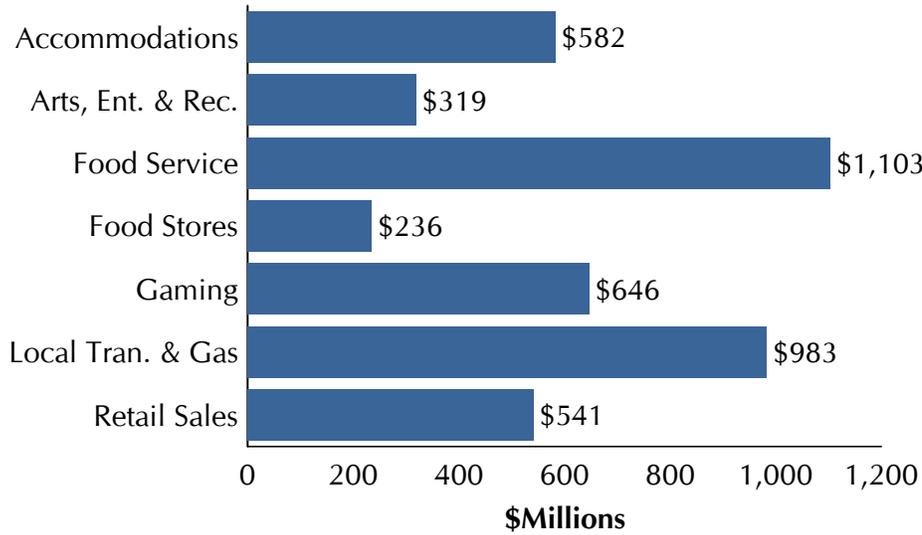


Source: Dean Runyan Associates

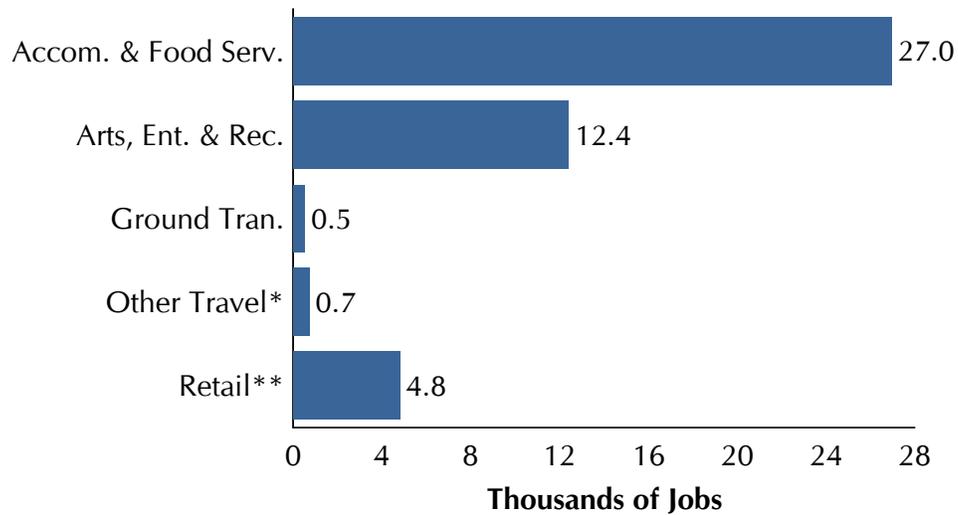
West Virginia Visitor Spending by Type of Traveler Accommodation, 2018p (\$Millions)



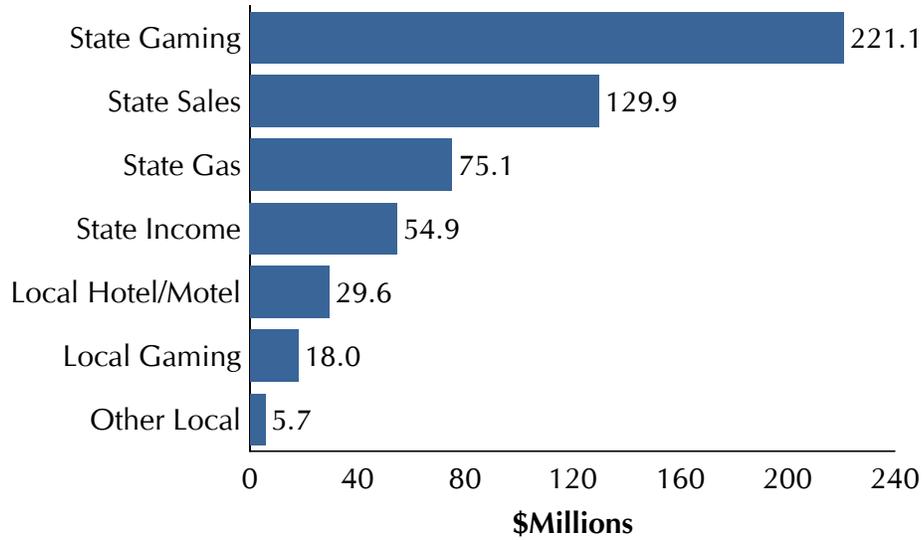
**West Virginia Visitor Spending
by Commodity Purchased, 2018p**
(\$Millions)



**West Virginia Direct Employment
Generated by Travel Spending, 2018p**
(Thousands of Jobs)

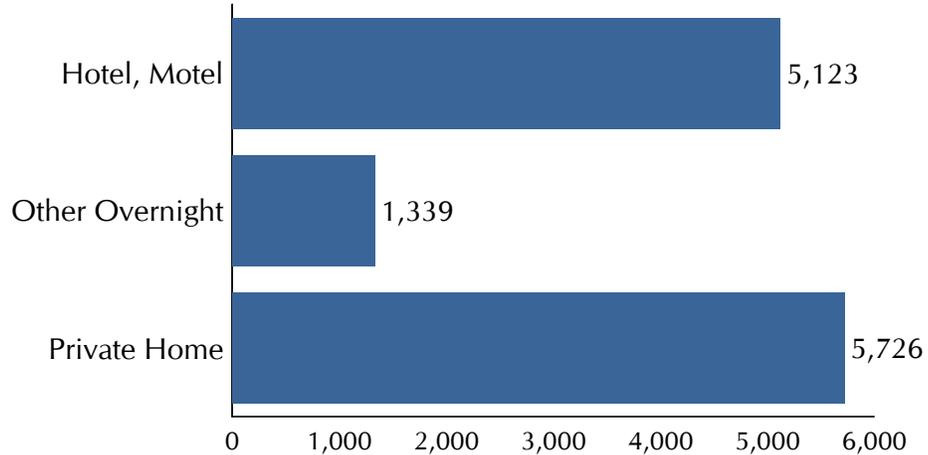


**State and Local Travel-Generated
Government Revenue, 2018p**
(\$Millions)



Overnight Visitor Volume, 2018p

Person Trips (000's)



West Virginia Travel Impacts, 2000-2012

Total Direct Travel Spending (\$Million)								
	2000	2002	2004	2006	2008	2010	2011	2012
Destination Spending	2,369.7	2,926.0	3,479.9	3,958.2	4,368.4	4,194.0	4,580.7	4,699.1
Other Travel*	80.6	83.5	114.1	129.4	130.7	125.2	132.6	136.7
Total	2,450.3	3,009.5	3,594.0	4,087.6	4,499.1	4,319.1	4,713.3	4,835.8
Visitor Spending by Type of Traveler Accommodation (\$Million)								
	2000	2002	2004	2006	2008	2010	2011	2012
Hotel, Motel	915.3	998.1	1,101.6	1,232.0	1,405.5	1,338.5	1,490.1	1,577.4
Campground	18.5	22.7	24.1	27.8	36.8	36.6	41.1	39.8
Private Home	464.4	480.4	560.9	659.3	770.0	731.5	795.6	793.7
Vacation Home	62.5	64.6	73.4	83.9	95.0	91.7	98.9	99.6
Day Travel	909.1	1,360.3	1,719.8	1,955.2	2,061.1	1,995.8	2,155.0	2,188.5
Total	2,369.7	2,926.0	3,479.9	3,958.2	4,368.4	4,194.0	4,580.7	4,699.1
Visitor Spending By Commodity Purchased (\$Million)								
	2000	2002	2004	2006	2008	2010	2011	2012
Accommodations	329.9	352.6	373.1	398.9	432.5	420.6	461.6	505.8
Food Service	477.3	593.7	666.6	726.7	789.8	842.5	884.7	926.8
Food Stores	127.8	149.2	161.9	173.1	191.4	198.2	210.9	219.8
Local Tran. & Gas	437.8	481.2	696.4	980.1	1,279.2	1,106.5	1,323.0	1,297.5
Arts, Ent. & Rec.	232.8	257.8	272.6	278.2	277.9	278.4	286.2	300.2
Retail Sales	396.4	455.9	474.5	486.7	481.9	505.6	524.9	541.7
Others	367.6	635.7	834.6	914.5	915.5	842.1	889.5	907.3
Total	2,369.7	2,926.0	3,479.9	3,958.2	4,368.4	4,194.0	4,580.7	4,699.1
Industry Earnings Generated by Travel Spending (\$Million)								
	2000	2002	2004	2006	2008	2010	2011	2012
Accom. & Food Serv.	300.7	352.4	388.9	428.0	468.5	490.2	507.7	535.4
Arts, Ent. & Rec.	179.9	230.8	270.4	282.2	299.6	338.0	344.0	353.6
Retail**	92.9	106.0	109.2	114.6	118.7	126.0	129.4	131.7
Ground Tran .	9.9	12.5	13.9	14.9	15.5	15.3	16.0	16.5
Other Travel*	26.2	32.6	32.9	34.1	28.8	27.7	28.1	28.0
Total	609.6	734.2	815.4	873.7	931.1	997.1	1,025.2	1,065.2
Industry Employment Generated by Travel Spending (Jobs)								
	2000	2002	2004	2006	2008	2010	2011	2012
Accom. & Food Serv.	19,590	22,030	23,380	24,820	25,290	25,310	25,590	26,220
Arts, Ent. & Rec.	9,420	11,220	12,300	12,680	12,640	13,150	13,090	13,380
Retail **	5,050	5,350	5,250	5,360	5,170	5,160	5,180	5,210
Ground Tran	450	540	530	540	550	530	540	560
Other Travel *	1,520	1,630	1,480	1,210	1,030	840	860	800
Total	36,040	40,770	42,940	44,630	44,690	44,990	45,270	46,160
Tax Receipts Generated by Travel Spending (\$Million)								
	2000	2002	2004	2006	2008	2010	2011	2012
Local Tax Receipts	15.1	20.7	26.2	30.5	42.2	45.5	54.4	58.6
State Tax Receipts	280.8	396.1	525.7	552.4	557.0	534.3	533.9	543.4
Federal Tax Receipts	140.4	165.6	190.0	197.9	208.8	217.8	204.3	208.1
Total	436.3	582.4	741.9	780.8	808.0	797.6	792.5	810.0

* Other Travel includes resident air travel and travel agencies. ** Retail includes gasoline.

- Values are not reliable for reporting purpose. Details may not add to totals due to rounding.

West Virginia Travel Impacts 2013-2018p

Total Direct Travel Spending (\$Million)						
	2013	2014	2015	2016	2017	2018
Destination Spending	4,501.5	4,375.2	4,127.3	4,012.5	4,147.0	4,409.1
Other Travel*	134.0	133.4	133.6	128.9	133.7	141.6
Total	4,635.6	4,508.6	4,260.9	4,141.3	4,280.8	4,550.7
Visitor Spending by Type of Traveler Accommodation (\$Million)						
	2013	2014	2015	2016	2017	2018
Hotel, Motel	1,523.0	1,487.2	1,456.0	1,417.9	1,499.6	1,668.4
Campground	40.0	38.7	34.1	33.1	34.7	37.0
Private Home	787.6	782.4	688.0	668.2	686.7	712.2
Vacation Home	98.4	97.8	89.5	86.7	88.1	90.1
Day Travel	2,052.5	1,969.1	1,859.6	1,806.6	1,838.0	1,901.4
Total	4,501.5	4,375.2	4,127.3	4,012.5	4,147.0	4,409.1
Visitor Spending By Commodity Purchased (\$Million)						
	2013	2014	2015	2016	2017	2018
Accommodations	506.3	509.2	535.4	513.4	524.6	582.4
Food Service	924.9	933.1	968.2	992.0	1,035.9	1,102.8
Food Stores	218.5	219.6	225.2	221.8	225.6	235.5
Local Tran. & Gas	1,240.3	1,197.2	885.9	815.1	888.8	982.7
Arts, Ent. & Rec.	292.7	286.3	289.8	289.3	302.7	318.7
Retail Sales	530.9	522.0	527.1	522.8	525.4	540.9
Others	788.0	707.6	695.8	658.0	644.0	646.1
Total	4,501.5	4,375.2	4,127.3	4,012.5	4,147.0	4,409.1
Industry Earnings Generated by Travel Spending (\$Million)						
	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	548.0	566.5	592.6	603.3	618.1	651.4
Arts, Ent. & Rec.	339.3	326.4	330.8	327.9	326.7	341.0
Retail**	133.1	134.8	131.9	138.5	136.7	140.7
Ground Tran .	16.8	16.8	17.2	17.5	18.0	20.1
Other Travel*	27.6	31.5	32.0	30.8	31.9	34.6
Total	1,064.8	1,076.0	1,104.5	1,118.1	1,131.4	1,187.8
Industry Employment Generated by Travel Spending (Jobs)						
	2013	2014	2015	2016	2017	2018
Accom. & Food Serv.	26,920	27,330	26,560	26,530	26,520	26,970
Arts, Ent. & Rec.	13,090	12,360	12,170	12,140	12,230	12,410
Retail **	5,270	5,270	4,870	4,980	4,800	4,810
Ground Tran	580	570	540	540	520	520
Other Travel *	710	720	730	740	750	730
Total	46,560	46,240	44,880	44,930	44,820	45,450
Tax Receipts Generated by Travel Spending (\$Million)						
	2013	2014	2015	2016	2017	2018
Local Tax Receipts	53.9	49.9	53.8	51.6	50.0	53.3
State Tax Receipts	492.4	477.9	484.8	474.5	467.4	481.1
Federal Tax Receipts	221.1	220.9	223.5	224.3	225.8	235.7
Total	767.5	748.6	762.1	750.5	743.2	770.1

Note: Estimates for 2018p are preliminary. Details may not add to totals due to rounding.

*Other Travel includes air travel and travel agencies. **Retail includes gasoline.

West Virginia Average Expenditures and Visitor Volume

Average Expenditures for Overnight Visitors, 2018

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$312	\$652	\$156	\$326	2.0	2.1
Private Home	\$89	\$263	\$42	\$124	2.1	2.9
Other Overnight	\$29	\$110	\$13	\$47	2.3	3.7
All Overnight	\$162	\$429	\$77	\$206	2.1	2.7

Overnight Visitor Volume, 2016-2018

	Person-Nights (thousands)			Party-Nights (thousands)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel	9,554	9,812	10,717	4,774	4,903	5,355
Private Home	16,923	16,849	16,892	8,001	7,966	7,986
Other Overnight	5,013	5,003	5,003	2,167	2,163	2,164
All Overnight	31,489	31,664	32,612	14,942	15,032	15,505
Annual Percentage Change		0.6%	3.0%		0.6%	3.1%

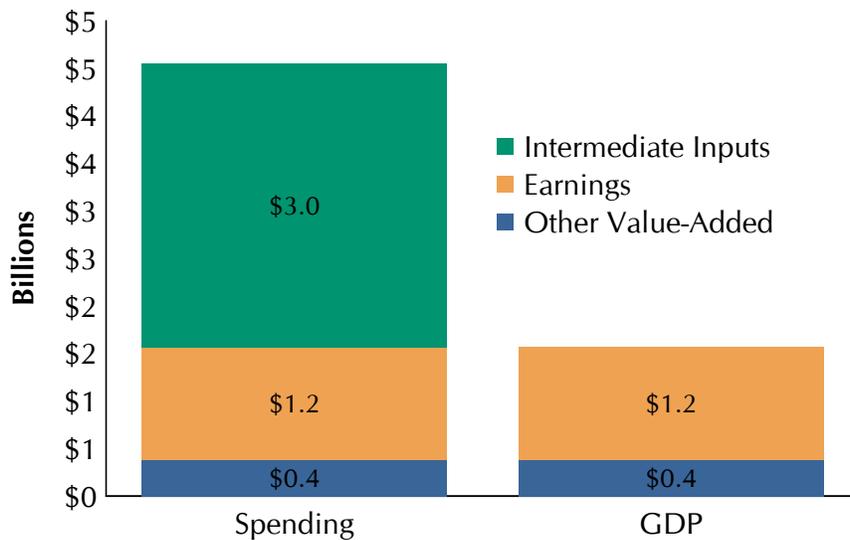
	Person-Trips (thousands)			Party-Trips (thousands)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel	4,567	4,690	5,123	2,282	2,344	2,560
Private Home	5,737	5,712	5,726	2,712	2,700	2,707
Other Overnight	1,341	1,338	1,339	580	580	580
All Overnight	11,644	11,741	12,189	5,574	5,623	5,847
Annual Percentage Change		0.8%	3.8%		0.9%	4.0%

GROSS DOMESTIC PRODUCT OF WEST VIRGINIA TRAVEL INDUSTRY

Gross Domestic Product (GDP, also referred to as value added) is a measure of economic activity that reflects the market value of the labor and capital used to produce goods and services. The GDP for a particular industry within a state excludes the intermediate inputs purchased by businesses from other firms in the production process. It includes payments to individuals in the form of earnings, indirect business taxes to government, and other payments to individuals and corporations. The relationship between travel spending and the GDP of the West Virginia travel industry is shown below. West Virginia travel industry GDP of \$1.6 billion represents approximately 2 percent of total West Virginia GDP.

About 64 percent of all travel spending in West Virginia is attributed to intermediate inputs and goods resold at retail. Intermediate inputs cover a range of goods and services that are purchased by travel industry businesses for the purpose of creating a product or service for the traveler. For example, many lodging establishments purchase cable television services. Restaurants purchase food and beverages from vendors. In both cases, these inputs are classified as the GDP of other industries. In addition, travel spending occurs at many retail establishments where the goods purchased from the retailer are purchased as finished goods from suppliers. These resold goods are also counted as the products of other industries. This would include motor fuel, groceries, and most the commodities sold at retail establishments.

**Travel Spending and Industry Gross Domestic Product
of West Virginia Travel Industry, 2018p**
(\$ Billions)

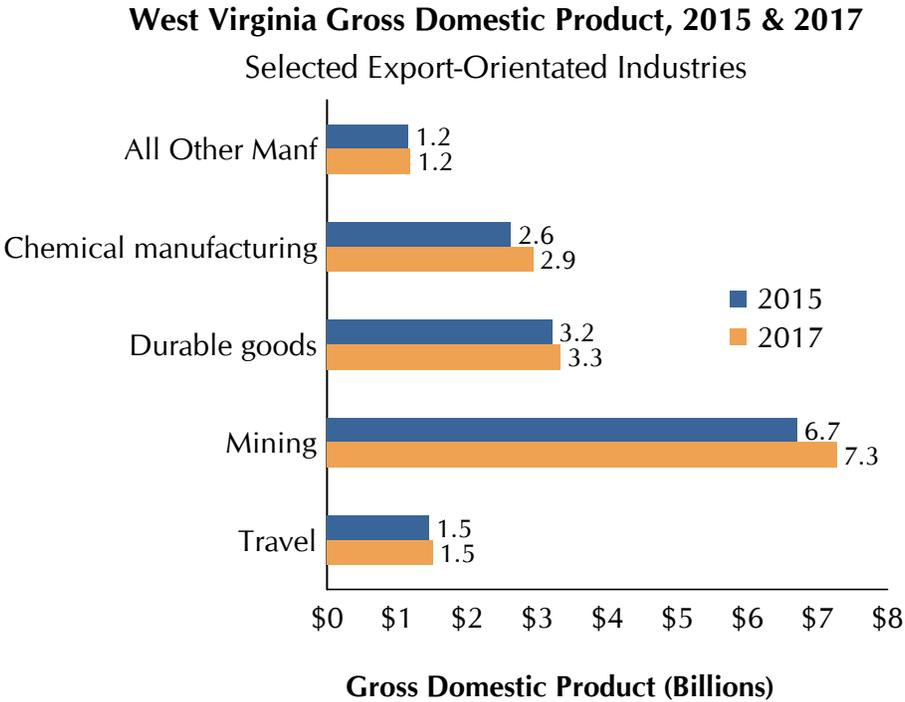


Source: Dean Runyan Associates and Bureau of Economic Analysis.

Gross Domestic Product of West Virginia Export-Orientated Industries

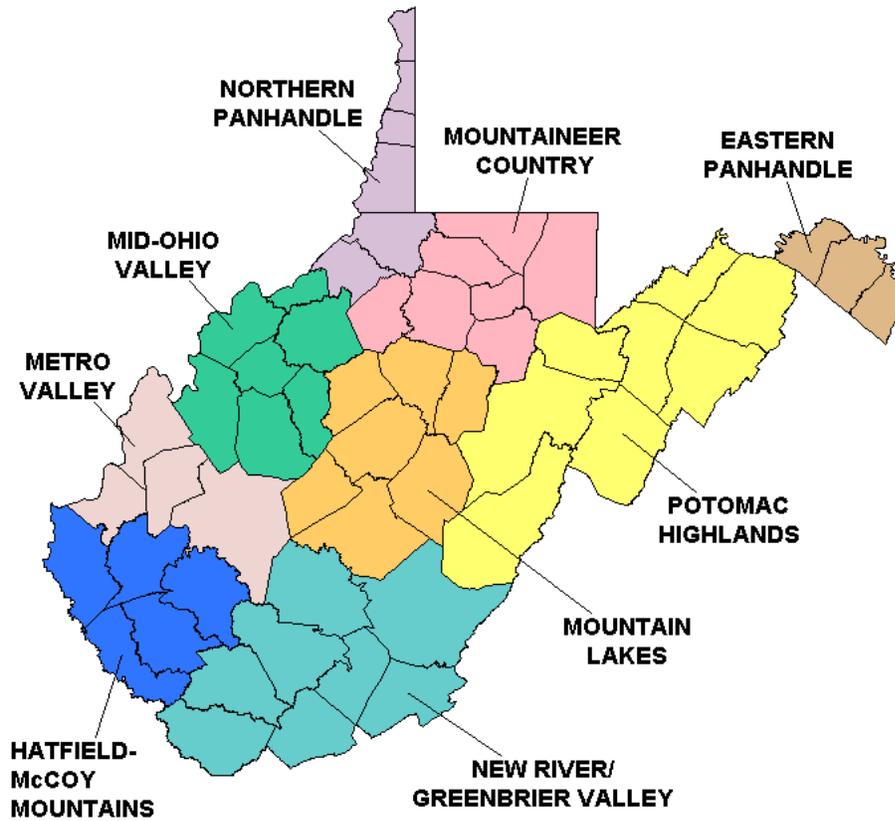
Export-orientated industries are those industries that primarily market their products and services to other regions, states, or nations. Mining, manufacturing, and chemicals are the best examples of export-orientated industries. Clearly, there are cases in each of these three sectors where the products are sold within the local or regional market. Nonetheless, in general most businesses within these industries depend on export markets. The travel industry is also an export-orientated industry because goods and services are sold to *visitors*, rather than residents. The travel industry injects money into the local economy, as do exports of other industries.

A comparison of the GDP's of the leading export-orientated industries in West Virginia is shown below. The comparison years are for 2015 and 2017 - data for 2018 is not yet available for the comparison industries.



Source: Dean Runyan Associates and Bureau of Economic Analysis.

IV. REGIONAL VISITOR IMPACTS 2008-2018p



The tables in this section provide detailed estimates for the regions of West Virginia for 2008-2018p. The geographic definitions of the regions are shown below.

West Virginia's Tourism Regions

Northern Panhandle

Brooke
Hancock
Marshall
Ohio
Tyler
Wetzel

Mid-Ohio Valley

Calhoun
Jackson
Pleasants
Ritchie
Roane
Wirt
Wood

Metro Valley

Cabell
Kanawha
Mason
Putnam

Mountain Lakes

Braxton
Clay
Gilmer
Lewis
Nicholas
Upshur
Webster

New River/Greenbrier Valley

Fayette
Greenbrier
McDowell
Mercer
Monroe
Raleigh
Summers
Wyoming

Potomac Highlands

Grant
Hampshire
Hardy
Mineral
Pendleton
Pocahontas
Randolph
Tucker

Eastern Panhandle

Berkeley
Jefferson
Morgan

Mountaineer Country

Barbour
Doddridge
Harrison
Marion
Monongalia
Preston
Taylor

Hatfield-McCoy Mountains

Boone
Lincoln
Logan
Mingo
Wayne

West Virginia Regional Travel Impacts, 2018p

	Northern Panhandle	Mid-Ohio Valley	Metro Valley	Mountain Lakes
Total Direct Travel Spending (\$Million)				
Destination Spending	709.3	199.9	702.0	197.3
Other Travel*	6.6	5.3	81.0	2.0
Total Direct Spending	715.9	205.2	783.1	199.3
Visitor Spending by Type of Traveler Accommodation (\$Million)				
Hotel, Motel	137.8	86.3	322.5	88.7
Campground	0.5	1.4	0.8	12.3
Private Home	49.0	59.7	170.4	41.8
Vacation Home	3.6	6.7	5.0	11.2
Day Travel	518.4	45.9	203.3	43.4
Destination Spending	709.3	199.9	702.0	197.3
Visitor Spending by Commodity Purchased (\$Million)				
Accommodations	49.7	28.4	100.1	30.9
Food Service	208.9	44.6	145.5	38.5
Food Stores	37.8	10.7	27.2	12.7
Local Tran. & Gas	76.7	73.0	273.2	75.5
Arts, Ent. & Rec.	21.1	18.3	50.1	17.7
Gaming	223.6	0.0	32.9	0.0
Retail Sales	91.5	24.9	73.0	22.1
Destination Spending	709.3	199.9	702.0	197.3
Industry Earnings Generated by Travel Spending (\$Million)				
Other Travel*	3.4	2.7	11.1	1.0
Arts, Ent. & Rec.	54.9	11.5	38.3	13.5
Accom. & Food Serv.	100.0	25.3	91.2	24.8
Retail**	19.3	8.1	21.0	7.9
Ground Tran.	0.0	0.0	20.1	0.0
Total Direct Earnings	177.7	47.5	181.8	47.2
Industry Employment Generated by Travel Spending (Thousand Jobs)				
Other Travel*	0.0	0.1	0.2	0.0
Arts, Ent. & Rec.	1.6	0.6	1.8	0.6
Accom. & Food Serv.	5.4	1.2	3.5	1.1
Retail**	0.7	0.3	0.7	0.3
Ground Tran.	0.0	0.0	0.5	0.0
Total Direct Employment	7.8	2.1	6.8	2.1
Government Revenue Generated by Travel Spending (\$Million)				
Local Tax Receipts	9.1	2.3	8.4	2.0
State Tax Receipts	111.6	14.1	58.7	13.7
Total Direct Gov't Revenue	120.7	16.4	67.1	15.7

Details may not add to totals due to rounding.

*Other Travel includes air travel and travel agencies. **Retail includes gasoline.

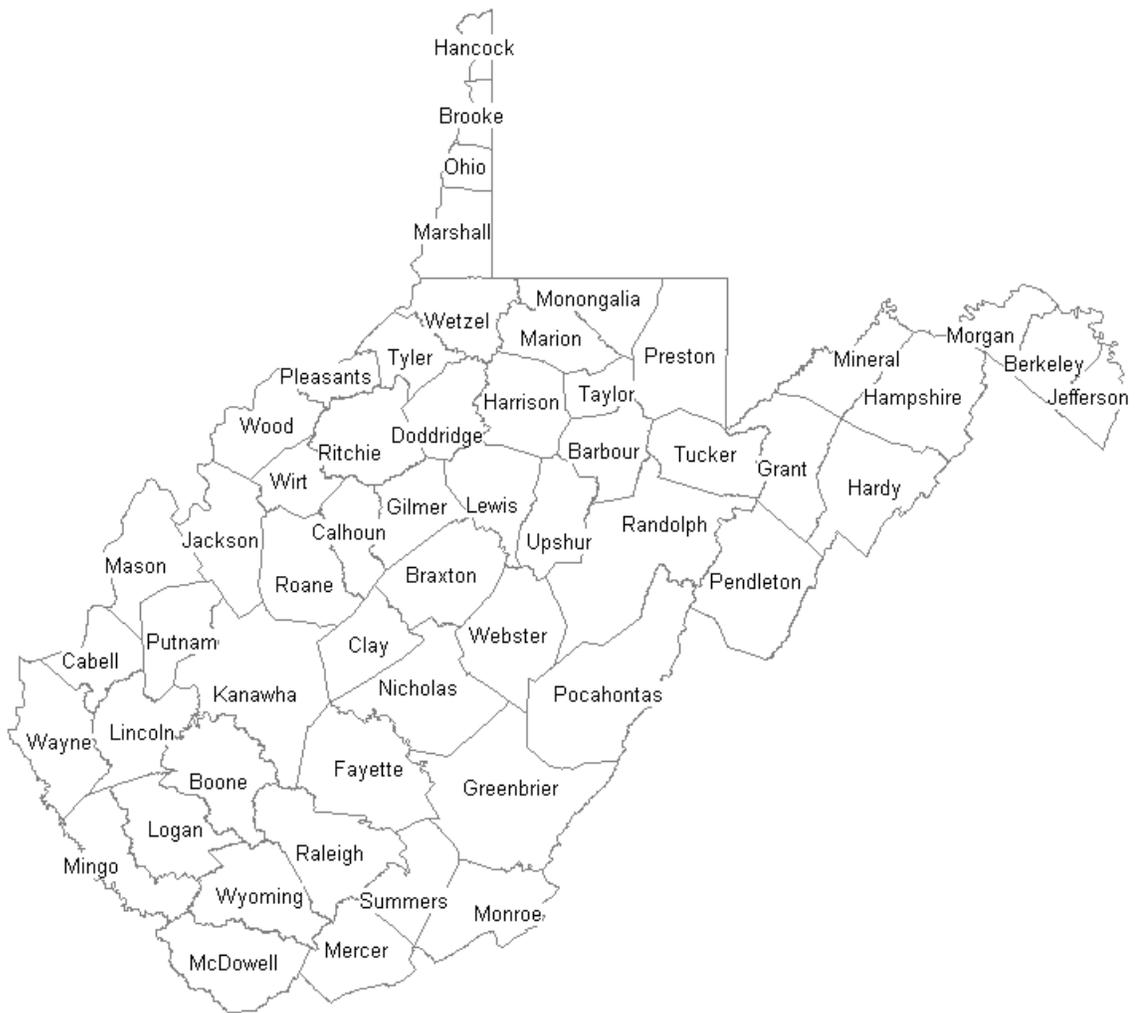
West Virginia Regional Travel Impacts, 2018p

	New River/ Greenbrier	Potomac Highlands	Eastern Panhandle	Mountaineer Country	Hatfield- McCoy Mts.
Total Direct Travel Spending (\$Million)					
Destination Spending	642.0	314.7	1,025.6	479.5	141.7
Other Travel*	10.3	2.8	6.3	8.2	19.1
Total Direct Spending	652.4	317.5	1,031.9	487.7	160.7
Visitor Spending by Type of Traveler Accommodation (\$Million)					
Hotel, Motel	380.4	173.7	182.3	279.2	19.2
Campground	6.9	6.9	0.6	2.6	4.9
Private Home	115.9	44.7	58.8	99.7	73.0
Vacation Home	11.7	30.0	11.0	8.5	2.4
Day Travel	127.1	59.3	772.9	89.5	42.1
Destination Spending	642.0	314.7	1,025.6	479.5	141.7
Visitor Spending by Commodity Purchased (\$Million)					
Accommodations	129.9	70.1	64.6	103.5	5.8
Food Service	146.3	75.3	295.1	123.0	26.2
Food Stores	31.5	28.2	56.2	25.3	6.2
Local Tran. & Gas	168.8	60.8	64.4	114.0	77.3
Arts, Ent. & Rec.	82.4	37.2	31.8	50.3	10.0
Gaming	8.4	0.0	381.2	0.0	0.0
Retail Sales	74.7	43.1	132.2	63.4	16.3
Destination Spending	642.0	314.7	1,025.6	479.5	141.7
Industry Earnings Generated by Travel Spending (\$Million)					
Other Travel*	5.4	1.5	3.3	3.2	3.0
Arts, Ent. & Rec.	67.4	22.0	91.0	37.5	4.9
Accom. & Food Serv.	118.8	48.8	139.5	87.0	11.7
Retail**	21.4	13.8	26.2	16.9	6.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0
Total Direct Earnings	212.9	86.2	260.0	144.7	25.9
Industry Employment Generated by Travel Spending (Thousand Jobs)					
Other Travel*	0.1	0.0	0.1	0.1	0.1
Arts, Ent. & Rec.	2.1	1.2	2.9	1.3	0.3
Accom. & Food Serv.	4.1	2.3	5.3	3.4	0.6
Retail**	0.7	0.5	0.9	0.6	0.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0
Total Direct Employment	7.0	4.1	9.1	5.3	1.2
Government Revenue Generated by Travel Spending (\$Million)					
Local Tax Receipts	7.2	4.3	12.5	6.7	0.8
State Tax Receipts	47.1	20.1	172.8	32.6	10.5
Total Direct Gov't Revenue	54.3	24.4	185.3	39.3	11.3

Details may not add to totals due to rounding.

*Other Travel includes air travel and travel agencies. **Retail includes gasoline.

V. COUNTY TRAVEL IMPACTS 2008-2018p



The analysis of travel impacts at the county level provides a valuable overview of how the economic benefits of travel and tourism are distributed throughout the state.

Travel impacts, in absolute terms, are highest in the state's Eastern Panhandle (Berkeley, Jefferson, and Morgan counties), just a short distance from Washington D.C. and Baltimore. The area offers visitors a variety of historic sites and attractions, including Harpers Ferry National Historic Park, Berkeley Springs State Park, and Hollywood Casino at Charles Town Races. It is also notable that the size of the travel industry in relation to the total economy of a locale is quite significant in a number of smaller communities and rural areas of the state, which tend to be more orientated to scenic and outdoor recreational opportunities. For example, in the counties of Greenbrier, Tucker, and Pocahontas the travel industry is an extremely significant component of the total local economy as measured by the proportion of travel-generated employment and earnings.

Day travelers are particularly notable for some areas. Day visitors are most significant in the counties of Hancock, Ohio, and Jefferson where the racetracks lie within close proximity to major population centers in Pennsylvania, Maryland, and Washington D.C. Shopping destination areas also receive a higher proportion of day visitation, and visitors tend to spend a higher proportion of their total spending on retail expenditures.

Travel Generated Earnings

The significance of the visitor impact to local economies can be very substantial in some of the state's destination areas. A useful measure of the relative significance of the visitor impact in each area is travel-generated earnings in relation to total earnings (See the table on pages 43-44). A high percentage of travel-generated earnings indicate a relatively high reliance on income generated from visitor spending.

West Virginia County Travel Impacts, 2008-2018p

Barbour	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	16.0	15.4	17.2	16.5	14.4	13.8	14.4	15.0
Earnings (\$Million)	2.1	2.5	2.5	2.6	2.7	2.8	2.7	2.7
Employment (Jobs)	140	150	150	160	170	160	160	150
Local Govt. Revenue (\$000)	86	123	182	129	125	117	105	95
State Govt. Revenue (\$000)	987	1,030	1,019	1,007	989	958	980	1,008
Berkeley	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	139.3	122.5	130.3	123.3	112.1	108.5	139.2	155.7
Earnings (\$Million)	27.6	26.6	25.5	25.8	26.7	27.3	33.8	35.3
Employment (Jobs)	1,350	1,240	1,180	1,210	1,240	1,250	1,510	1,530
Local Govt. Revenue (\$000)	973	888	923	815	936	871	1,421	1,646
State Govt. Revenue (\$000)	8,825	8,272	7,991	7,741	7,717	7,522	9,290	10,264
Boone	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	33.5	29.5	33.6	31.4	24.9	23.3	24.8	25.6
Earnings (\$Million)	2.9	3.0	3.0	3.1	3.0	3.2	3.1	3.0
Employment (Jobs)	170	160	160	160	150	160	150	140
Local Govt. Revenue (\$000)	79	109	172	110	104	97	83	82
State Govt. Revenue (\$000)	2,125	2,102	2,055	2,053	1,969	1,880	1,938	1,960
Braxton	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	36.9	36.7	40.0	37.6	31.1	30.6	31.7	35.9
Earnings (\$Million)	6.5	8.3	7.9	8.0	7.4	8.0	7.7	8.6
Employment (Jobs)	330	370	330	330	280	300	300	320
Local Govt. Revenue (\$000)	161	220	391	315	282	285	258	302
State Govt. Revenue (\$000)	2,301	2,487	2,406	2,325	2,170	2,152	2,183	2,453
Brooke	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	18.4	16.1	17.8	17.1	14.9	14.3	14.8	15.1
Earnings (\$Million)	4.7	4.7	4.5	4.9	4.9	5.0	4.9	5.2
Employment (Jobs)	210	200	180	190	180	170	170	180
Local Govt. Revenue (\$000)	93	134	205	137	149	140	125	124
State Govt. Revenue (\$000)	1,153	1,089	1,074	1,074	1,050	1,016	1,037	1,059
Cabell	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	126.1	133.9	143.2	136.2	125.6	119.8	115.2	117.7
Earnings (\$Million)	26.6	34.2	33.0	33.6	34.9	34.8	33.4	33.8
Employment (Jobs)	1,300	1,540	1,470	1,500	1,480	1,450	1,420	1,420
Local Govt. Revenue (\$000)	1,052	1,354	1,819	1,736	1,802	1,681	1,436	1,438
State Govt. Revenue (\$000)	8,035	9,070	8,894	8,677	8,689	8,357	8,061	8,187
Calhoun	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	7.5	6.8	7.5	7.2	6.2	5.9	6.2	6.4
Earnings (\$Million)	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.2
Employment (Jobs)	70	80	80	80	80	80	80	80
Local Govt. Revenue (\$000)	46	68	107	69	65	61	52	51
State Govt. Revenue (\$000)	454	454	440	433	421	407	418	424
Clay	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	8.7	7.7	8.8	8.2	6.4	6.0	6.4	6.7
Earnings (\$Million)	0.7	0.7	0.7	0.8	0.7	0.8	0.8	0.7
Employment (Jobs)	40	40	40	40	40	40	40	40
Local Govt. Revenue (\$000)	49	71	110	72	68	63	55	54
State Govt. Revenue (\$000)	553	553	539	537	515	490	509	519

West Virginia County Travel Impacts, 2008-2018p

Doddridge	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	6.4	6.1	6.7	6.6	6.1	5.9	6.2	6.2
Earnings (\$Million)	1.1	1.2	1.2	1.3	1.4	1.4	1.4	1.4
Employment (Jobs)	50	50	50	50	50	50	50	50
Local Govt. Revenue (\$000)	49	71	110	72	68	64	55	54
State Govt. Revenue (\$000)	383	392	381	377	377	367	380	381
Fayette	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	70.7	67.3	79.9	75.5	65.5	65.0	69.5	70.4
Earnings (\$Million)	12.3	13.5	15.8	16.1	17.1	18.2	18.8	19.0
Employment (Jobs)	720	740	810	790	770	790	780	780
Local Govt. Revenue (\$000)	553	621	848	739	701	704	716	715
State Govt. Revenue (\$000)	4,474	4,587	4,936	4,810	4,675	4,668	4,904	4,933
Gilmer	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	8.2	7.8	8.6	8.3	7.3	7.0	7.2	7.5
Earnings (\$Million)	1.2	1.3	1.3	1.4	1.4	1.4	1.4	1.4
Employment (Jobs)	90	90	80	80	80	70	70	70
Local Govt. Revenue (\$000)	62	89	136	91	86	80	70	69
State Govt. Revenue (\$000)	494	504	490	477	465	450	459	472
Grant	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	17.2	15.8	17.7	16.9	14.4	13.7	14.4	15.0
Earnings (\$Million)	2.0	2.2	2.2	2.4	2.4	2.5	2.5	2.5
Employment (Jobs)	140	150	140	150	150	140	140	140
Local Govt. Revenue (\$000)	65	91	139	94	90	84	73	73
State Govt. Revenue (\$000)	1,060	1,071	1,041	1,027	1,003	968	998	1,020
Greenbrier	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	215.5	182.9	238.6	225.5	215.3	199.4	211.2	227.5
Earnings (\$Million)	87.5	79.7	100.2	100.0	101.8	97.1	101.0	106.9
Employment (Jobs)	2,490	2,020	2,450	2,350	2,290	2,270	2,450	2,530
Local Govt. Revenue (\$000)	1,671	1,621	2,392	2,262	2,217	2,028	2,130	2,317
State Govt. Revenue (\$000)	14,297	13,952	18,148	16,935	16,673	15,412	16,200	17,798
Hampshire	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	35.9	35.5	37.4	35.9	32.4	31.3	32.5	33.6
Earnings (\$Million)	5.6	6.8	6.3	6.6	6.8	7.0	7.0	7.0
Employment (Jobs)	390	400	370	380	370	380	360	350
Local Govt. Revenue (\$000)	104	135	174	127	140	131	118	164
State Govt. Revenue (\$000)	2,180	2,323	2,159	2,085	2,081	2,025	2,076	2,126
Hancock	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	426.6	369.2	381.6	336.0	343.7	303.8	303.5	285.4
Earnings (\$Million)	88.8	83.8	83.2	77.5	83.9	75.8	75.1	70.3
Employment (Jobs)	4,620	4,510	4,400	4,330	4,570	4,130	3,980	3,780
Local Govt. Revenue (\$000)	6,122	5,185	5,100	4,401	4,600	4,024	3,751	3,628
State Govt. Revenue (\$000)	93,210	75,689	74,557	66,532	62,607	56,189	53,088	50,603
Hardy	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	21.2	23.4	22.3	23.4	22.9	22.4	23.5	26.5
Earnings (\$Million)	3.6	4.9	3.9	4.7	5.2	5.4	5.4	6.1
Employment (Jobs)	260	320	250	310	320	320	310	320
Local Govt. Revenue (\$000)	106	161	233	231	261	250	246	289
State Govt. Revenue (\$000)	1,293	1,514	1,293	1,369	1,442	1,421	1,473	1,665

West Virginia County Travel Impacts, 2008-2018p

Harrison	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	102.4	115.7	141.9	149.4	138.2	118.1	121.1	151.8
Earnings (\$Million)	23.6	31.7	37.8	43.2	45.0	41.3	40.9	45.7
Employment (Jobs)	1,120	1,390	1,550	1,730	1,680	1,520	1,500	1,610
Local Govt. Revenue (\$000)	1,002	1,388	1,964	2,157	2,429	1,915	1,869	2,438
State Govt. Revenue (\$000)	6,402	7,600	8,758	9,304	9,147	8,005	8,152	10,016
Jackson	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	43.9	40.4	46.0	44.4	36.9	37.3	39.7	41.1
Earnings (\$Million)	6.5	6.8	7.2	7.6	7.2	8.0	8.2	8.3
Employment (Jobs)	400	390	410	450	390	410	430	430
Local Govt. Revenue (\$000)	255	273	362	332	294	317	318	325
State Govt. Revenue (\$000)	2,792	2,794	2,836	2,847	2,685	2,721	2,841	2,905
Jefferson	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	731.4	769.7	818.6	756.3	769.5	805.0	796.4	842.6
Earnings (\$Million)	151.5	172.7	175.8	181.0	188.3	205.7	202.6	213.7
Employment (Jobs)	6,970	7,180	7,010	7,440	6,660	7,160	6,930	7,040
Local Govt. Revenue (\$000)	8,626	10,838	15,953	11,047	11,506	11,354	10,345	10,515
State Govt. Revenue (\$000)	194,932	198,678	204,246	164,735	171,889	172,780	159,485	160,398
Kanawha	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	589.8	586.4	642.6	561.9	571.7	565.5	571.2	580.2
Earnings (\$Million)	116.7	129.2	131.7	117.6	128.2	131.7	129.9	133.2
Employment (Jobs)	5,100	5,280	5,220	4,510	4,730	4,940	4,880	4,740
Local Govt. Revenue (\$000)	4,669	5,194	5,947	5,011	6,873	6,938	6,660	6,748
State Govt. Revenue (\$000)	44,004	43,881	45,768	39,688	42,952	43,602	43,330	44,304
Lewis	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	42.1	42.4	47.2	50.0	41.8	43.5	39.5	48.3
Earnings (\$Million)	10.4	11.8	12.3	14.3	13.4	13.7	12.5	13.7
Employment (Jobs)	500	520	550	610	560	570	520	550
Local Govt. Revenue (\$000)	549	600	723	784	669	698	569	709
State Govt. Revenue (\$000)	2,700	2,844	2,957	3,180	2,845	2,936	2,684	3,214
Lincoln	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	17.5	16.2	18.1	17.3	14.6	13.9	14.5	15.1
Earnings (\$Million)	2.1	2.3	2.3	2.5	2.5	2.6	2.5	2.6
Employment (Jobs)	140	150	140	140	140	130	130	120
Local Govt. Revenue (\$000)	54	81	128	82	77	72	62	61
State Govt. Revenue (\$000)	1,090	1,106	1,087	1,087	1,053	1,020	1,043	1,070
Logan	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	51.8	52.6	63.5	54.2	48.3	45.3	47.4	52.3
Earnings (\$Million)	5.0	7.7	9.1	7.5	8.0	8.1	8.0	8.5
Employment (Jobs)	240	350	410	330	340	340	320	340
Local Govt. Revenue (\$000)	135	269	450	260	337	307	282	306
State Govt. Revenue (\$000)	3,282	3,697	3,926	3,530	3,622	3,451	3,532	3,834
Marion	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	55.6	67.8	83.7	80.0	74.0	70.7	68.3	77.1
Earnings (\$Million)	9.6	16.8	20.2	20.8	21.5	21.4	20.2	21.4
Employment (Jobs)	540	810	970	1,010	1,010	960	880	910
Local Govt. Revenue (\$000)	310	446	1,038	928	1,093	1,019	880	1,001
State Govt. Revenue (\$000)	3,494	4,593	5,191	5,080	5,076	4,890	4,713	5,247

West Virginia County Travel Impacts, 2008-2018p

Marshall	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	28.0	26.1	29.1	34.8	30.2	28.3	30.3	31.3
Earnings (\$Million)	5.9	6.9	6.8	11.0	11.0	10.8	11.2	11.3
Employment (Jobs)	260	260	270	440	410	390	380	360
Local Govt. Revenue (\$000)	89	132	208	292	316	283	289	297
State Govt. Revenue (\$000)	1,739	1,769	1,743	2,177	2,100	1,992	2,097	2,143
Mason	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	23.4	21.8	24.2	23.3	20.1	19.3	20.3	20.9
Earnings (\$Million)	3.4	3.8	3.8	4.0	4.1	4.2	4.2	4.2
Employment (Jobs)	240	230	230	250	240	230	230	230
Local Govt. Revenue (\$000)	100	146	224	149	141	132	114	113
State Govt. Revenue (\$000)	1,450	1,472	1,443	1,434	1,402	1,360	1,400	1,429
McDowell	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	26.9	24.4	27.2	25.5	20.7	19.5	20.4	21.1
Earnings (\$Million)	2.8	3.0	2.9	3.1	3.0	3.1	3.0	2.9
Employment (Jobs)	180	180	170	170	160	150	150	140
Local Govt. Revenue (\$000)	130	195	304	197	186	174	149	147
State Govt. Revenue (\$000)	1,693	1,704	1,657	1,644	1,579	1,509	1,544	1,567
Mercer	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	110.9	92.0	101.2	111.5	97.4	93.8	106.4	111.3
Earnings (\$Million)	20.9	18.0	17.8	23.9	23.5	24.0	26.4	27.3
Employment (Jobs)	1,140	940	880	1,110	1,100	1,100	1,180	1,200
Local Govt. Revenue (\$000)	863	646	760	1,022	1,122	1,072	1,245	1,302
State Govt. Revenue (\$000)	7,077	6,336	6,247	7,157	6,916	6,724	7,421	7,699
Mineral	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	21.3	20.5	22.4	22.0	19.9	19.6	20.0	21.1
Earnings (\$Million)	3.7	4.1	4.1	4.4	4.5	4.7	4.6	4.8
Employment (Jobs)	260	250	250	260	260	260	260	270
Local Govt. Revenue (\$000)	120	160	276	216	208	201	179	185
State Govt. Revenue (\$000)	1,311	1,345	1,337	1,335	1,311	1,302	1,315	1,382
Mingo	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	28.3	28.2	29.3	24.2	20.9	19.8	20.6	20.7
Earnings (\$Million)	4.0	4.3	4.4	3.9	3.9	3.9	3.8	4.1
Employment (Jobs)	240	250	240	210	210	210	200	210
Local Govt. Revenue (\$000)	117	123	234	168	163	152	137	133
State Govt. Revenue (\$000)	1,784	1,967	1,792	1,542	1,526	1,465	1,494	1,495
Monongalia	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	129.5	129.8	184.7	170.2	172.1	170.2	170.3	192.7
Earnings (\$Million)	31.5	36.4	52.6	51.0	56.8	58.7	57.9	62.5
Employment (Jobs)	1,500	1,570	2,220	2,030	2,170	2,170	2,060	2,080
Local Govt. Revenue (\$000)	1,165	1,490	2,570	2,346	2,647	2,571	2,414	2,757
State Govt. Revenue (\$000)	8,289	8,770	11,618	10,863	11,588	11,520	11,475	12,847
Monroe	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	9.9	9.7	10.4	10.4	9.8	9.6	9.8	9.9
Earnings (\$Million)	2.1	2.3	2.3	2.5	2.5	2.6	2.6	2.5
Employment (Jobs)	130	130	160	170	170	170	170	160
Local Govt. Revenue (\$000)	55	82	129	83	78	73	62	62
State Govt. Revenue (\$000)	574	592	571	553	548	541	552	553

West Virginia County Travel Impacts, 2008-2018p

Morgan	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	31.6	27.7	30.0	29.2	28.0	28.7	30.8	33.5
Earnings (\$Million)	8.7	8.3	8.2	8.6	8.3	9.8	10.3	11.0
Employment (Jobs)	450	440	450	480	470	520	560	560
Local Govt. Revenue (\$000)	186	182	274	232	244	250	253	360
State Govt. Revenue (\$000)	1,976	1,818	1,793	1,755	1,771	1,853	1,968	2,136
Nicholas	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	62.2	60.5	66.9	61.9	52.6	49.7	54.0	59.5
Earnings (\$Million)	8.9	10.4	10.6	10.4	10.2	10.2	10.9	11.8
Employment (Jobs)	570	650	610	600	560	550	560	600
Local Govt. Revenue (\$000)	445	529	612	512	483	444	463	518
State Govt. Revenue (\$000)	3,935	4,148	4,103	3,937	3,774	3,611	3,837	4,182
Ohio	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	377.4	362.7	431.4	357.4	323.6	287.0	318.2	333.7
Earnings (\$Million)	70.5	77.2	93.1	81.6	75.5	68.7	75.2	79.6
Employment (Jobs)	3,250	3,420	3,880	3,360	2,960	2,640	2,810	2,870
Local Govt. Revenue (\$000)	5,011	4,326	4,127	3,934	4,249	3,887	4,174	4,299
State Govt. Revenue (\$000)	75,162	64,667	59,357	48,060	51,224	49,914	53,811	54,477
Pendleton	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	9.0	8.3	9.3	8.7	7.9	7.7	8.5	8.7
Earnings (\$Million)	1.9	2.0	2.0	2.0	2.1	2.2	2.4	2.4
Employment (Jobs)	140	120	110	110	120	130	130	140
Local Govt. Revenue (\$000)	98	114	159	116	118	114	114	110
State Govt. Revenue (\$000)	553	550	543	510	514	505	544	548
Pleasants	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	7.0	6.4	7.2	6.9	5.9	5.6	5.9	6.1
Earnings (\$Million)	0.8	0.9	0.9	1.0	1.0	1.0	1.0	1.0
Employment (Jobs)	60	60	60	60	60	60	60	50
Local Govt. Revenue (\$000)	60	86	134	88	83	78	67	67
State Govt. Revenue (\$000)	437	439	432	434	423	409	420	430
Pocahontas	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	101.9	86.1	80.0	88.6	80.2	87.4	92.9	111.7
Earnings (\$Million)	28.6	25.3	21.9	26.0	24.3	25.4	27.1	30.5
Employment (Jobs)	1,350	1,230	1,060	1,110	950	1,100	1,130	1,300
Local Govt. Revenue (\$000)	1,740	1,433	1,373	1,569	1,441	1,562	1,606	1,994
State Govt. Revenue (\$000)	6,511	5,604	4,929	5,425	5,005	5,409	5,752	6,876
Preston	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	33.4	32.5	36.6	34.2	29.8	31.4	29.6	32.4
Earnings (\$Million)	5.3	6.3	6.5	6.5	6.8	7.7	6.9	7.6
Employment (Jobs)	330	350	360	350	340	370	320	350
Local Govt. Revenue (\$000)	164	290	418	297	291	262	244	235
State Govt. Revenue (\$000)	2,079	2,203	2,206	2,126	2,092	2,234	2,060	2,244
Putnam	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	74.3	66.3	74.7	70.5	57.7	54.8	58.2	64.2
Earnings (\$Million)	8.7	9.1	8.9	9.4	9.5	10.0	10.0	10.6
Employment (Jobs)	450	450	430	430	430	430	420	440
Local Govt. Revenue (\$000)	142	168	240	159	155	142	123	125
State Govt. Revenue (\$000)	4,719	4,687	4,574	4,581	4,444	4,285	4,429	4,793

West Virginia County Travel Impacts, 2008-2018p

Raleigh	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	185.9	158.9	179.8	171.1	150.9	156.7	157.5	164.0
Earnings (\$Million)	43.2	38.8	41.3	42.1	40.4	43.1	42.4	44.8
Employment (Jobs)	2,180	1,850	1,860	1,900	1,740	1,800	1,730	1,760
Local Govt. Revenue (\$000)	1,792	1,783	2,154	2,078	2,152	2,297	2,163	2,237
State Govt. Revenue (\$000)	11,945	10,756	11,267	10,951	10,401	10,758	10,748	11,170
Randolph	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	44.6	45.6	48.1	49.9	46.3	47.1	44.9	54.5
Earnings (\$Million)	10.9	13.3	12.6	14.5	15.0	15.7	14.9	16.7
Employment (Jobs)	630	680	650	730	750	760	710	760
Local Govt. Revenue (\$000)	387	496	585	581	592	606	500	635
State Govt. Revenue (\$000)	2,795	3,034	2,920	3,079	3,081	3,130	2,987	3,577
Ritchie	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	6.3	6.5	6.2	5.9	5.2	6.6	7.6	7.8
Earnings (\$Million)	1.5	1.9	1.4	1.5	1.5	2.4	2.8	2.8
Employment (Jobs)	100	120	90	90	90	140	150	140
Local Govt. Revenue (\$000)	115	172	234	159	156	185	185	186
State Govt. Revenue (\$000)	381	422	356	348	336	430	491	501
Roane	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	13.8	12.9	14.2	13.7	11.9	11.4	11.8	12.1
Earnings (\$Million)	1.9	2.1	2.1	2.2	2.2	2.3	2.2	2.2
Employment (Jobs)	130	130	120	130	120	120	120	120
Local Govt. Revenue (\$000)	64	91	139	93	88	82	72	71
State Govt. Revenue (\$000)	853	864	843	833	813	786	806	818
Summers	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	20.9	19.0	20.5	18.8	17.0	16.6	17.4	19.6
Earnings (\$Million)	4.7	4.7	4.7	4.4	4.4	4.6	4.6	5.1
Employment (Jobs)	310	320	300	260	240	250	230	250
Local Govt. Revenue (\$000)	251	245	284	242	238	230	223	252
State Govt. Revenue (\$000)	1,307	1,253	1,228	1,136	1,111	1,095	1,133	1,269
Taylor	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	12.1	12.3	13.8	12.3	10.4	11.1	11.5	12.5
Earnings (\$Million)	2.3	2.9	3.0	2.8	2.6	3.1	3.1	3.3
Employment (Jobs)	150	150	160	140	130	140	140	150
Local Govt. Revenue (\$000)	83	117	171	107	109	117	106	111
State Govt. Revenue (\$000)	747	813	831	751	699	751	767	825
Tucker	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	43.0	40.2	41.0	44.2	44.8	44.7	46.0	46.4
Earnings (\$Million)	12.8	13.0	12.3	14.4	15.4	16.0	16.2	16.2
Employment (Jobs)	710	680	660	770	770	810	790	790
Local Govt. Revenue (\$000)	687	690	763	796	861	838	841	849
State Govt. Revenue (\$000)	2,729	2,624	2,525	2,722	2,850	2,859	2,925	2,948
Tyler	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	6.3	5.8	6.4	6.2	5.5	5.2	5.5	5.7
Earnings (\$Million)	1.2	1.3	1.3	1.4	1.4	1.5	1.5	1.5
Employment (Jobs)	80	80	90	80	80	80	80	80
Local Govt. Revenue (\$000)	81	112	168	116	115	107	95	95
State Govt. Revenue (\$000)	393	393	387	388	382	368	380	387

West Virginia County Travel Impacts, 2008-2018p

Upshur	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	30.3	27.2	34.0	33.5	30.6	29.3	25.8	33.1
Earnings (\$Million)	7.0	7.2	8.8	9.5	9.8	9.8	8.5	9.9
Employment (Jobs)	370	330	420	440	460	430	370	420
Local Govt. Revenue (\$000)	176	187	319	297	305	282	177	269
State Govt. Revenue (\$000)	1,893	1,824	2,054	2,063	2,055	1,983	1,767	2,223
Wayne	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	49.8	49.6	55.0	50.9	45.6	42.4	45.4	47.0
Earnings (\$Million)	6.7	7.3	7.2	8.6	8.3	7.7	7.6	7.6
Employment (Jobs)	370	370	350	370	360	370	370	380
Local Govt. Revenue (\$000)	150	207	292	272	266	264	220	210
State Govt. Revenue (\$000)	2,190	2,225	2,178	2,132	2,078	2,014	2,065	2,115
Webster	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	10.0	9.1	10.3	9.7	8.1	7.6	8.0	8.5
Earnings (\$Million)	1.0	1.1	1.1	1.1	1.1	1.2	1.2	1.1
Employment (Jobs)	80	80	70	80	70	80	70	70
Local Govt. Revenue (\$000)	74	106	161	108	103	96	84	84
State Govt. Revenue (\$000)	623	628	610	605	586	560	578	595
Wetzel	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	22.3	24.5	27.3	26.0	26.5	28.4	37.8	44.8
Earnings (\$Million)	3.3	4.7	4.8	5.0	6.1	7.1	9.0	9.8
Employment (Jobs)	220	280	270	280	310	370	470	480
Local Govt. Revenue (\$000)	141	292	387	321	391	430	586	704
State Govt. Revenue (\$000)	1,400	1,658	1,675	1,641	1,828	1,955	2,507	2,926
Wirt	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	1.3	1.3	1.4	1.4	1.4	1.4	1.4	1.5
Earnings (\$Million)	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5
Employment (Jobs)	20	30	30	30	30	30	30	30
Local Govt. Revenue (\$000)	46	68	107	68	64	60	51	51
State Govt. Revenue (\$000)	70	73	70	65	66	66	67	68
Wood	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	118.7	107.8	123.6	128.9	111.7	104.7	114.1	130.1
Earnings (\$Million)	22.5	22.9	24.5	29.3	28.2	27.7	29.4	31.5
Employment (Jobs)	1,150	1,090	1,120	1,260	1,170	1,110	1,170	1,210
Local Govt. Revenue (\$000)	731	715	957	1,141	1,335	1,196	1,302	1,551
State Govt. Revenue (\$000)	7,553	7,390	7,643	8,247	7,864	7,452	7,962	8,939
Wyoming	2008	2010	2012	2014	2015	2016	2017	2018
Direct Spending (\$Million)	36.5	32.9	36.5	33.7	27.4	25.7	27.2	28.7
Earnings (\$Million)	4.2	4.6	4.4	4.4	4.3	4.5	4.4	4.4
Employment (Jobs)	220	210	200	190	180	180	160	170
Local Govt. Revenue (\$000)	100	129	209	146	143	133	120	123
State Govt. Revenue (\$000)	2,313	2,316	2,234	2,194	2,117	2,023	2,081	2,153

Total Overnight Visitor Volume by County, 2018p

	Person		Party	
	Nights	Trips	Nights	Trips
Mineral	356.7	142.7	167.2	67.2
Mingo	263.4	106.3	124.4	50.3
Monongalia	1,767.4	849.1	857.3	414.4
Monroe	285.6	101.3	128.9	46.0
Barbour	237.9	91.3	110.2	42.5
Berkeley	1,831.1	786.3	866.7	375.5
Boone	230.1	91.1	108.4	43.0
Braxton	400.4	159.7	185.4	74.8
Brooke	234.2	94.3	110.7	44.6
Cabell	1,212.4	540.1	581.4	260.4
Calhoun	117.3	42.6	53.4	19.5
Doddridge	146.6	52.4	66.3	23.9
Fayette	719.2	313.0	342.1	150.0
Gilmer	142.8	51.5	64.6	23.5
Grant	237.8	86.3	107.9	39.4
Greenbrier	1,591.7	798.2	775.1	391.7
Hampshire	637.3	223.9	285.1	101.1
Hancock	503.8	232.0	243.0	112.5
Hardy	431.9	166.4	197.3	77.1
Harrison	1,383.0	657.4	669.9	320.4
Jackson	410.7	174.6	194.6	83.3
Jefferson	1,214.0	571.1	585.4	277.5
Kanawha	3,282.9	1,542.9	1,588.3	750.7
Lewis	434.3	205.7	209.3	100.0
Lincoln	224.9	87.7	105.3	41.2
Logan	426.4	180.2	202.6	86.0
McDowell	232.6	92.2	109.5	43.4
Pleasants	87.3	34.1	40.7	16.0
Pocahontas	1,204.1	550.4	568.7	264.5
Preston	467.0	183.4	217.2	85.9
Putnam	632.1	250.1	297.5	117.9
Raleigh	1,482.3	693.3	715.3	336.8
Randolph	653.2	273.0	305.5	129.2
Ritchie	107.1	43.2	49.6	20.3
Roane	206.9	78.4	95.4	36.4
Summers	226.0	94.8	105.5	44.8
Taylor	207.4	82.9	97.3	39.1
Tucker	512.2	229.7	241.3	110.0
Tyler	68.9	27.4	31.8	12.8
Upshur	446.8	177.7	207.1	83.2
Wayne	492.2	191.2	230.1	89.5
Webster	90.6	33.9	41.3	15.6
Wetzel	421.7	198.0	202.7	96.1
Marion	852.1	375.3	407.4	180.5
Marshall	431.9	175.3	202.8	82.8
Mason	345.5	132.6	160.4	61.8
Mercer	1,039.9	467.9	498.4	225.8
Morgan	492.1	196.7	227.1	92.1
Nicholas	564.7	240.4	266.7	114.5
Ohio	844.2	406.5	410.2	198.6
Pendleton	127.4	48.8	58.2	22.6
Wood	1,290.9	572.2	617.6	275.4
Wyoming	258.7	105.4	122.4	50.0

*Some counties are not available due to the reliability of rural estimates. The sum of the counties will be greater than the state or tourism regions. This is due to visitors who visit multiple locations on a single trip.

**Total Employment and Earnings Compared to
Direct Travel-Generated Employment and Earnings by County, 2018p**

County	Employment			Earnings (\$Millions)		
	Total	Travel	Percent	Total	Travel	Percent
Barbour	5,530	154	2.8%	220.3	2.7	1.2%
Berkeley	48,840	1,532	3.1%	2,372.1	35.3	1.5%
Boone	6,070	143	2.3%	366.1	3.0	0.8%
Braxton	5,030	321	6.4%	208.2	8.6	4.1%
Brooke	10,020	182	1.8%	485.0	5.2	1.1%
Cabell	64,250	1,418	2.2%	3,198.7	33.8	1.1%
Calhoun	3,400	81	2.4%	76.6	1.2	1.6%
Clay	1,960	41	2.1%	64.6	0.7	1.2%
Doddridge	2,970	47	1.6%	144.4	1.4	1.0%
Fayette	13,870	783	5.6%	604.4	19.0	3.1%
Gilmer	3,200	74	2.3%	113.8	1.4	1.2%
Grant	5,220	139	2.7%	216.9	2.5	1.1%
Greenbrier	18,590	2,525	13.6%	752.6	106.9	14.2%
Hampshire	7,160	353	4.9%	219.2	7.0	3.2%
Hancock	12,300	3,780	30.7%	603.2	70.3	11.7%
Hardy	7,990	319	4.0%	276.1	6.1	2.2%
Harrison	48,720	1,613	3.3%	2,866.1	45.7	1.6%
Jackson	17,510	428	2.4%	1,255.0	8.3	0.7%
Jefferson	24,320	7,038	28.9%	1,131.2	213.7	18.9%
Kanawha	124,590	4,741	3.8%	7,159.8	133.2	1.9%
Lewis	9,080	551	6.1%	479.5	13.7	2.9%
Lincoln	3,560	122	3.4%	131.4	2.6	2.0%
Logan	12,020	339	2.8%	587.9	8.5	1.4%
McDowell	5,250	143	2.7%	287.2	2.9	1.0%
Marion	24,770	907	3.7%	1,177.3	21.4	1.8%
Marshall	16,970	362	2.1%	1,396.3	11.3	0.8%
Mason	8,140	227	2.8%	368.2	4.2	1.1%
Mercer	25,880	1,197	4.6%	1,135.7	27.3	2.4%
Mineral	11,020	266	2.4%	487.6	4.8	1.0%

**Total Employment and Earnings Compared to
Direct Travel-Generated Employment and Earnings by County, 2018p**

County	Employment			Earnings (\$Millions)		
	Total	Travel	Percent	Total	Travel	Percent
Mingo	7.450	211	2.8%	387.9	4.1	1.1%
Monongalia	74.200	2.084	2.8%	4.241.1	62.5	1.5%
Monroe	3.880	164	4.2%	127.7	2.5	2.0%
Morgan	5.030	563	11.2%	168.6	11.0	6.5%
Nicholas	9.680	598	6.2%	403.0	11.8	2.9%
Ohio	35.760	2.873	8.0%	2.170.3	79.6	3.7%
Pendleton	2.930	141	4.8%	74.0	2.4	3.2%
Pleasants	3.410	53	1.6%	200.6	1.0	0.5%
Pocahontas	4.730	1.298	27.4%	161.8	30.5	18.9%
Preston	11.700	348	3.0%	480.6	7.6	1.6%
Putnam	28.490	436	1.5%	1.685.9	10.6	0.6%
Raleigh	39.860	1.761	4.4%	1.922.7	44.8	2.3%
Randolph	14.820	764	5.2%	615.6	16.7	2.7%
Ritchie	5.320	139	2.6%	214.5	2.8	1.3%
Roane	5.950	116	2.0%	174.3	2.2	1.3%
Summers	3.420	254	7.4%	123.7	5.1	4.1%
Taylor	4.950	147	3.0%	215.6	3.3	1.5%
Tucker	3.630	789	21.7%	147.3	16.2	11.0%
Tyler	3.210	76	2.4%	144.0	1.5	1.0%
Upshur	10.840	418	3.9%	453.4	9.9	2.2%
Wayne	11.220	376	3.3%	596.7	7.6	1.3%
Webster	2.230	73	3.3%	86.6	1.1	1.3%
Wetzel	5.740	479	8.3%	236.0	9.8	4.1%
Wirt	1.280	28	2.2%	34.6	0.5	1.4%
Wood	45.820	1.214	2.7%	2.211.1	31.5	1.4%
Wyoming	5.690	169	3.0%	277.1	4.4	1.6%

Appendices

Appendix A. Regional Travel Impact Model (RTIM) Methodology

Appendix B. Definition of Terms

Appendix C. Travel Industry Business Classifications

Travel Impact Estimation Procedures

Travel Spending

Hotel, Motel, B&B. Spending on commercial accommodations by hotel and motel guests is estimated from hotel/motel occupancy tax receipts for each jurisdiction and county. Where room tax receipts are unavailable or incomplete, room sales are estimated from lodging inventories, occupancy rates, and room rates. Other lodging industry data, such as sales tax receipts, employment and earnings, are also used to estimate and/or validate room sales. Spending by hotel and motel guests in other business categories, such as food and transportation, is estimated using spending distributions reported in visitor survey data. The spending distribution shows how travelers divide their spending between lodging and other purchases.

Private Campground. Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites, and the average daily expenditures of visitor camp parties reported in survey data. Spending in other business categories is estimated in the same way as for hotel/motel guests.

Public Campground. Spending by campers using public campgrounds is estimated from visitor counts at federally, state, and locally managed campsites and recreation areas, and daily spending estimates from visitor survey data.

Private Home. Spending by private home guests is determined from census data and visitor survey data. The number of owner occupied housing units per county is taken from the decennial census and updated annually. The average number of days per year visitors hosted by residents and the average daily spending of these visitors are estimated from visitor survey data.

Vacation Home. The estimated spending by vacation home renters and owners is also based on census data and visitor survey data. The number of seasonal housing units per county is taken from the decennial census and updated annually. The average number of days per year that these units are occupied by owners or renters (where a hotel/motel occupancy tax is not collected) and the average daily spending of these visitors are estimated from visitor survey data.

Day Travel. The share of day visits as a percentage of total travel is estimated from visitor survey data and applied to average daily spending estimates to produce day visitor spending.

Air Transportation. Visitor spending estimates for air transportation are derived from the Origin-Destination survey conducted for the Bureau of Transportation Statistics. Employment and earnings estimates are derived from industry receipts, payroll, and employment data for passenger traffic. The impacts of air cargo operations on scheduled passenger flights are not included in these estimates.

Travel Arrangement Services. This category consists of travel agencies (NAICS 56151). Employment estimates are based on employment data provided by the Bureau of Labor Statistics. Spending estimates are derived from the 2012 Economic Census.

Related Travel Impacts

Spending by travelers generates jobs, payroll, and state and local tax revenue.

Earnings generated directly from traveler expenditures are estimated from the payroll-to-receipts ratio obtained from data published in the 2012 Economic Census and the state and county estimates of earnings and employment produced annually by the Bureau of Economic Analysis' Regional Economic Information System (REIS). Earnings includes payroll and other earned benefits of employees, and proprietor income.

Employment in each business category is calculated from average earnings data derived from ES-202 statistics and the earnings and employment produced annually by the Bureau of Economic Analysis' Regional Economic Information System (REIS).

Local Taxes consist of all local (municipality, county, special districts) point-of-sale taxes, including room taxes, sales taxes, and auto rental taxes. Property taxes are not included.

State Taxes consist of all statewide point of sale taxes (including sales taxes and motor fuel taxes) and personal and business income taxes.

Definition of Terms

Accommodation: Spending for lodging by hotel and motel guests, campers and vacation home users.

Air Transportation: Air passenger spending attributable to travelers in and to West Virginia. The spending total includes air travel spending made outside West Virginia for travel to West Virginia, purchases by West Virginia residents who travel outside the state, and air travel within the state.

Campers: Travelers staying at RV parks and commercial campgrounds or at public campgrounds such as those in State or National Parks.

Day Visitor: A traveler whose trip does not include an overnight stay and who travels from out of state or within state and out of his/her local area (50+ miles one way).

Travel Spending: Spending by travelers at or near their destinations. This includes spending on air transportation and for travel arrangement. All automobile operating expenses are included in the ground transportation component of destination spending

Earnings: Total earnings include wage and salary disbursements, other earned benefits and proprietor income. Only the earnings attributable to travel expenditures are included.

Eating, Drinking: Businesses serving food and beverages for immediate consumption. In addition to table service restaurants, this category includes fast-food outlets and refreshment stands.

Employment: Industry employment (jobs) associated with the travel-generated payroll and proprietors. This includes both full- and part-time positions.

Expenditures: Purchases by travelers during their trip, including hotel/motel taxes and other applicable local and state taxes paid by the traveler at the point of sale.

Food Stores: Grocery stores, supermarkets, fruit stands, retail bakeries, and other businesses selling food for consumption off the premises.

Ground Transport: Spending on car rentals, gasoline and other vehicle operating expenses, and on local transportation such as taxi, bus and train.

Hotel and Motel Guests: Travelers staying in hotels, motels, resorts, bed & breakfast establishments, condominiums, and other lodging places where the Hotel/Motel Occupancy Tax is collected.

Local Tax Receipts: Hotel/Motel Occupancy Tax revenue collected by counties and municipalities (no other local or municipal sales taxes are levied in the state).

Private Home Guests: Travelers staying as guests with friends or relatives.

Receipts: Travel expenditures less the sales and excise taxes imposed on those expenditures (also referred to as business receipts).

Recreation: Spending on amusement and recreation, such as admissions to tourist attractions.

Gaming: Revenue generated on racetrack video lottery and “live” on-site and simulcast wagering by visitors.

Retail Sales: Spending for gifts, souvenirs and other items (excludes spending listed separately, such as food stores or recreation).

Spending Distributions: Information from visitor surveys showing how spending by each type of visitor is divided between various business categories.

State Tax Receipts: State sales taxes, personal and business income taxes, motor fuel taxes, and car rental taxes attributable to travel expenditures.

Travel: A day or overnight trip that is not of a local or commuting nature. Travel may be for business or pleasure purposes.

Travel Arrangement: Spending for fees paid to travel agents and tour operators.

Traveler: A person traveling in West Virginia. A traveler may be a West Virginia resident or a resident of another state. The terms traveler and visitor have the same meaning in this report.

Vacation Home User: Travelers using their own vacation home or timeshare and those renting a vacation home or privately owned cabin where a hotel/motel occupancy tax is not collected.

Volume: Overnight visitor volume expressed in person nights, person trips, party nights, party trips. A visitor is anyone who visits West Virginia and stays the night, including those under 18.

TRAVEL IMPACT INDUSTRIES MATCHED TO 1997 NAICS

TRAVEL IMPACT INDUSTRY	NAICS INDUSTRIES* (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722) Residential Property Managers (531311)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487) Miscellaneous Industries (see note**)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Arrangement Services	Travel Arrangement and Reservation Services (5615)

Notes: *Government enterprizes (e.g., park systems) are included in this classification.

**Includes parts of industries in other sectors (e.g., accommodation, charter bus).

A more detailed description of these industries can be found at <http://www.ntis.gov/naics>.