

2025

Economic Impact of Visitors to West Virginia



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CONTENTS

Introduction

Key Findings

Results in Context

Visitor Volume and Spending

Economic Impact Methodology

Economic Impact

Appendix



Introduction

Visitors are integral to the West Virginia economy, generating significant financial benefits for residents and local businesses. Visitor activity also produces substantial tax revenue which supports government services.

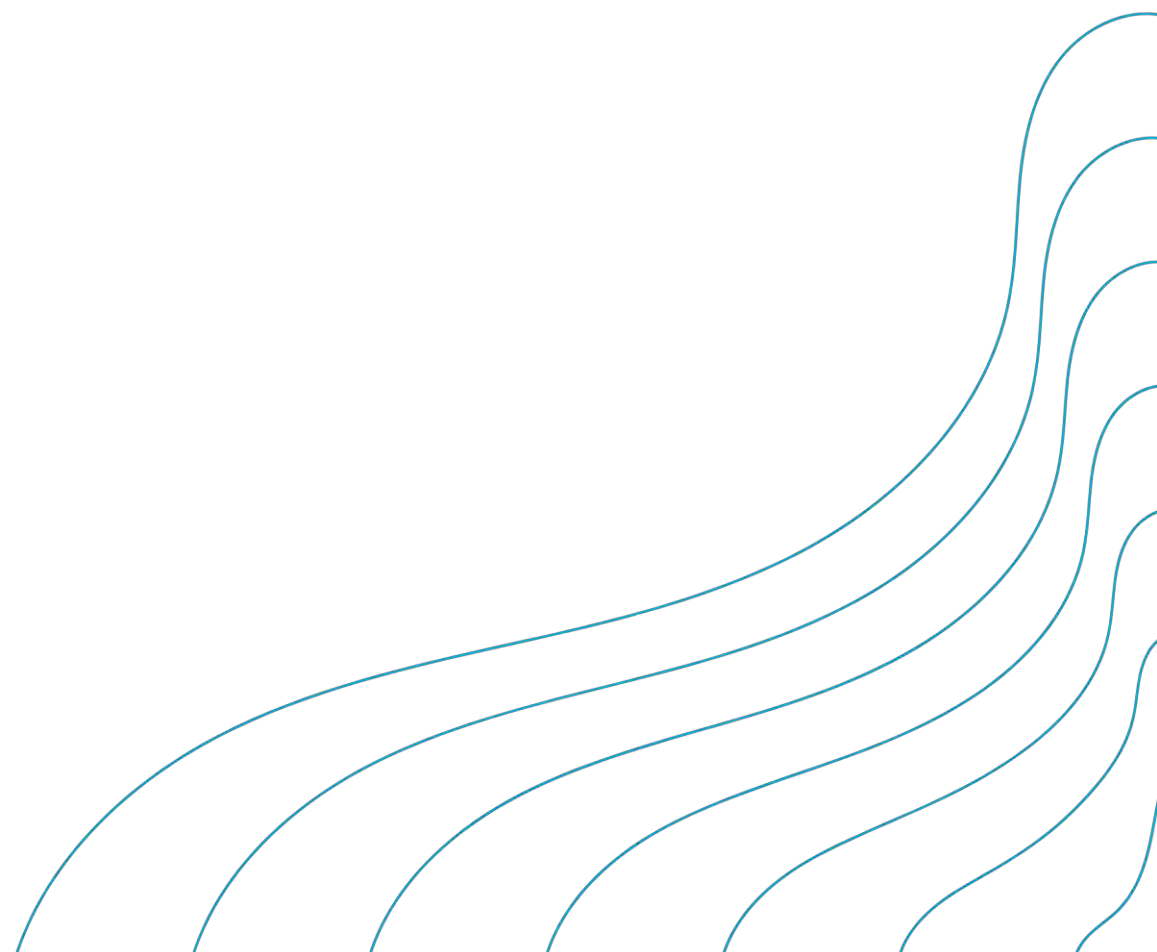
Credible measurements of the visitor economy are designed to inform policy decisions that foster the sector's development.

To quantify the significance of West Virginia's visitor economy, Tourism Economics developed a comprehensive analysis of visitor spending and its total economic impact on businesses, employment, personal income, and taxes. At a high level, our approach includes the following stages:

- Compilation of visitor statistics
- Compilation of industry data
- Compilation of government data
- Analysis of visitor spending by category
- Economic impact modeling

For the purposes of this analysis, a visitor is defined as someone from out-of-state who traveled at least 30 miles, and all travelers who stayed overnight or traveled more than 50 miles to the destination.

KEY FINDINGS



Key Findings

Visitors Generate Significant Economic Impact

In 2025, **78.4 million visitors** spent **\$6.8 billion** in the West Virginia economy, increases of 1.6% and 3.6%, respectively. Visitor spending generated a total economic impact of **\$9.4 billion**.



78.4M VISITORS TO WEST VIRGINIA



\$6.8B VISITOR SPENDING



\$9.4B TOTAL ECONOMIC IMPACT



\$2.3B TOTAL PERSONAL INCOME



61,728 TOTAL JOBS SUPPORTED



\$643M STATE AND LOCAL TAXES



Results in Context

The visitor economy is an economic pillar in West Virginia. In 2025, visitor spending supported one-in-15 jobs in West Virginia. In addition:



\$6.8B VISITOR SPENDING

Visitors spent \$18.7 million per day, on average, in West Virginia



\$2.3B PERSONAL INCOME

This is the equivalent of \$3,152 per resident household, regardless of any connection to the visitor economy.



61,728 JOBS

The visitor economy sustained 6.7% of all jobs in West Virginia when including indirect and induced jobs.

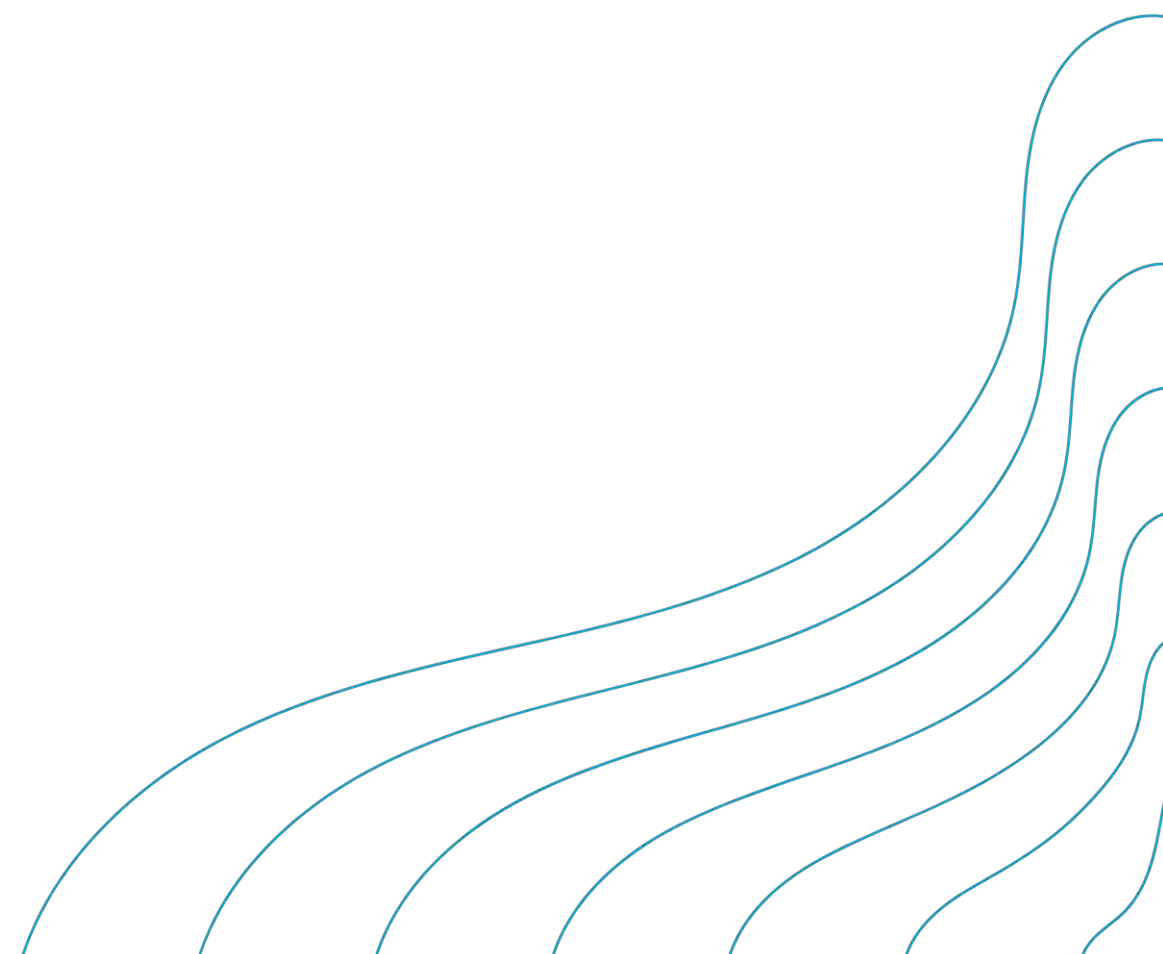


\$643M STATE & LOCAL TAXES

Each household would need to be taxed an additional \$882 to replace the visitor-generated taxes received by West Virginia state and local governments in 2025.



VISITOR VOLUME & SPENDING



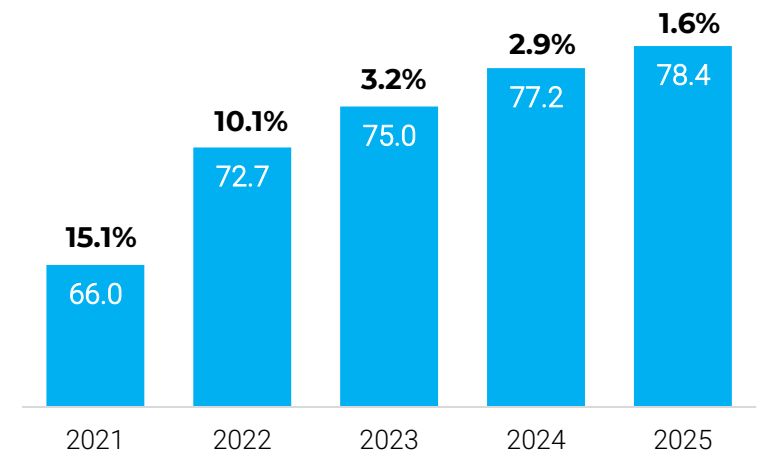
West Virginia welcomed **78.4 million** visitors who spent **\$6.8 billion** in 2025.



Visitor Volume

In 2025, 78.4 million visitors traveled to West Virginia, a 1.6% increase over the prior year. The overnight segment outpaced those traveling for the day, growing 1.9% vs. 1.6%. Among domestic visitors, travel rose 1.7%, while international arrivals declined nearly 18%, a national trend.

West Virginia Visitor Volume
millions

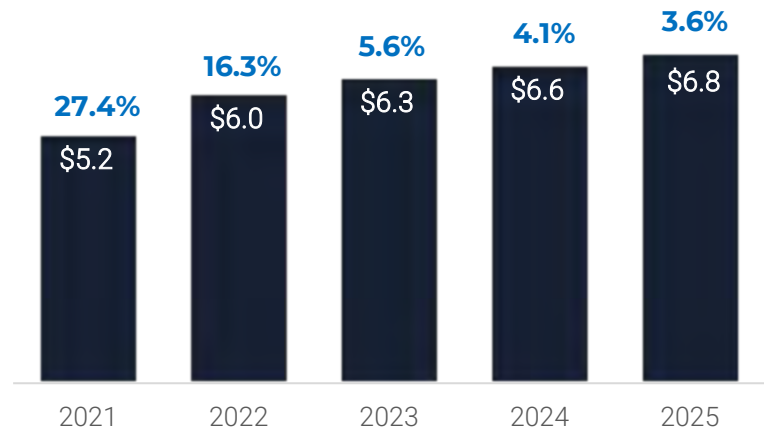


Source: Tourism Economics

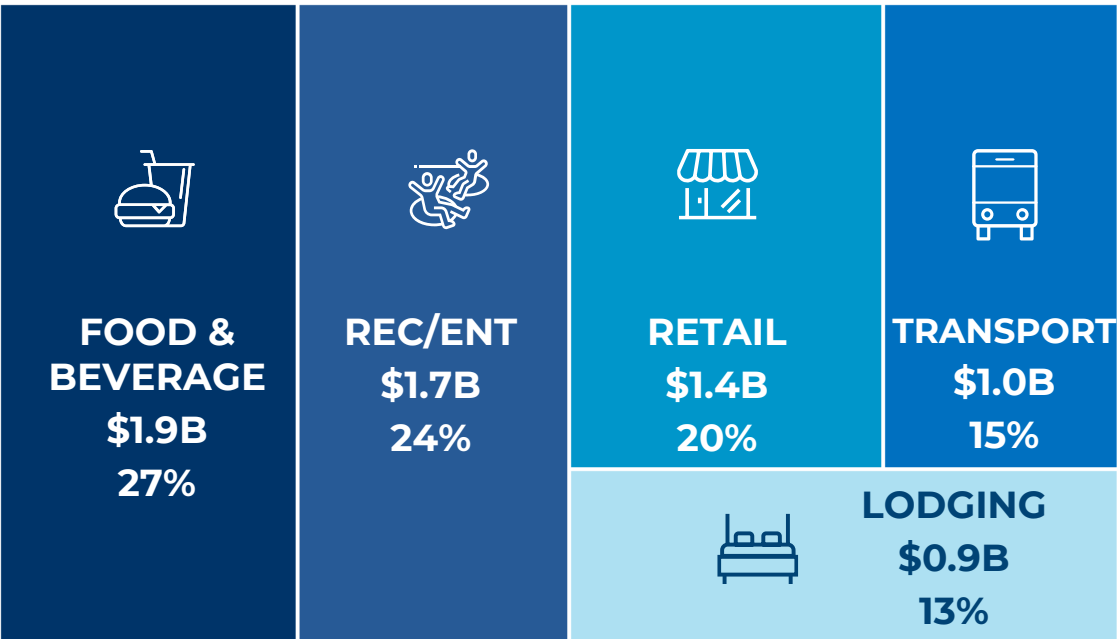
Visitor Spending

Visitor spending increased 3.6% in 2025, topping \$6.8 billion. Of the \$6.8 billion spent, food and beverage purchases accounted for \$1.9 billion—27% of all visitor spending. Visitors spent 24% of their budget on recreation, including spending at casinos.

West Virginia Visitor Spending
\$ billions



Source: Tourism Economics



Source: Tourism Economics

Note: Lodging includes all accommodation types

Visitor Spending in Detail

Visitor spending increased 3.6% in 2025, driven primarily by moderate demand and the impact of higher prices.

Food and beverage led spending growth (+5.1%), driven in part by strong price growth from the prior year. Recreation spending expanded 3.8% despite relatively flat casino revenue growth as visitors prioritized experiences, and lodging increased 3.2% with strong growth from short-term rentals.

The short-term rental market continued to be an important component, increasing its share of lodging revenues to 22% in 2025 from 18% in 2022.

West Virginia Visitor Spending Trends

\$ billions

	2021	2022	2023	2024	2025	2025 Growth
Total visitor spending	\$5.16	\$6.00	\$6.33	\$6.59	\$6.83	3.6%
Food & beverage	\$1.32	\$1.54	\$1.66	\$1.76	\$1.85	5.1%
Recreation	\$1.20	\$1.44	\$1.54	\$1.60	\$1.66	3.8%
Retail	\$1.08	\$1.21	\$1.30	\$1.35	\$1.39	2.7%
Transportation	\$0.84	\$1.00	\$0.99	\$1.01	\$1.03	2.6%
Lodging	\$0.72	\$0.80	\$0.85	\$0.87	\$0.90	3.2%

Source: Tourism Economics

Note: Lodging includes all accommodation types

Visitor volume increased 1.6% in 2025, with support from both the day and overnight segments. While accounting for just 22% of total volumes and 38% of overall spending, overnight visitors spend more than double that of day visitors, on average.

Compared to the U.S., West Virginia grew similarly in terms of visitor volumes but outpaced on the spending front as the state saw spending increase 3.6% compared to a 1.9% gain nationally.

West Virginia Visitor Spending by Segment

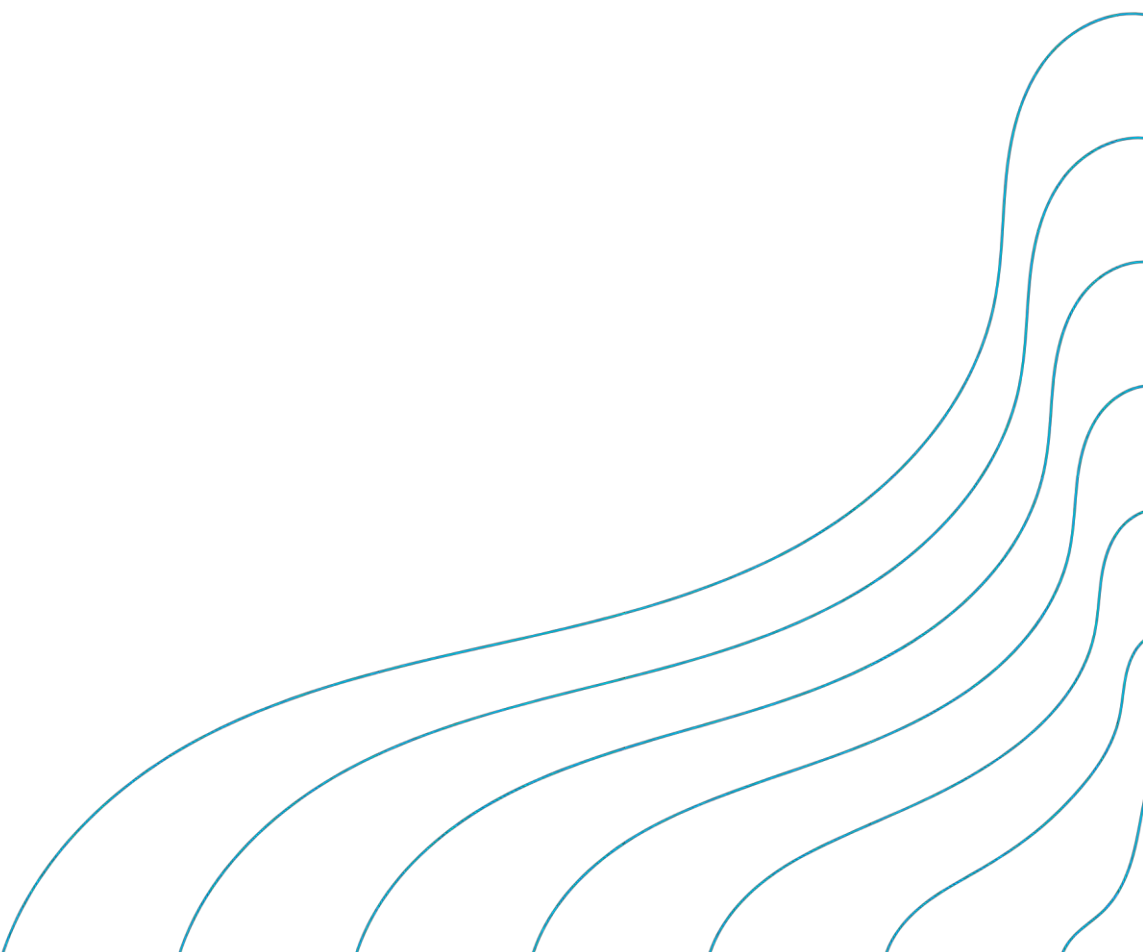
millions of visitors, \$ millions, \$ per person

	2021	2022	2023	2024	2025	2025 Growth
Total visitors	66.0	72.7	75.0	77.2	78.4	1.6%
Day	51.3	56.7	58.5	60.6	61.5	1.6%
Overnight	14.7	16.0	16.5	16.6	16.9	1.9%
Total visitor spending	\$5,159	\$5,999	\$6,335	\$6,592	\$6,833	3.6%
Day	\$3,240	\$3,749	\$3,941	\$4,125	\$4,278	3.7%
Overnight	\$1,919	\$2,250	\$2,394	\$2,467	\$2,555	3.6%
Per visitor spending	\$78	\$83	\$84	\$85	\$87	2.0%
Day	\$63	\$66	\$67	\$68	\$70	2.1%
Overnight	\$130	\$140	\$145	\$148	\$151	1.7%

Source: Tourism Economics

Visitor spending
increased 3.6% in
2025.

ECONOMIC IMPACT METHODOLOGY



Economic Impact Methodology

The development of visitor economy impact modeling begins with a comprehensive demand side analysis. Visitor survey data provides estimates on the volume of visitors by type and their spending in specific industries (e.g., lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are strengthened through an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type, as well as employment and personal income by industry, are used to supplement and confirm demand-side visitor spending calculations.

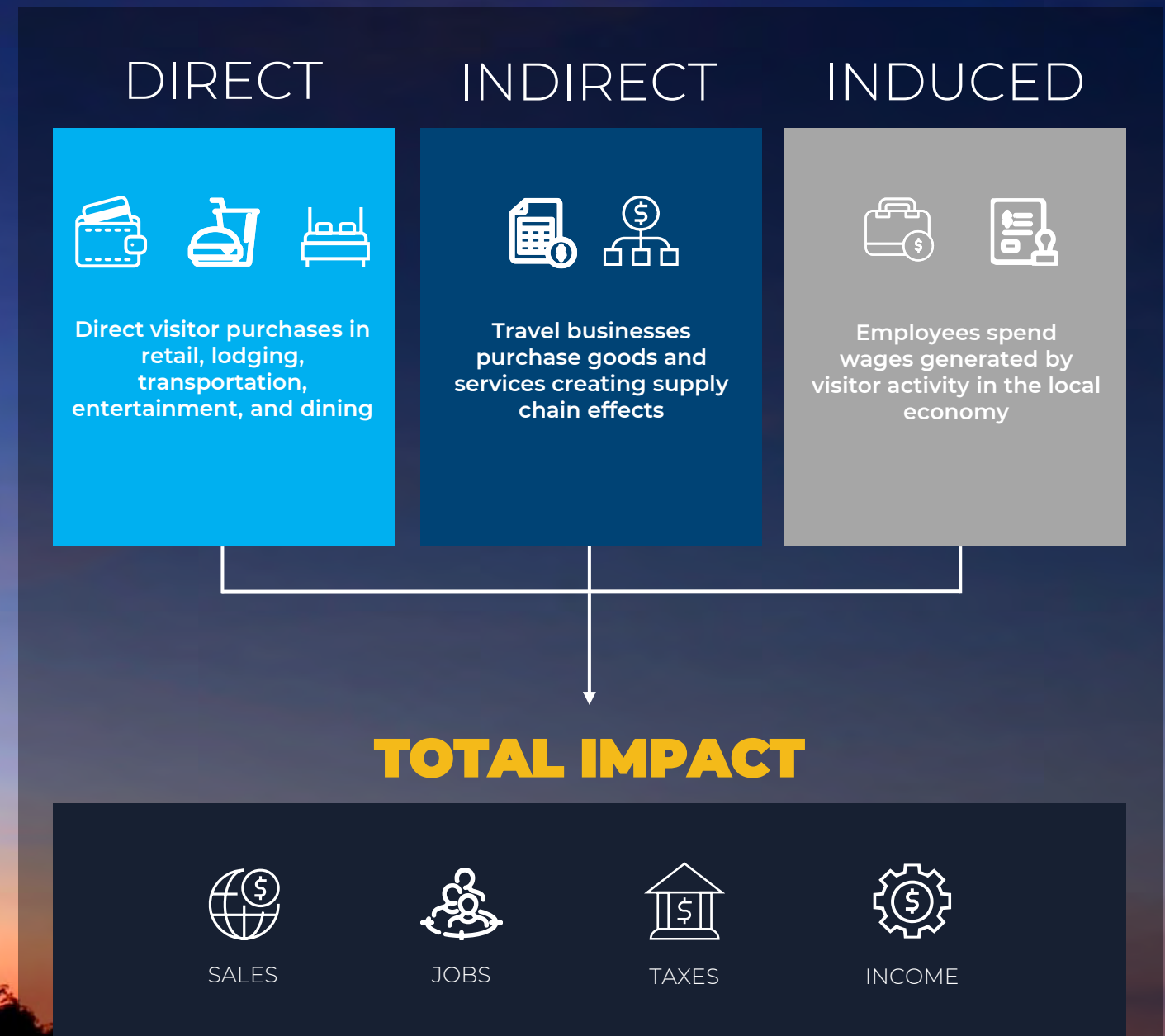
This provides a detailed profile of visitor spending by industry, which is then connected to a local input-output (I-O) economic impact model constructed within the IMPLAN platform. This uses government (Bureau of Economic Analysis and Census) data to trace the flow of visitor spending through the local economy and its effects on businesses, households, and government. The model quantifies three levels of impact:

- 1. Direct impacts:** Visitor spending creates direct economic value within a defined set of sectors. This supports a proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Businesses providing direct services to visitors purchase goods and services, generating additional impacts called indirect impacts or supply-chain effects.
- 3. Induced impacts:** Additional business activity is generated as employees spend incomes locally that are earned due to visitor activity. This is called the induced impact or income effect.

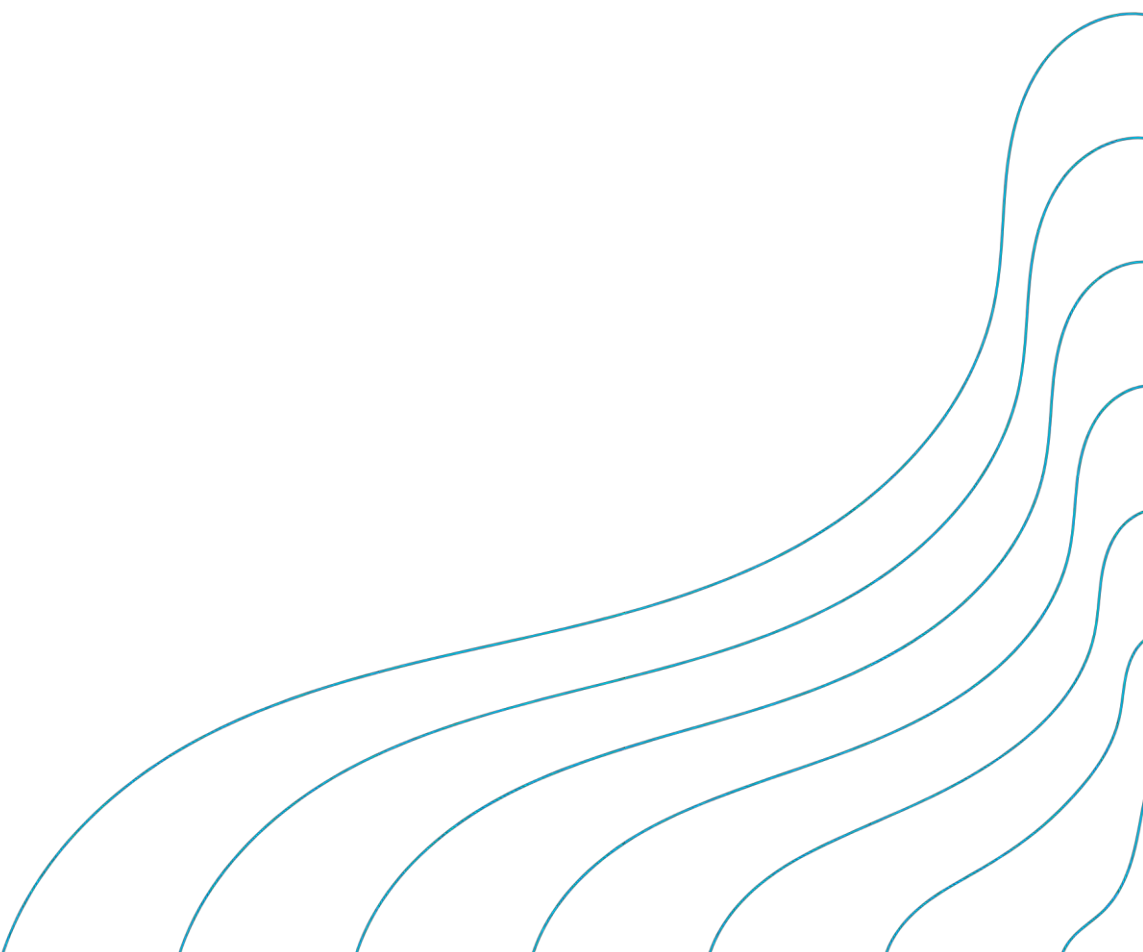
The model calculates these three levels of impact—direct, indirect and induced—for the following metrics:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

Economic Impact Model

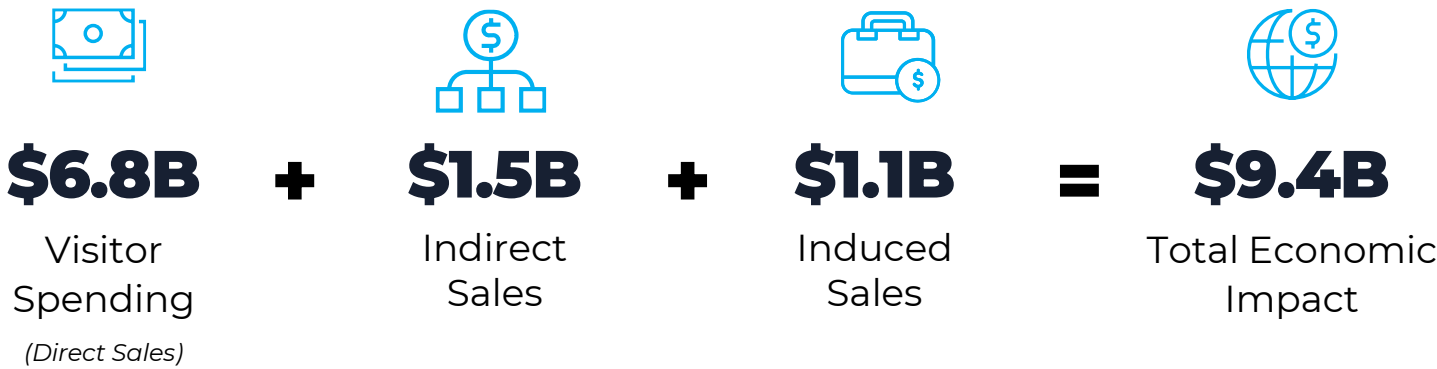


ECONOMIC IMPACT



Business Sales Impacts

Visitors contributed a direct impact of \$6.8 billion in 2025. This direct impact generated \$2.6 billion in indirect and induced impacts, resulting in a total economic impact of \$9.4 billion in the West Virginia economy. The total economic impact shows the benefits to the broader economy across industries at the indirect and induced levels.



Business Sales by Industry (2025)

\$ millions

	Direct Business Sales	Indirect Business Sales	Induced Business Sales	Total Business Sales
Total, all industries	\$6,833	\$1,459	\$1,146	\$9,438
Retail Trade	\$1,752	\$19	\$108	\$1,879
Food & Beverage	\$1,302	\$77	\$76	\$1,454
Recreation and Ent.	\$1,340	\$43	\$16	\$1,399
Lodging	\$1,038	\$0	\$1	\$1,039
Finance, Insurance, and Real Estate	\$225	\$422	\$299	\$946
Gasoline	\$889	\$1	\$8	\$898
Business Services	\$30	\$367	\$82	\$480
Education and Health Care		\$7	\$317	\$324
Personal Services	\$152	\$50	\$30	\$232
Other Transport	\$103	\$58	\$21	\$183
Communications		\$132	\$33	\$165
Construction and Utilities		\$109	\$36	\$145
Wholesale Trade		\$72	\$47	\$119
Government		\$57	\$46	\$103
Manufacturing		\$30	\$16	\$46
Agriculture, Fishing, Mining		\$14	\$9	\$23
Air Transport		\$1	\$1	\$2

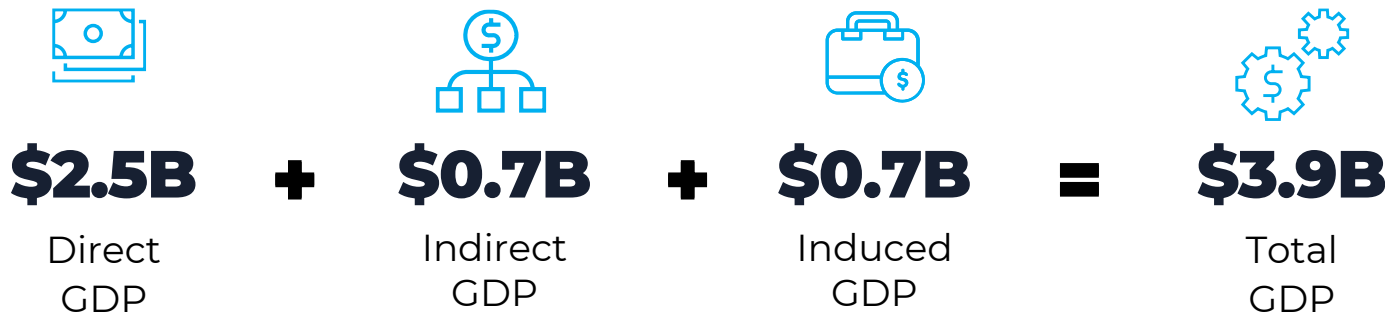
Source: Tourism Economics

Visitor spending contributed a total economic impact of **\$9.4 billion.**

GDP (Value Added Impacts)

West Virginia’s visitor economy GDP increased to \$3.9 billion in 2025. This represented 3.6% of West Virginia’s entire economy.

GDP removes the value of all imported (from other states and internationally) goods and services.



GDP by Industry (2025)

\$ millions

	Direct GDP	Indirect GDP	Induced GDP	Total GDP
Total, all industries	\$2,541	\$696	\$658	\$3,895
Food & Beverage	\$572	\$42	\$36	\$650
Lodging	\$576	\$0	\$0	\$577
Finance, Insurance, and Real Estate	\$177	\$189	\$198	\$564
Recreation and Ent.	\$542	\$13	\$6	\$561
Retail Trade	\$408	\$14	\$75	\$497
Business Services	\$11	\$206	\$47	\$264
Education and Health Care		\$3	\$178	\$181
Personal Services	\$82	\$27	\$17	\$126
Other Transport	\$72	\$35	\$12	\$119
Gasoline	\$101	\$0	\$5	\$107
Wholesale Trade		\$36	\$25	\$61
Construction and Utilities		\$44	\$16	\$60
Communications		\$42	\$13	\$55
Government		\$28	\$22	\$50
Agriculture, Fishing, Mining		\$8	\$5	\$12
Manufacturing		\$7	\$3	\$10
Air Transport		\$1	\$0	\$1

Source: Tourism Economics



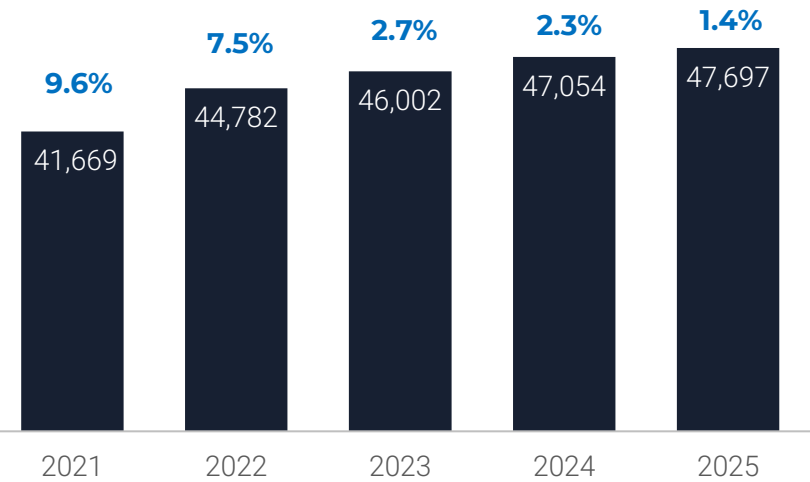
Direct Employment

Employment directly supported by visitor activity increased 1.4% in 2025, reaching 47,697 jobs.

Visitor-supported employment is a significant part of several industries in West Virginia—nearly all of lodging employment, 59% of recreation employment, and 28% of food and beverage jobs are supported by visitor spending.

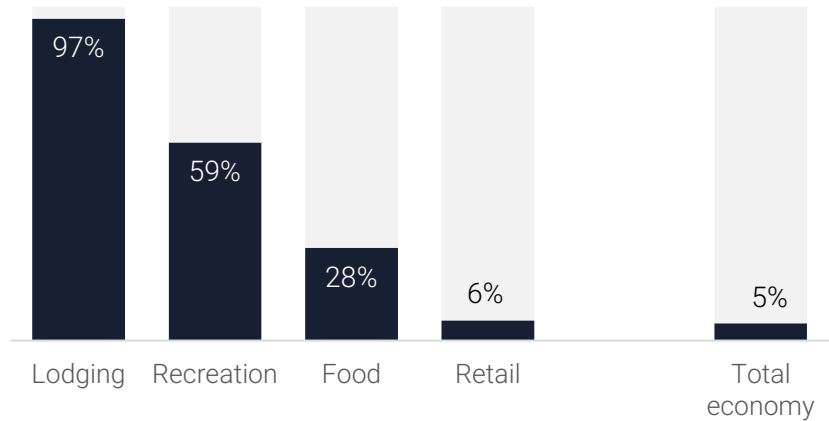
Overall, direct tourism jobs accounted for 5.2% of all jobs in West Virginia in 2025.

Visitor-Supported Employment in West Virginia
jobs, direct only



Source: Tourism Economics

Tourism Employment Intensity
share of total industry employment



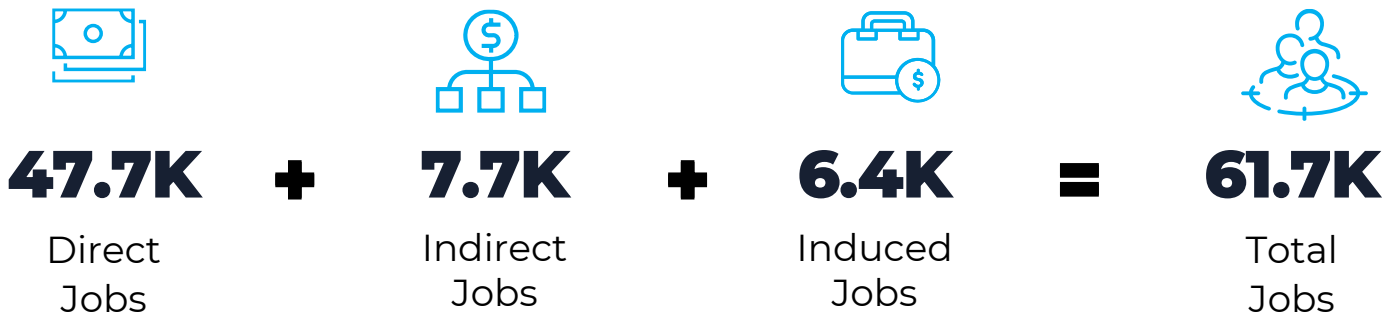
Source: Tourism Economics

The visitor economy in **West Virginia** directly supported **47,697 jobs**, 5.2% of all jobs in the state.



Employment Impacts

Visitor activity sustained 47,697 direct jobs in 2025, with an additional 14,031 jobs supported from the indirect and induced impacts of visitor activity. Total employment impacts tallied 61,728 in 2025, translating to 6.7% (1-in-15) of all jobs in the state.



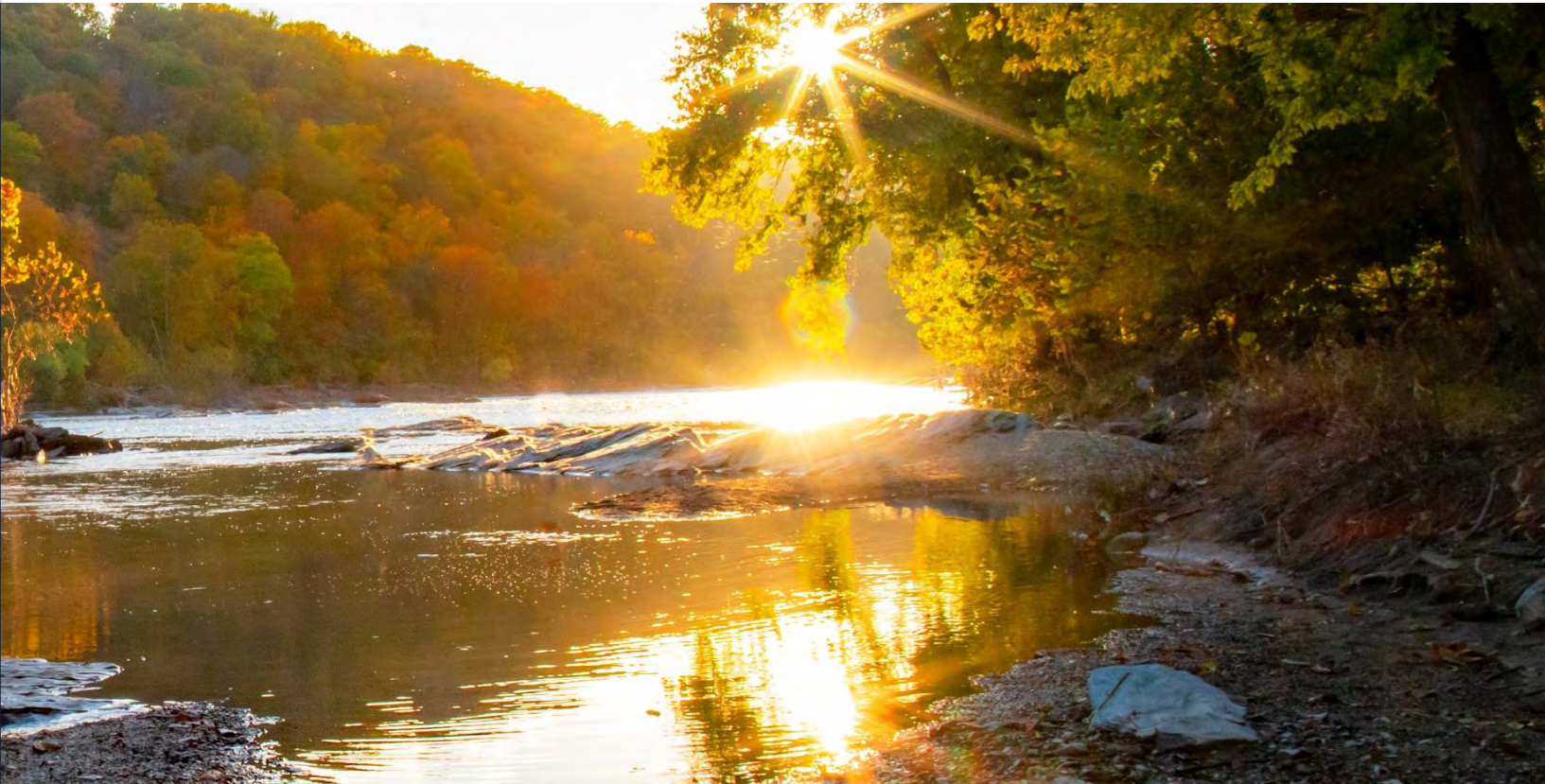
Employment by Industry (2025)

jobs

	Direct Jobs	Indirect Jobs	Induced Jobs	Total Jobs
Total, all industries	47,697	7,670	6,361	61,728
Food & Beverage	15,760	888	772	17,420
Lodging	10,756	1	7	10,764
Recreation and Entertainment	9,421	406	165	9,992
Retail Trade	5,915	172	975	7,062
Personal Services	3,115	391	298	3,804
Business Services	185	2,462	536	3,183
Finance, Insurance, and Real Estate	362	1,475	496	2,333
Education and Health Care		64	2,143	2,207
Other Transport	1,372	578	169	2,119
Gasoline	811	6	68	885
Government		328	391	719
Communications		320	78	398
Wholesale Trade		231	113	344
Construction and Utilities		207	78	285
Agriculture, Fishing, Mining		75	53	128
Manufacturing		63	17	80
Air Transport		3	2	5

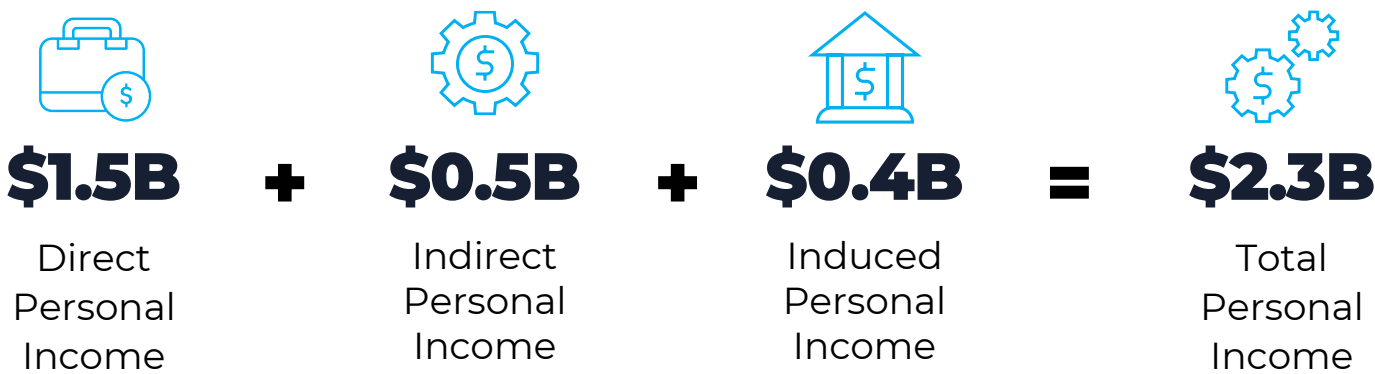
Source: Tourism Economics

The visitor economy supported **17,420 food and beverage jobs** and **nearly 10,000 recreation jobs** in West Virginia.



Personal Income Impacts

Visitor activity generated \$1.5 billion in direct personal income in 2025. Including indirect and induced impacts, employees received a total of \$2.3 billion in personal income, 4.7% more than the prior year.



Personal Income by Industry (2025)

\$ millions

	Direct Personal Income	Indirect Personal Income	Induced Personal Income	Total Personal Income
Total, all industries	\$1,475	\$452	\$370	\$2,297
Food & Beverage	\$442	\$29	\$23	\$493
Lodging	\$399	\$0	\$0	\$399
Recreation and Ent.	\$217	\$5	\$4	\$225
Business Services	\$9	\$178	\$38	\$224
Retail Trade	\$182	\$6	\$35	\$223
Education and Health Care		\$3	\$160	\$162
Other Transport	\$81	\$38	\$11	\$131
Personal Services	\$95	\$22	\$13	\$129
Finance, Insurance, and Real Estate	\$18	\$70	\$28	\$116
Government		\$27	\$29	\$56
Gasoline	\$33	\$0	\$3	\$35
Communications		\$26	\$7	\$33
Construction and Utilities		\$23	\$8	\$31
Wholesale Trade		\$20	\$11	\$30
Manufacturing		\$4	\$1	\$5
Agriculture, Fishing, Mining		\$2	\$0	\$2
Air Transport		\$0	\$0	\$0

Source: Tourism Economics



Tax Impacts

Visitor activity generated \$1.1 billion in government revenues in 2025, with state and local taxes alone nearing \$643 million.

Each household in West Virginia would need to be taxed an additional \$882 to replace the visitor-generated taxes received by state and local governments in 2025.

Tax Impacts

\$ millions

	2025
Total Tax Revenues	\$1,112.1
Federal Taxes	\$469.6
Personal Income	\$140.3
Corporate	\$42.5
Indirect Business	\$94.4
Social Insurance	\$192.4
State Taxes	\$378.3
Sales	\$285.1
Personal Income	\$39.1
Corporate	\$11.4
Excise and Fees	\$41.8
Property	\$0.8
Local Taxes	\$264.2
Sales	\$14.6
Bed Tax	\$43.5
Excise and Fees	\$26.1
Property	\$180.1

Source: Tourism Economics

Visitor spending
reduces the tax
burden by nearly
**\$882 per
household** in
West Virginia.

Appendix

Methodology Overview

Measuring the visitor economy begins with a comprehensive demand side analysis. A visitor is defined as someone from out-of-state who traveled at least 30 miles, and all travelers who stayed overnight or traveled more than 50 miles to the destination.

The study area is defined as the state of West Virginia.

Visitor survey data provide estimates on the volume of visitors by type and their spending in specific categories (e.g., lodging, restaurants, retail, recreation and entertainment, transportation). These estimates are supplemented with an analysis of industry-specific data sets on the lodging industry, aviation, and sectoral-level business sales. Government data, including taxes by type as well as employment and personal income by industry are used to supplement and confirm demand-side visitor spending calculations.

The primary source of the employment and wage data is the Regional Economic Information System (REIS), maintained by the Bureau of Economic Analysis (BEA). This is more comprehensive than Bureau of Labor Statistics (BLS QCEW) data because sole-proprietors do not require unemployment insurance and are not counted in the QCEW data.

The complete set of data inputs is provided below.

Data Sources

- **Longwoods International:** Consumer survey data, including spending and visitor profile characteristics
- **STR/AirDNA:** Lodging performance data, including room demand and revenue, for hotels and short-term rentals
- **West Virginia Department of Revenue and localities:** Lodging tax by county and sales tax receipts by industry
- **BEA/BLS:** Employment and wage data, by industry
- **US Census:** Business sales and employment by industry, and seasonal second homes inventory
- **Tourism Economics:** International arrivals data for visitors to West Virginia

Glossary

SPENDING DEFINITIONS	LODGING	All accommodation businesses, including hotels, B&Bs, campgrounds, and short-term rentals. This includes food, entertainment, and other services provided by these establishments.
	FOOD & BEVERAGE	Includes all visitor spending on food & beverages, including at restaurants, bars, grocery stores and other food providers.
	RECREATION	Includes visitors spending within the arts, entertainment and recreation sector.
	RETAIL	Includes visitor spending in all retail sub-sectors within the local economy, excluding grocery stores.
	LOCAL TRANSPORT	Ride share, taxis, limos, trains, rental cars, buses, and gasoline purchases.
	AIR TRANSPORT	Where applicable, the local share of air transportation spending.
ECONOMIC IMPACT DEFINITIONS	SECOND HOMES	Where applicable, spending associated with seasonal second homes for recreational use as defined by the Census Bureau.
	DIRECT IMPACT	Impacts (business sales, jobs, income, and taxes) related to businesses where visitors spend dollars (e.g. recreation, transportation, lodging).
	INDIRECT IMPACT	Impacts created from the purchase of goods and services as inputs (e.g. food wholesalers, utilities, business services) into production by the directly affected sectors (i.e. business-to-business purchases).
	INDUCED IMPACT	Impacts created from spending in the local economy by employees whose wages are generated either directly or indirectly by visitor activity.
	EMPLOYMENT	Employment is measured by the Bureau of Economic Analysis (BEA) definition, and captures full-time and part-time jobs, which includes salary and wage employees and proprietors.
	PERSONAL INCOME	Income (wages, salaries, proprietor income and benefits) supported by visitor spending.
	VALUE ADDED (GDP)	Business sales net of intermediate (supply chain) purchases.
	LOCAL TAXES	City and County taxes generated by visitor spending. Includes any local sales, income, bed, usage fees, licenses and other revenue streams to local governmental authorities.
	STATE TAXES	State tax revenues generated by visitor spending. Includes sales, income, corporate, usage fees and other assessments of state governments.

About the Research Team

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics was founded in 1981 as a commercial venture with Oxford University's business college to provide economic forecasting and modeling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world's foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

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