

# West Virginia Travel Impacts *2000-2016p*

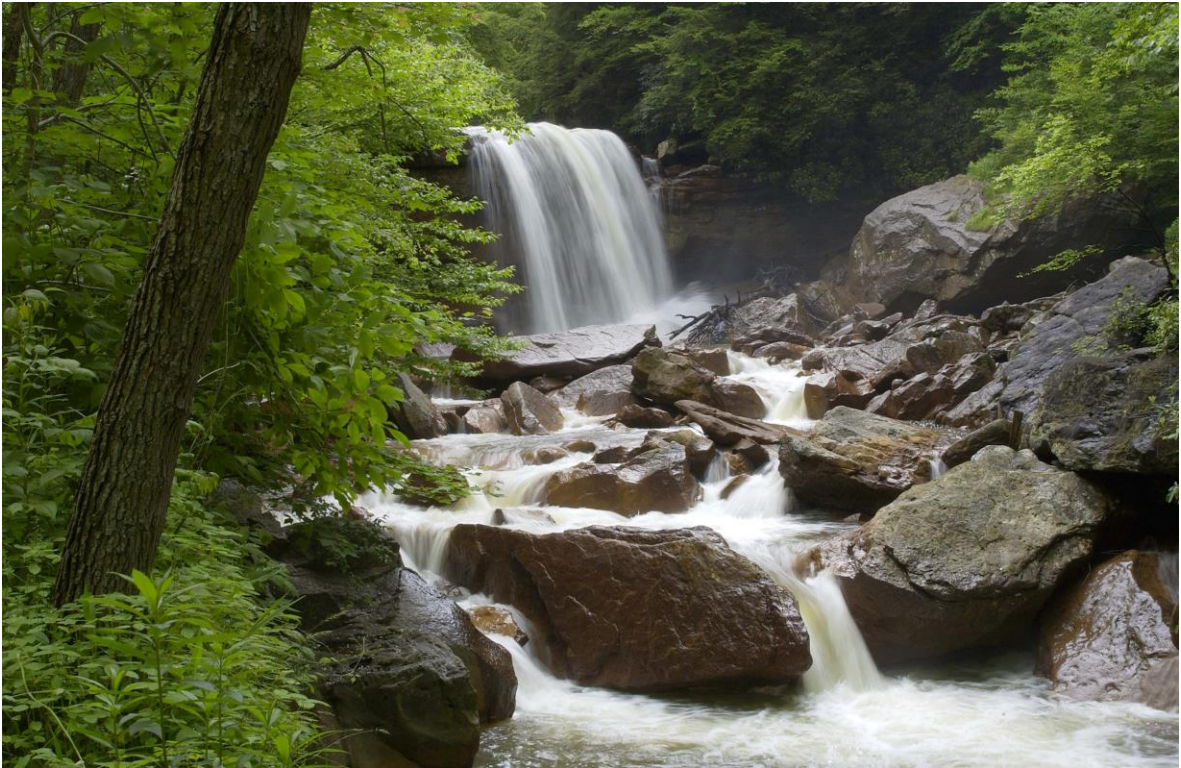


Photo credit: West Virginia Tourism Office

*August 2017*

*Prepared for the*

West Virginia Tourism Office  
Charleston, West Virginia

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## Preface

The purpose of this study is to document the economic significance of the travel industry in West Virginia from 2000 to 2016. 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 then 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.

Finally, special thanks are due to Joe Black, Director of Research, West Virginia Tourism Office. Without his support and assistance, this report would not have been possible.

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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 2016. 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

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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).

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## Visitor Categories

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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.

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## **Report Contents**

Section II provides an overview of Travel Impacts in the state, detailed estimates for 2000 through 2016, 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.

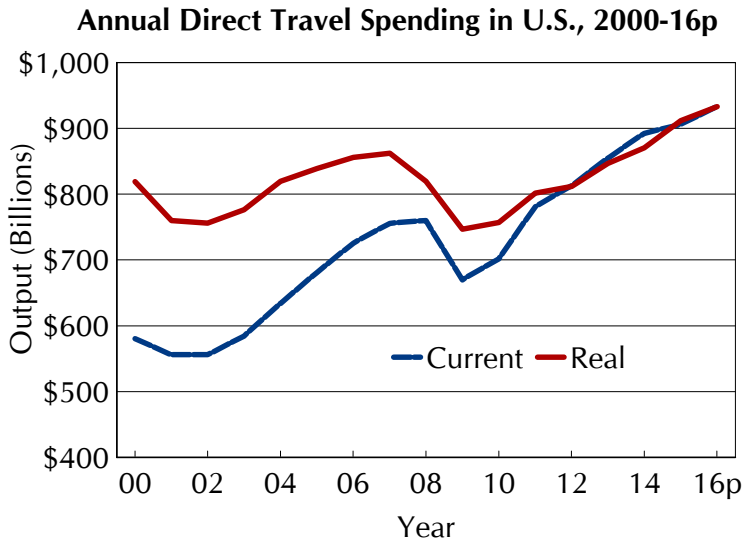
A description of the RTIM methodology is included in Appendix A. Definitions of the travel terms used in this report can be found in Appendix B. Appendix C provides a description of travel industries in terms of NAICS.

## II. NATIONAL TRAVEL TRENDS

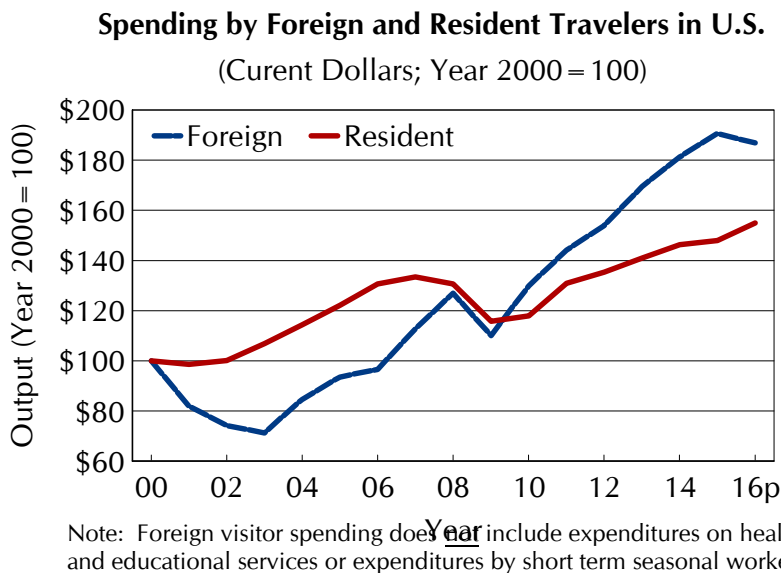


The national level data in this section focuses on visitor spending trends in current and real dollars, resident and foreign visitor spending in the U.S., and trends in travel-generated employment.

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. The 2016 values are based on the first three quarters of the year.



Spending by resident and foreign visitors was \$933 billion in 2016 in current dollars. This represents a 3.0 percent increase over 2015. When adjusted for changes in prices (real dollars), spending increased by 2.3 percent from 2015 to 2016 - compared to a 4.7 percent increase for the preceding year.

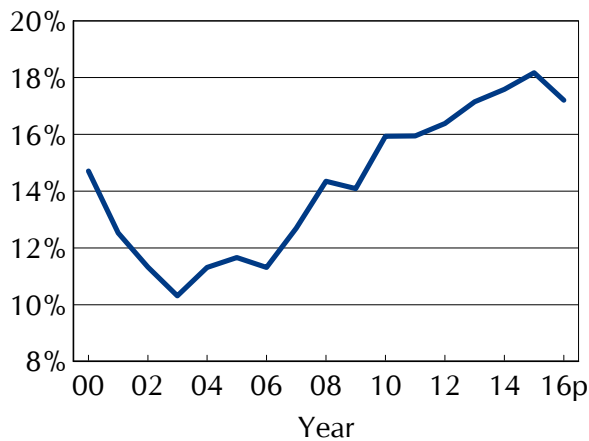


The bottom chart compares the change in current dollar spending by resident and foreign visitors since 2000. In 2016, the increase in spending by resident visitors (4.7 percent) compares to a 2.0 percent decrease in non-resident spending. Visitor spending by non-residents increased by 5.2 percent from 2014 to 2015.

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

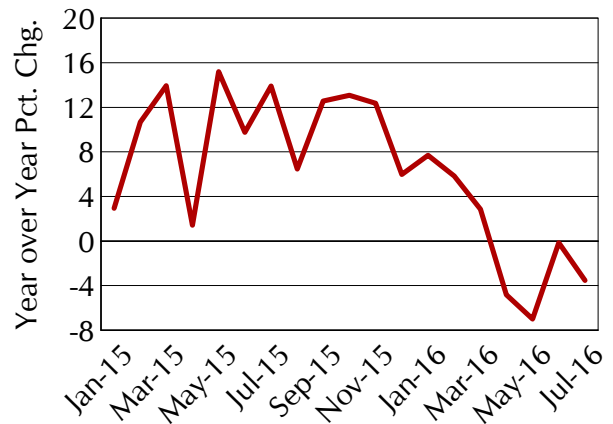
The foreign share of U.S. internal travel declined by almost a full percent point from 2015 to 2016 (18.2 percent to 17.2 percent). This has been due to two factors. First, overseas arrivals began to show a decreasing rate of growth in the beginning of 2016 and actually declined in absolute numbers in the most recently reported months. Secondly, the value of foreign currencies has fall relative to the U.S. dollar. This not only discourages travel to the U.S., but also means that foreigners that do travel to the U.S. have less money to spend on goods and services.

**Foreign Share of U.S. Internal Travel Spending**



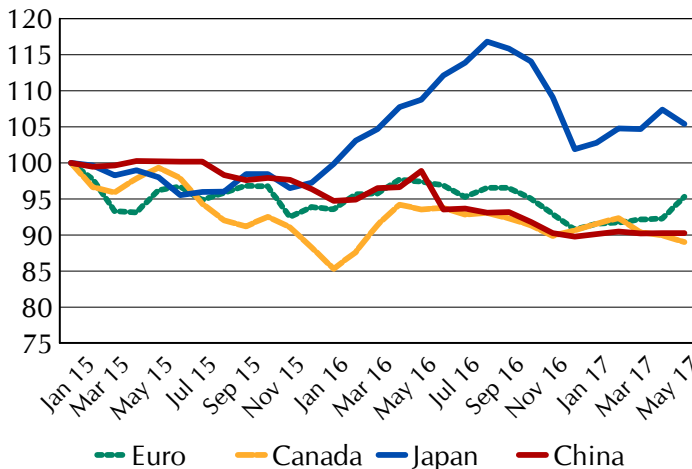
Note: Internal travel does not include spending on international airfares to U.S carriers.

**Overseas Arrivals**  
(Year over Year Percent Change)



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

Monthly Averages, Jan 2015 through May 2017



Sources:

Foreign Share of U.S Internal Travel: Bureau of Economic Analysis Travel & Tourism Satellite Accounts and International Transactions.

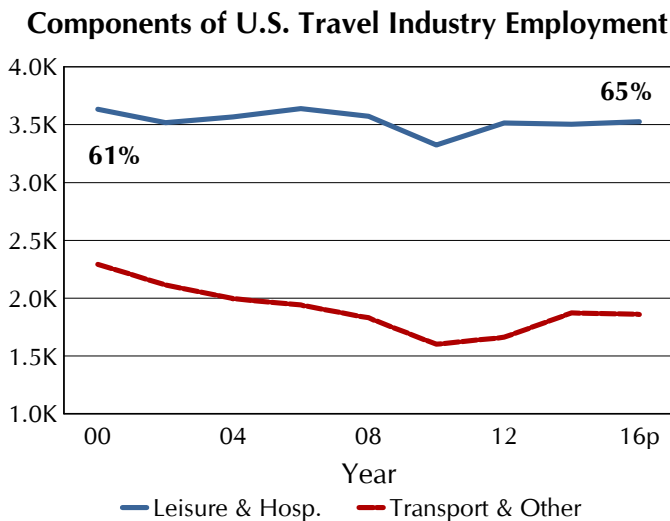
Overseas Arrivals: Office of Travel and Tourism Industries, U.S. Department of Commerce.

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 2013. Since then, however, there has been no significant employment growth in the industry. Leisure and hospitality employment was 3.5 million in 2016 or 65 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. However, 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.

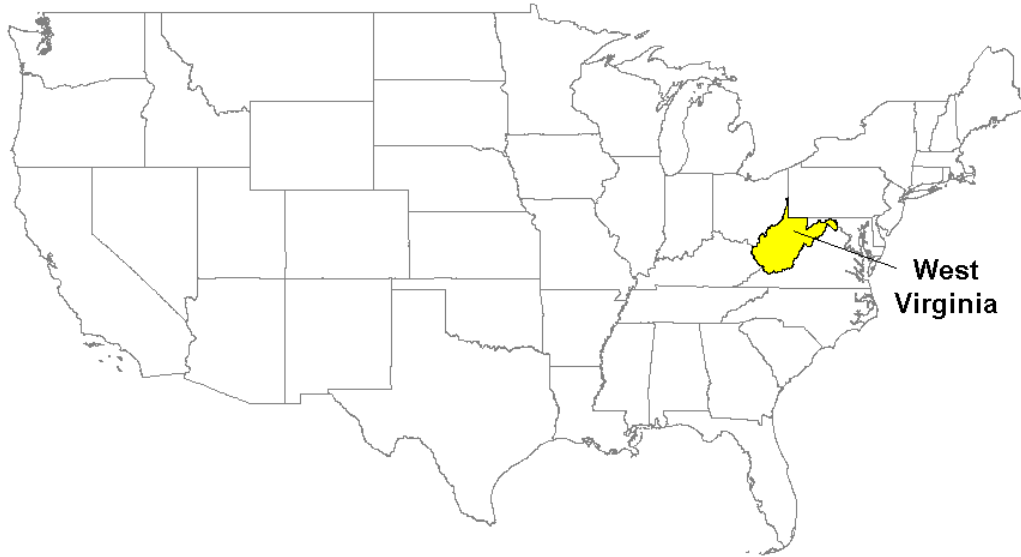


Source: Bureau of Economic Analysis Travel & Tourism Satellite Accounts.



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 2000-2016p



West Virginia's \$4.1 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 was \$4.1 billion in the 2016 calendar year. This is equivalent to approximately \$11.3 million dollars per day.
- Between 2000 and 2012, travel spending in West Virginia has increased by 5.8 percent per year, reaching a peak in 2012 of \$4.8 billion. From 2012 to 2016, travel spending has declined by 3.8 percent per year to \$4.1 billion. In constant dollars (adjusted for inflation), travel spending has decreased by about 2 percent per year from 2012 to 2016.
- Visitors who stayed overnight in commercial lodging facilities spent \$1.4 billion in 2016 – or about one-third of all travel spending in the state. Day travelers who spent substantially on gaming and entertainment spent nearly \$1.8 billion.
- During 2016, visitor spending in West Virginia directly supported about 45,000 jobs with earnings of \$1.1 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 \$527 million in 2016 (does not include property taxes). Without these government revenues generated travel spending, each household in West Virginia would have had to pay an additional \$700 in state and local taxes to maintain current service levels.

The following tables and graphs document these travel impacts. Detailed travel impact estimates for the state from 2000 to 2016 are found on pages 15 and 16.

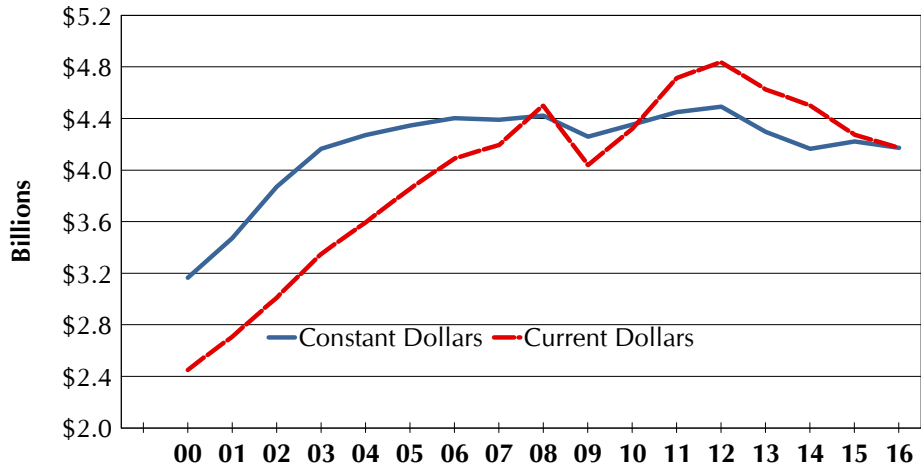
## West Virginia Direct Travel Impacts, 2000-2016p

	Spending (\$Million)	Earnings (\$Million)	Employment (Thousand)	Government Revenue (\$Million)		
				Local	State	Federal
2000	2,450	610	36.0	15.1	280.8	140.4
2001	2,708	667	38.4	17.7	340.6	153.6
2002	3,010	734	40.8	20.7	396.1	165.6
2003	3,349	787	42.5	23.3	449.5	180.6
2004	3,594	815	42.9	26.2	525.7	190.0
2005	3,855	848	44.3	27.8	536.3	192.5
2006	4,088	874	44.6	30.5	552.4	197.9
2007	4,195	904	44.4	32.4	556.4	203.1
2008	4,499	931	44.7	42.2	557.0	208.8
2009	4,039	942	44.6	41.1	545.7	208.6
2010	4,319	997	45.0	45.5	534.3	217.8
2011	4,713	1,025	45.3	54.4	533.9	204.3
2012	4,836	1,065	46.2	58.6	543.4	208.1
2013	4,636	1,065	46.6	53.9	492.4	221.1
2014	4,509	1,073	46.2	49.9	477.9	220.9
2015	4,261	1,109	44.9	53.8	484.8	223.5
2016p	4,141	1,125	44.9	51.6	475.1	224.3
<i>Annual Percent Change</i>						
15-16p	-2.8%	1.5%	0.1%	-4.1%	-2.0%	0.4%
00-16p	3.3%	3.9%	1.4%	8.0%	3.3%	3.0%

Note: Estimates for 2016p 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.

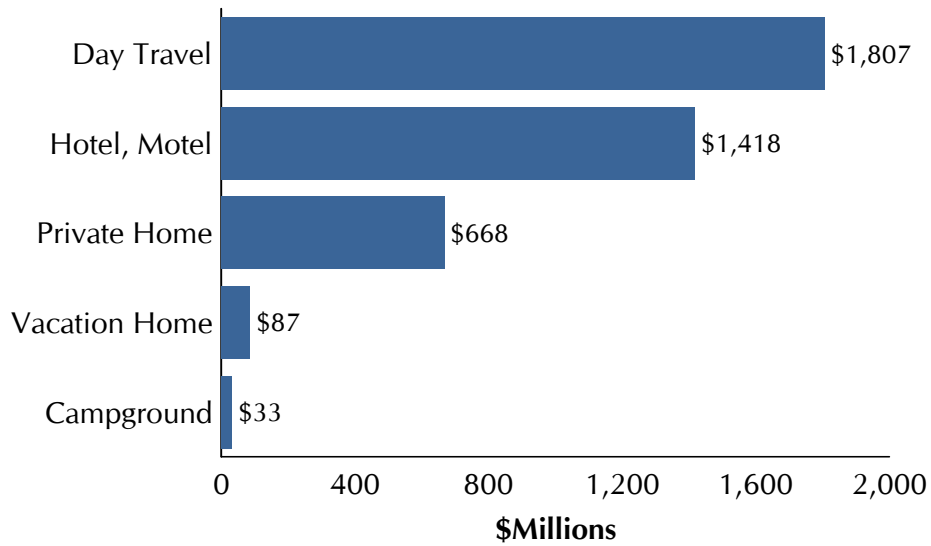


### West Virginia Visitor Spending Adjusted for Inflation, 2000-2016p

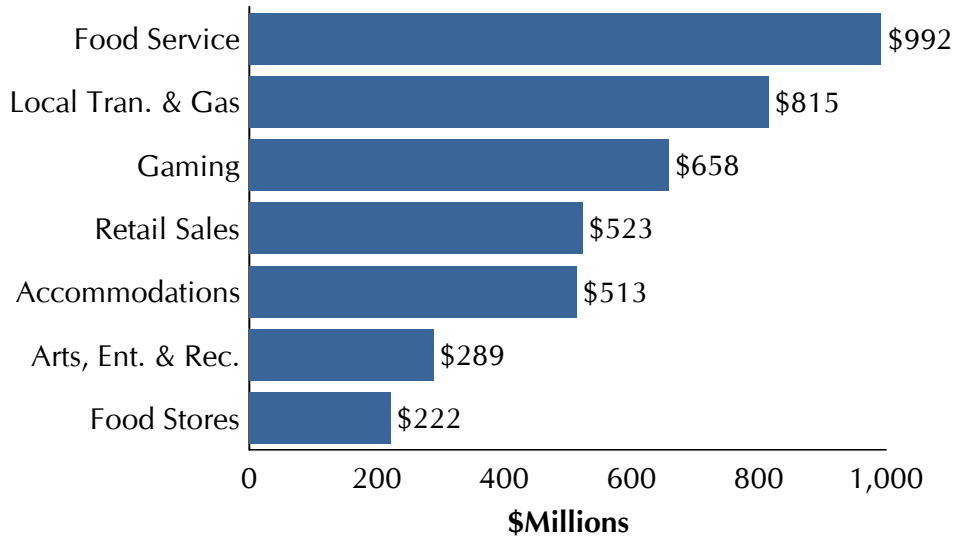


Source: Dean Runyan Associates

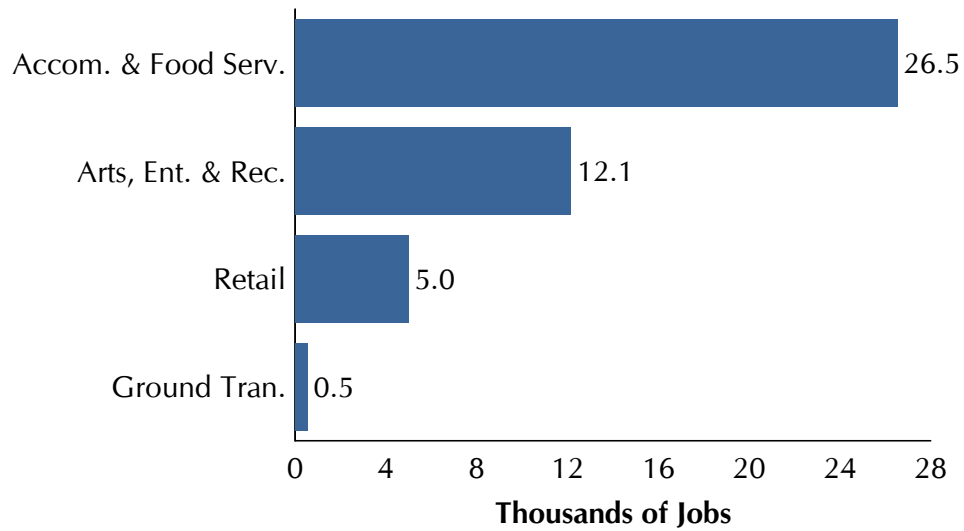
### West Virginia Visitor Spending by Type of Traveler Accommodation, 2016p (\$Millions)



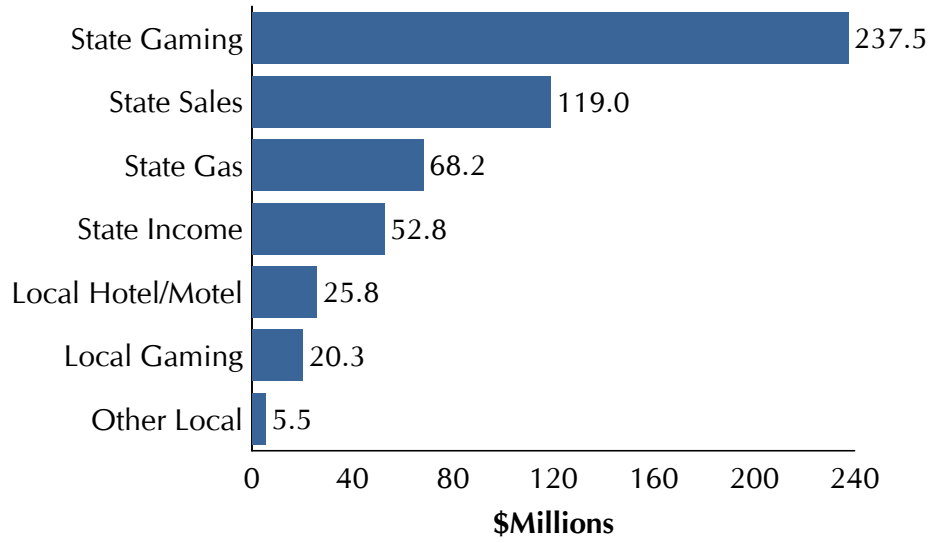
**West Virginia Visitor Spending  
by Commodity Purchased, 2016p**  
(Millions)



**West Virginia Direct Employment  
Generated by Travel Spending, 2016p**  
(Thousands of Jobs)



**State and Local Travel-Generated  
Government Revenue, 2016p**  
(\$Millions)



## West Virginia Travel Impacts, 2000-2010

	2000	2002	2004	2006	2008	2010
<b>Total Direct Travel Spending (\$Million)</b>						
Destination Spending	2,370	2,926	3,480	3,958	4,368	4,194
Other Travel*	81	83	114	129	131	125
Total Direct Spending	2,450	3,010	3,594	4,088	4,499	4,319
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>						
Hotel, Motel	915	998	1,102	1,232	1,405	1,339
Campground	19	23	24	28	37	37
Private Home	464	480	561	659	770	731
Vacation Home	62	65	73	84	95	92
Day Travel	909	1,360	1,720	1,955	2,061	1,996
Destination Spending	2,370	2,926	3,480	3,958	4,368	4,194
<b>Visitor Spending by Commodity Purchased (\$Million)</b>						
Accommodations	330	353	373	399	433	421
Food Service	477	594	667	727	790	843
Food Stores	128	149	162	173	191	198
Local Tran. & Gas	438	481	696	980	1,279	1,106
Arts, Ent. & Rec.	233	258	273	278	278	278
Gaming	368	636	835	915	916	842
Retail Sales	396	456	475	487	482	506
Destination Spending	2,370	2,926	3,480	3,958	4,368	4,194
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>						
Accom. & Food Serv.	301	352	389	428	469	490
Arts, Ent. & Rec.	180	231	270	282	300	338
Retail**	93	106	109	115	119	126
Ground Tran.	10	13	14	15	15	15
Other Travel*	26	33	33	34	29	28
Total Direct Earnings	610	734	815	874	931	997
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>						
Accom. & Food Serv.	19.6	22.0	23.4	24.8	25.3	25.3
Arts, Ent. & Rec.	9.4	11.2	12.3	12.7	12.6	13.2
Retail**	5.0	5.4	5.3	5.4	5.2	5.2
Ground Tran.	0.5	0.5	0.5	0.5	0.6	0.5
Other Travel*	1.5	1.6	1.5	1.2	1.0	0.8
Total Direct Employment	36.0	40.8	42.9	44.6	44.7	45.0
<b>Government Revenue Generated by Travel Spending (\$Million)</b>						
Local Tax Receipts	15	21	26	30	42	46
State Tax Receipts	281	396	526	552	557	534
Federal Tax Receipts	140	166	190	198	209	218
Total Direct Gov't Revenue	436	582	742	781	808	798

Note: Details may not add to totals due to rounding.

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

## West Virginia Travel Impacts, 2011-2016p

	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>						
Destination Spending	4,581	4,699	4,502	4,375	4,127	4,013
Other Travel*	133	137	134	133	134	129
Total Direct Spending	4,713	4,836	4,636	4,509	4,261	4,141
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>						
Hotel, Motel	1,490	1,577	1,523	1,487	1,456	1,418
Campground	41	40	40	39	34	33
Private Home	796	794	788	782	688	668
Vacation Home	99	100	98	98	90	87
Day Travel	2,155	2,189	2,053	1,969	1,860	1,807
Destination Spending	4,581	4,699	4,502	4,375	4,127	4,013
<b>Visitor Spending by Commodity Purchased (\$Million)</b>						
Accommodations	462	506	506	509	535	513
Food Service	885	927	925	933	968	992
Food Stores	211	220	219	220	225	222
Local Tran. & Gas	1,323	1,298	1,240	1,197	886	815
Arts, Ent. & Rec.	286	300	293	286	290	289
Gaming	890	907	788	708	696	658
Retail Sales	525	542	531	522	527	523
Destination Spending	4,581	4,699	4,502	4,375	4,127	4,013
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>						
Accom. & Food Serv.	508	535	548	567	593	603
Arts, Ent. & Rec.	344	354	339	326	331	328
Retail**	129	132	133	135	132	139
Ground Tran.	16	17	17	17	17	18
Other Travel*	28	28	28	28	36	38
Total Direct Earnings	1,025	1,065	1,065	1,073	1,109	1,125
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>						
Accom. & Food Serv.	25.6	26.2	26.9	27.3	26.6	26.5
Arts, Ent. & Rec.	13.1	13.4	13.1	12.4	12.2	12.1
Retail**	5.2	5.2	5.3	5.3	4.9	5.0
Ground Tran.	0.5	0.6	0.6	0.6	0.5	0.5
Other Travel*	0.9	0.8	0.7	0.7	0.7	0.7
Total Direct Employment	45.3	46.2	46.6	46.2	44.9	44.9
<b>Government Revenue Generated by Travel Spending (\$Million)</b>						
Local Tax Receipts	54	59	54	50	54	52
State Tax Receipts	534	543	492	478	485	475
Federal Tax Receipts	204	208	221	221	224	224
Total Direct Gov't Revenue	793	810	768	749	762	751

Note: Estimates for 2016p are preliminary. Details may not add to totals due to rounding.

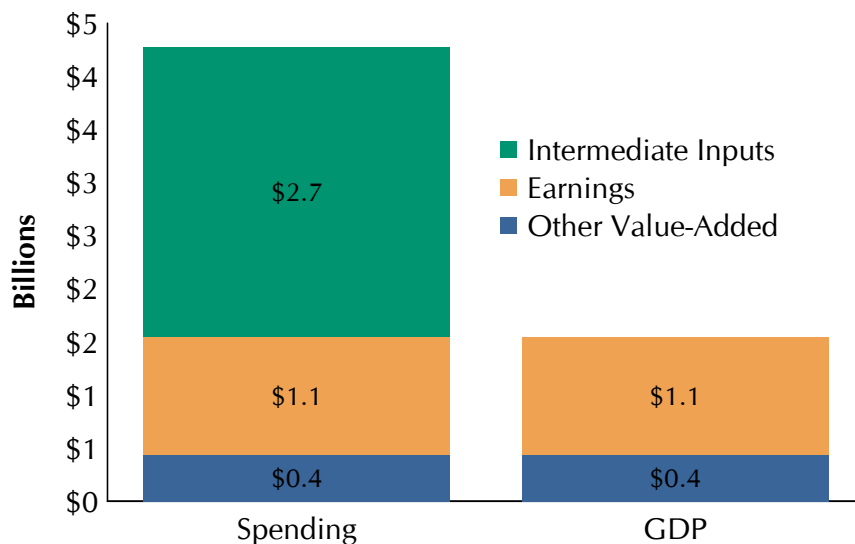
\*Other Travel includes resident air travel and travel agencies. \*\*Retail includes gasoline.

## 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 \$1.5 billion represents approximately 2 percent of total West Virginia GDP. By way of comparison, the U.S. travel industry's share of GDP was 2.7 percent (in 2015).

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, 2016p**  
(\$ Billions)

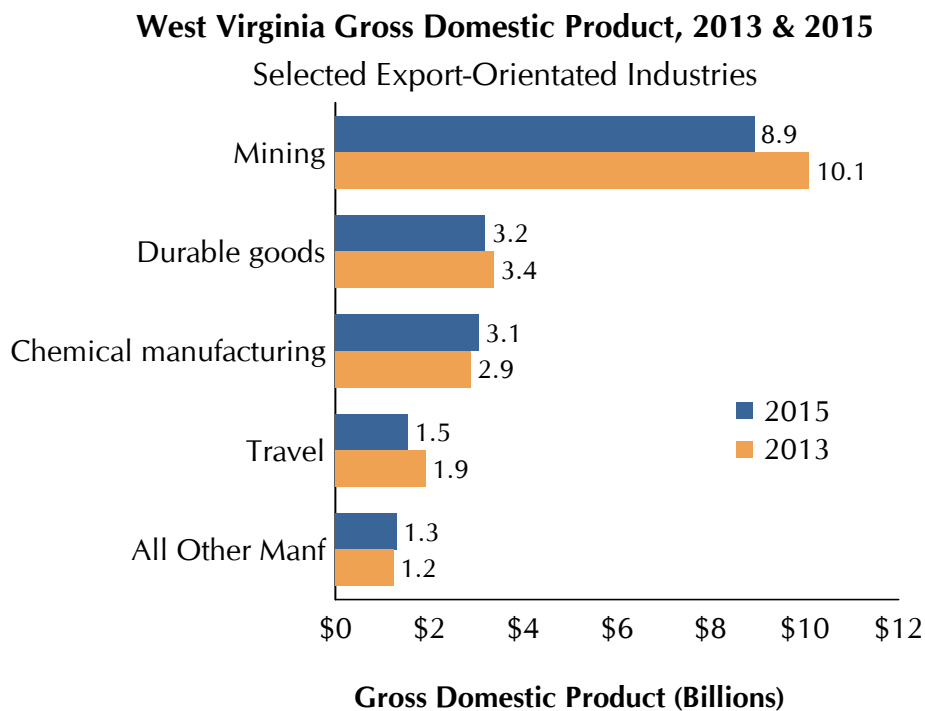


Source: Dean Runyan Associates and Bureau of Economic Analysis.

## Gross Domestic Product of West Virginia Export-Orientated Industries

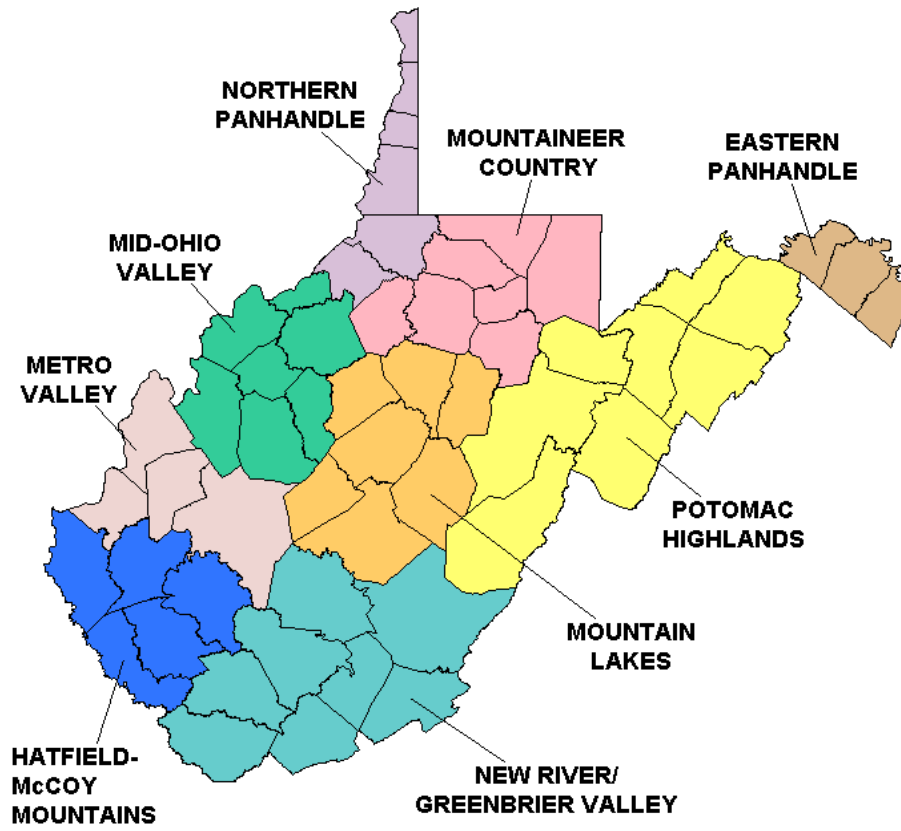
Export-orientated industries are those industries that primarily market their products and services to other regions, states, or nations. Mining, manufacturing, and chemicals are the best examples of export-orientated industries. Clearly, there are cases in each of these three sectors where the products 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 2013 and 2015 - data for 2016 is not yet available for the comparison industries.



Source: Dean Runyan Associates and Bureau of Economic Analysis.

# IV. REGIONAL VISITOR IMPACTS 2008-2016p





The tables in this section provide detailed estimates for the regions of West Virginia for 2008-2016p. 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

## Northern Panhandle Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	874	801	853	889	819	773	739	661
Other Travel*	5	3	4	5	5	5	5	6
Total Direct Spending	879	804	857	894	824	778	744	667
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	137	118	126	137	134	132	130	112
Campground	0	1	1	1	1	1	1	1
Private Home	57	54	58	57	55	54	49	48
Vacation Home	5	4	5	4	4	4	4	4
Day Travel	675	625	664	689	625	582	556	496
Destination Spending	874	801	853	889	819	773	739	661
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	37	38	41	46	47	47	49	41
Food Service	164	181	188	199	198	198	202	188
Food Stores	33	35	37	40	39	39	39	35
Local Tran. & Gas	104	89	107	105	100	96	69	63
Arts, Ent. & Rec.	13	19	19	20	20	19	19	18
Gaming	435.6	344.8	363.0	376.8	315.6	275.5	262.9	227.6
Retail Sales	87	95	98	103	100	97	97	88
Destination Spending	874	801	853	889	819	773	739	661
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	75	83	84	89	91	94	97	91
Arts, Ent. & Rec.	80	75	80	82	73	65	63	55
Retail**	17	19	19	20	20	20	20	19
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	2	2	2	2	3	2	3	3
Total Direct Earnings	174	179	186	194	187	181	183	169
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	4.8	5.3	5.3	5.5	5.7	5.7	5.7	5.3
Arts, Ent. & Rec.	2.9	2.6	2.7	2.7	2.4	2.1	2.0	1.7
Retail**	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Employment	8.7	8.7	8.8	9.1	9.0	8.7	8.5	7.8
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	12	10	10	10	10	9	10	9
State Tax Receipts	173	145	133	139	121	120	119	111
Total Direct Gov't Revenue	185	155	143	149	131	129	129	120

Details may not add to totals due to rounding.

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

## Mid-Ohio Valley Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	193	178	196	202	197	204	175	168
Other Travel*	5	5	2	4	4	4	4	5
Total Direct Spending	198	182	198	206	201	208	179	173
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	65	58	62	70	67	78	66	64
Campground	2	2	2	2	2	2	1	1
Private Home	67	64	71	70	69	66	59	57
Vacation Home	7	7	8	8	8	7	7	6
Day Travel	52	47	53	53	51	51	42	40
Destination Spending	193	178	196	202	197	204	175	168
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	18	16	17	20	20	25	23	22
Food Service	32	32	33	35	35	39	38	38
Food Stores	9	9	9	10	10	10	10	10
Local Tran. & Gas	97	83	100	97	93	89	64	59
Arts, Ent. & Rec.	15	15	15	16	16	17	16	16
Gaming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Retail Sales	23	23	23	24	24	25	24	24
Destination Spending	193	178	196	202	197	204	175	168
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	18	18	18	19	20	23	22	23
Arts, Ent. & Rec.	7	9	8	9	9	10	10	10
Retail**	7	7	7	7	8	8	7	8
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	3	2	1	2	2	2	2	2
Total Direct Earnings	35	36	34	38	38	43	42	43
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	1.1	1.0	1.0	1.1	1.1	1.2	1.1	1.1
Arts, Ent. & Rec.	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Retail**	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.0	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	2.0	1.9	1.8	1.9	1.9	2.1	1.9	1.9
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	1	1	2	2	2	2	2	2
State Tax Receipts	13	12	12	13	12	13	13	12
Total Direct Gov't Revenue	14	14	14	15	14	15	15	14

Details may not add to totals due to rounding.

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

## Metro Valley Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	731	733	781	802	739	710	695	683
Other Travel*	82	76	81	83	82	81	80	76
Total Direct Spending	814	808	862	885	821	792	775	759
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	314	333	344	362	309	290	321	320
Campground	1	1	1	1	1	1	1	1
Private Home	178	168	186	185	189	190	163	157
Vacation Home	5	5	6	6	6	6	5	5
Day Travel	233	225	246	248	234	225	206	201
Destination Spending	731	733	781	802	739	710	695	683
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	88	97	97	106	91	87	108	105
Food Service	120	134	133	141	127	124	139	145
Food Stores	25	27	27	29	26	25	28	28
Local Tran. & Gas	333	299	349	345	333	324	255	241
Arts, Ent. & Rec.	49	54	52	54	48	46	51	51
Gaming	41.8	41.5	42.2	44.0	38.7	33.9	36.3	35.8
Retail Sales	74	81	80	83	75	71	77	77
Destination Spending	731	733	781	802	739	710	695	683
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	76	86	83	88	80	79	87	89
Arts, Ent. & Rec.	33	43	40	42	38	36	40	41
Retail**	19	21	21	22	21	21	21	22
Ground Tran.	15	15	16	17	17	17	17	17
Other Travel*	11	11	10	10	9	10	15	15
Total Direct Earnings	155	176	171	177	164	162	180	185
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	3.7	4.0	3.7	3.8	3.4	3.4	3.6	3.6
Arts, Ent. & Rec.	1.6	1.9	1.8	1.9	1.8	1.7	1.8	1.9
Retail**	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Ground Tran.	0.6	0.5	0.5	0.6	0.6	0.6	0.5	0.5
Other Travel*	0.4	0.3	0.3	0.3	0.2	0.2	0.2	0.2
Total Direct Employment	7.1	7.5	7.1	7.4	6.9	6.7	6.9	7.1
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	6	7	7	8	7	7	9	9
State Tax Receipts	58	59	59	61	56	54	57	58
Total Direct Gov't Revenue	64	66	66	69	63	61	66	67

Details may not add to totals due to rounding.

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

## Mountain Lakes Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	197	191	218	214	208	208	176	172
Other Travel*	2	1	2	1	2	1	2	2
Total Direct Spending	198	191	219	216	210	209	178	174
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	79	81	96	93	89	90	75	75
Campground	12	12	13	13	13	13	12	11
Private Home	45	41	45	46	45	45	39	38
Vacation Home	12	11	12	13	12	12	11	11
Day Travel	49	45	51	51	49	48	39	38
Destination Spending	197	191	218	214	208	208	176	172
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	24	26	29	29	29	31	28	28
Food Service	29	32	35	34	34	35	33	35
Food Stores	11	11	12	12	12	12	12	12
Local Tran. & Gas	97	83	100	98	93	89	65	59
Arts, Ent. & Rec.	16	17	18	18	17	17	16	17
Gaming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Retail Sales	21	22	24	23	23	23	22	22
Destination Spending	197	191	218	214	208	208	176	172
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	19	21	22	22	23	24	23	24
Arts, Ent. & Rec.	9	12	12	12	12	13	12	13
Retail**	7	7	8	7	8	8	7	8
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	1	0	1	1	1	1	1	1
Total Direct Earnings	36	41	43	43	43	45	44	45
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	1.1	1.2	1.2	1.2	1.2	1.2	1.1	1.1
Arts, Ent. & Rec.	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Retail**	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Employment	2.0	2.1	2.2	2.1	2.1	2.2	2.0	2.0
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	2	2	2	2	2	2	2	2
State Tax Receipts	12	13	14	13	13	13	12	12
Total Direct Gov't Revenue	14	15	16	16	15	15	14	14

Details may not add to totals due to rounding.

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

## New River/Greenbrier Valley Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	669	580	659	686	703	664	596	577
Other Travel*	8	7	9	8	8	8	8	9
Total Direct Spending	677	587	667	694	711	672	604	586
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	375	305	352	378	405	372	342	334
Campground	7	7	8	8	8	7	6	6
Private Home	129	127	139	138	131	132	116	112
Vacation Home	12	12	13	13	13	13	12	12
Day Travel	147	129	147	149	146	140	119	114
Destination Spending	669	580	659	686	703	664	596	577
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	119	93	107	119	133	124	122	118
Food Service	123	112	122	130	137	130	128	132
Food Stores	29	27	29	31	32	31	30	30
Local Tran. & Gas	235	200	241	236	225	217	156	142
Arts, Ent. & Rec.	85	71	75	81	83	77	76	75
Gaming	0.0	6.9	8.1	9.5	12.4	10.7	9.7	8.1
Retail Sales	78	70	75	79	81	75	73	72
Destination Spending	669	580	659	686	703	664	596	577
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	101	86	93	102	111	108	109	109
Arts, Ent. & Rec.	53	56	57	62	65	63	63	62
Retail**	20	20	20	21	22	21	20	21
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	4	4	4	4	4	4	4	5
Total Direct Earnings	178	165	176	189	202	196	197	197
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	4.2	3.4	3.6	3.8	4.2	4.0	3.9	3.9
Arts, Ent. & Rec.	2.2	2.1	2.1	2.1	2.3	2.1	2.0	2.0
Retail**	0.8	0.7	0.8	0.8	0.8	0.8	0.7	0.7
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.2	0.1	0.2	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	7.4	6.4	6.6	6.8	7.4	7.0	6.7	6.7
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	5	5	7	7	8	7	7	7
State Tax Receipts	44	41	45	46	47	45	44	43
Total Direct Gov't Revenue	49	47	51	53	55	52	51	50

Details may not add to totals due to rounding.

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

## Potomac Highlands Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	292	273	276	276	285	287	266	272
Other Travel*	2	2	2	2	2	2	2	2
Total Direct Spending	294	275	279	278	287	289	269	274
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	146	134	127	126	138	141	136	143
Campground	6	7	7	7	7	7	6	6
Private Home	46	44	48	49	47	47	42	41
Vacation Home	31	30	33	33	32	32	30	29
Day Travel	62	58	62	61	61	60	53	52
Destination Spending	292	273	276	276	285	287	266	272
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	56	51	47	48	54	57	57	60
Food Service	58	57	54	54	58	59	59	64
Food Stores	25	24	25	25	26	26	26	26
Local Tran. & Gas	80	68	82	80	76	73	53	48
Arts, Ent. & Rec.	34	33	31	30	32	32	32	33
Gaming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Retail Sales	41	40	39	39	40	40	39	40
Destination Spending	292	273	276	276	285	287	266	272
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	41	39	36	36	40	43	43	44
Arts, Ent. & Rec.	15	19	17	17	18	19	19	20
Retail**	12	12	12	12	12	13	12	13
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	1	1	1	1	1	1	1	1
Total Direct Earnings	69	72	66	65	72	75	76	79
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	2.3	2.2	2.0	2.0	2.1	2.2	2.1	2.2
Arts, Ent. & Rec.	1.0	1.1	1.0	1.0	1.1	1.1	1.1	1.2
Retail**	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.5
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Direct Employment	3.9	3.8	3.5	3.5	3.7	3.8	3.7	3.9
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	3	3	4	4	4	4	4	4
State Tax Receipts	18	18	17	17	17	18	17	18
Total Direct Gov't Revenue	22	21	21	20	21	21	21	21

Details may not add to totals due to rounding.

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

## Eastern Panhandle Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	899	915	973	974	923	904	905	937
Other Travel*	3	5	5	5	5	5	5	5
Total Direct Spending	902	920	978	979	928	909	910	942
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	128	111	119	115	108	110	112	118
Campground	1	1	1	1	1	1	1	1
Private Home	52	55	59	61	62	62	57	57
Vacation Home	10	10	11	11	12	12	11	11
Day Travel	708	738	783	786	741	720	724	750
Destination Spending	899	915	973	974	923	904	905	937
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	41	35	37	36	36	38	41	43
Food Service	176	192	200	203	210	220	234	258
Food Stores	38	40	43	43	44	46	49	51
Local Tran. & Gas	83	71	86	84	80	77	56	51
Arts, Ent. & Rec.	24	23	23	23	22	23	23	24
Gaming	438.2	448.8	476.1	476.9	421.2	387.5	386.9	386.5
Retail Sales	98	105	108	108	110	112	116	123
Destination Spending	899	915	973	974	923	904	905	937
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	87	93	95	95	100	108	115	129
Arts, Ent. & Rec.	80	92	93	92	87	83	84	87
Retail**	19	20	20	20	21	22	22	25
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	2	3	3	2	3	2	3	3
Total Direct Earnings	188	208	211	209	210	215	223	243
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	5.0	4.8	4.8	4.7	5.1	5.4	4.7	5.1
Arts, Ent. & Rec.	3.0	3.2	3.1	3.1	2.9	2.8	2.8	2.8
Retail**	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.9
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	8.8	8.9	8.8	8.6	8.9	9.1	8.4	8.9
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	10	12	16	17	14	12	13	12
State Tax Receipts	206	209	214	214	186	174	181	182
Total Direct Gov't Revenue	216	221	230	231	200	186	194	195

Details may not add to totals due to rounding.

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



## Mountaineer Country Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	348	372	445	477	460	461	437	410
Other Travel*	7	7	7	7	8	8	8	8
Total Direct Spending	355	380	452	485	467	469	445	418
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	149	185	238	268	253	257	254	233
Campground	3	3	3	3	3	3	2	2
Private Home	105	96	101	100	101	101	91	90
Vacation Home	9	8	9	9	9	9	8	8
Day Travel	83	81	94	96	93	92	81	77
Destination Spending	348	372	445	477	460	461	437	410
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	47	61	79	93	91	95	101	90
Food Service	66	81	94	105	102	104	108	107
Food Stores	16	19	22	24	23	24	24	23
Local Tran. & Gas	143	122	147	144	137	132	95	87
Arts, Ent. & Rec.	32	38	43	47	45	45	47	45
Gaming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Retail Sales	45	52	59	64	61	61	62	59
Destination Spending	348	372	445	477	460	461	437	410
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	43	55	65	73	73	77	84	83
Arts, Ent. & Rec.	18	27	30	33	32	33	34	34
Retail**	12	14	15	16	16	16	16	16
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	3	2	2	3	3	2	3	3
Total Direct Earnings	76	98	112	124	123	128	137	136
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	2.4	2.8	3.2	3.5	3.5	3.5	3.6	3.5
Arts, Ent. & Rec.	0.8	1.1	1.2	1.2	1.2	1.2	1.3	1.2
Retail**	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	3.8	4.5	5.1	5.5	5.4	5.5	5.5	5.3
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	3	4	6	6	6	6	7	6
State Tax Receipts	22	25	28	30	29	30	30	29
Total Direct Gov't Revenue	25	29	34	36	35	36	37	35

Details may not add to totals due to rounding.

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

## Hatfield-McCoy Mountains Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Total Direct Travel Spending (\$Million)</b>								
Destination Spending	164	151	179	178	168	163	139	131
Other Travel*	17	20	21	22	19	19	18	16
Total Direct Spending	181	171	201	200	187	182	157	148
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>								
Hotel, Motel	13	13	28	28	21	18	21	19
Campground	5	5	6	6	6	5	4	4
Private Home	91	82	88	88	87	86	71	67
Vacation Home	3	3	3	3	3	3	2	2
Day Travel	53	47	55	54	52	50	40	38
Destination Spending	164	151	179	178	168	163	139	131
<b>Visitor Spending by Commodity Purchased (\$Million)</b>								
Accommodations	3	4	7	7	6	5	7	6
Food Service	21	23	25	26	25	25	26	26
Food Stores	6	6	6	7	6	6	6	6
Local Tran. & Gas	108	92	111	109	103	100	72	65
Arts, Ent. & Rec.	9	10	11	11	10	10	10	10
Gaming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Retail Sales	17	17	19	19	18	17	18	17
Destination Spending	164	151	179	178	168	163	139	131
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>								
Accom. & Food Serv.	9	10	12	12	11	11	11	12
Arts, Ent. & Rec.	4	5	5	5	5	5	5	5
Retail**	6	6	6	7	7	7	6	7
Ground Tran.	0	0	0	0	0	0	0	0
Other Travel*	2	3	3	3	3	3	5	5
Total Direct Earnings	21	23	26	26	25	25	28	28
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>								
Accom. & Food Serv.	0.6	0.6	0.7	0.7	0.7	0.7	0.6	0.6
Arts, Ent. & Rec.	0.2	0.2	0.3	0.2	0.2	0.2	0.3	0.3
Retail**	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Direct Employment	1.2	1.2	1.3	1.3	1.2	1.3	1.2	1.2
<b>Government Revenue Generated by Travel Spending (\$Million)</b>								
Local Tax Receipts	1	1	1	1	1	1	1	1
State Tax Receipts	10	11	11	11	11	11	10	10
Total Direct Gov't Revenue	11	12	12	12	12	11	11	11

Details may not add to totals due to rounding.

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

## West Virginia Regional Travel Impacts, 2016p

	Northern Panhandle	Mid-Ohio Valley	Metro Valley	Mountain Lakes
<b>Total Direct Travel Spending (\$Million)</b>				
Destination Spending	661.3	168.3	683.5	172.0
Other Travel*	5.7	4.5	75.9	1.7
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>				
Campground	0.5	1.3	0.7	11.1
Day Travel	496.5	40.0	200.8	37.7
Hotel, Motel	112.4	63.7	319.8	74.9
Private Home	48.4	56.9	157.5	37.8
Vacation Home	3.6	6.5	4.7	10.5
<b>Visitor Spending by Commodity Purchased (\$Million)</b>				
Accommodations	41.1	21.9	105.4	28.1
Arts, Ent. & Rec.	18.3	16.1	51.4	16.5
Food Service	187.8	38.4	144.6	34.7
Food Stores	35.3	9.8	27.9	12.2
Gaming	227.6	0.0	35.8	0.0
Local Tran. & Gas	63.3	58.7	240.9	58.8
Retail Sales	87.9	23.5	77.5	21.6
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>				
Accom. & Food Serv.	91.5	22.8	89.5	23.5
Arts, Ent. & Rec.	55.5	10.1	41.2	13.0
Ground Tran.	0.0	0.0	17.5	0.0
Other Travel*	2.9	2.3	14.9	0.9
Retail**	18.8	7.8	22.3	7.7
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>				
Accom. & Food Serv.	5.3	1.1	3.6	1.1
Arts, Ent. & Rec.	1.7	0.5	1.9	0.6
Ground Tran.	0.0	0.0	0.5	0.0
Other Travel*	0.0	0.1	0.2	0.0
Retail**	0.7	0.3	0.8	0.3
<b>Government Revenue Generated by Travel Spending (\$Million)</b>				
Federal Tax Receipts				
Local Tax Receipts	8.9	2.0	8.9	2.0
State Tax Receipts	111.5	12.3	57.7	12.2

Details may not add to totals due to rounding.

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

## West Virginia Regional Travel Impacts, 2016p

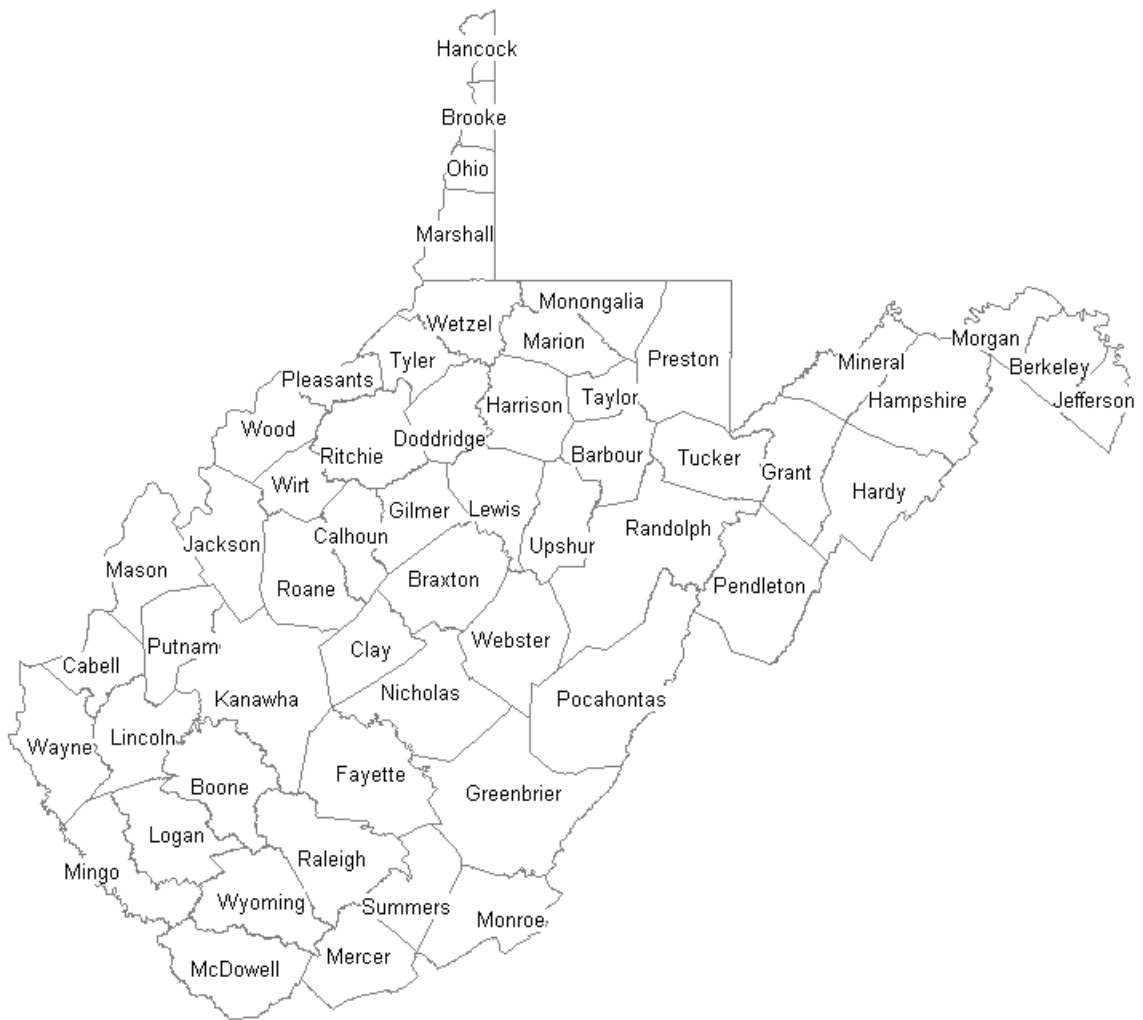
	New River/ Greenbrier	Potomac Highlands	Eastern Panhandle	Mountaineer Country	Hatfield- McCoy Mts.
<b>Total Direct Travel Spending (\$Million)</b>					
Destination Spending	577.4	271.5	936.9	410.3	131.2
Other Travel*	8.9	2.4	5.4	7.9	16.4
<b>Visitor Spending by Type of Traveler Accommodation (\$Million)</b>					
Campground	6.3	5.9	0.6	2.3	4.3
Day Travel	114.1	52.3	750.5	76.7	38.0
Hotel, Motel	333.7	143.3	118.4	232.7	19.1
Private Home	111.7	41.2	56.8	90.5	67.5
Vacation Home	11.5	28.9	10.6	8.1	2.3
<b>Visitor Spending by Commodity Purchased (\$Million)</b>					
Accommodations	118.2	59.6	42.6	90.2	6.3
Arts, Ent. & Rec.	74.8	33.0	24.3	44.6	10.1
Food Service	131.7	64.1	258.3	106.5	26.0
Food Stores	29.8	26.3	51.2	23.0	6.3
Gaming	8.1	0.0	386.5	0.0	0.0
Local Tran. & Gas	142.3	48.2	50.6	86.8	65.4
Retail Sales	72.4	40.2	123.3	59.2	17.1
<b>Industry Earnings Generated by Travel Spending (\$Million)</b>					
Accom. & Food Serv.	108.8	44.2	128.8	82.7	11.6
Arts, Ent. & Rec.	62.3	20.2	86.6	34.0	5.1
Ground Tran.	0.0	0.0	0.0	0.0	0.0
Other Travel*	4.6	1.3	2.8	2.9	4.9
Retail**	21.4	13.2	24.6	15.9	6.7
<b>Industry Employment Generated by Travel Spending (Thousand Jobs)</b>					
Accom. & Food Serv.	3.9	2.2	5.1	3.5	0.6
Arts, Ent. & Rec.	2.0	1.2	2.8	1.2	0.3
Ground Tran.	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.1	0.0	0.1	0.1	0.1
Retail**	0.7	0.5	0.9	0.6	0.3
<b>Government Revenue Generated by Travel Spending (\$Million)</b>					
Federal Tax Receipts					
Local Tax Receipts	6.7	3.8	12.5	6.1	0.9
State Tax Receipts	42.8	17.7	182.2	28.6	10.1

Details may not add to totals due to rounding.

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

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# V. COUNTY TRAVEL IMPACTS 2008-2016p



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, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Barbour</b>								
Direct Spending (\$Million)	16.0	15.0	17.0	17.0	17.0	16.5	14.4	13.8
Earnings (\$Million)	2.0	2.0	2.0	2.0	3.0	2.6	2.7	2.8
Employment (jobs)	140	150	150	150	150	150	160	160
Local Govt. Revenue (\$000)	86	123	176	182	152	129	125	117
State Govt. Revenue (\$000)	987	1,030	1,041	1,019	997	1,007	989	962
<b>Berkeley</b>								
Direct Spending (\$Million)	139.0	122.0	133.0	130.0	123.0	123.3	112.1	108.5
Earnings (\$Million)	28.0	27.0	26.0	25.0	25.0	25.8	26.7	27.3
Employment (jobs)	1,340	1,230	1,190	1,170	1,130	1,200	1,240	1,240
Local Govt. Revenue (\$000)	973	888	946	923	793	815	936	871
State Govt. Revenue (\$000)	8,825	8,272	8,263	7,991	7,577	7,741	7,717	7,544
<b>Boone</b>								
Direct Spending (\$Million)	34.0	30.0	34.0	34.0	32.0	31.4	24.9	23.3
Earnings (\$Million)	3.0	3.0	3.0	3.0	3.0	3.1	3.0	3.2
Employment (jobs)	160	160	160	150	160	160	150	150
Local Govt. Revenue (\$000)	79	109	164	172	138	110	104	97
State Govt. Revenue (\$000)	2,125	2,102	2,091	2,055	2,021	2,053	1,969	1,890
<b>Braxton</b>								
Direct Spending (\$Million)	37.0	37.0	41.0	40.0	39.0	37.6	31.1	30.6
Earnings (\$Million)	6.0	8.0	8.0	8.0	8.0	8.0	7.4	8.0
Employment (jobs)	320	360	350	330	320	320	280	300
Local Govt. Revenue (\$000)	161	220	282	391	358	315	282	285
State Govt. Revenue (\$000)	2,301	2,487	2,508	2,406	2,363	2,325	2,170	2,160
<b>Brooke</b>								
Direct Spending (\$Million)	18.0	16.0	18.0	18.0	17.0	17.1	14.9	14.3
Earnings (\$Million)	5.0	5.0	4.0	5.0	5.0	4.9	4.9	5.0
Employment (jobs)	210	200	180	170	180	180	170	170
Local Govt. Revenue (\$000)	93	134	196	205	168	137	149	140
State Govt. Revenue (\$000)	1,153	1,089	1,088	1,074	1,062	1,074	1,050	1,020
<b>Cabell</b>								
Direct Spending (\$Million)	126.0	134.0	140.0	143.0	133.0	136.2	125.6	119.8
Earnings (\$Million)	27.0	34.0	32.0	33.0	31.0	33.6	34.9	34.8
Employment (jobs)	1,290	1,540	1,430	1,470	1,400	1,490	1,470	1,450
Local Govt. Revenue (\$000)	1,052	1,354	1,351	1,819	1,609	1,736	1,802	1,681
State Govt. Revenue (\$000)	8,035	9,070	8,802	8,894	8,298	8,677	8,689	8,379
<b>Calhoun</b>								
Direct Spending (\$Million)	7.0	7.0	8.0	8.0	7.0	7.2	6.2	5.9
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.2	1.2	1.2
Employment (jobs)	70	70	70	70	70	70	80	70
Local Govt. Revenue (\$000)	46	68	103	107	86	69	65	61
State Govt. Revenue (\$000)	454	454	454	440	430	433	421	409



## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Clay</b>								
Direct Spending (\$Million)	9.0	8.0	9.0	9.0	8.0	8.2	6.4	6.0
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	0.8	0.7	0.8
Employment (jobs)	40	40	30	30	30	40	30	30
Local Govt. Revenue (\$000)	49	71	105	110	89	72	68	63
State Govt. Revenue (\$000)	553	553	550	539	528	537	515	493
<b>Doddridge</b>								
Direct Spending (\$Million)	6.0	6.0	7.0	7.0	7.0	6.6	6.1	5.9
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.3	1.4	1.4
Employment (jobs)	50	50	50	50	50	50	50	50
Local Govt. Revenue (\$000)	49	71	105	110	89	72	68	64
State Govt. Revenue (\$000)	383	392	393	381	376	377	377	369
<b>Fayette</b>								
Direct Spending (\$Million)	71.0	67.0	78.0	80.0	78.0	75.5	65.5	65.0
Earnings (\$Million)	12.0	14.0	15.0	16.0	16.0	16.1	17.1	18.2
Employment (jobs)	710	730	780	800	810	780	770	790
Local Govt. Revenue (\$000)	553	621	783	848	809	739	701	704
State Govt. Revenue (\$000)	4,474	4,587	4,896	4,936	4,889	4,810	4,675	4,683
<b>Gilmer</b>								
Direct Spending (\$Million)	8.0	8.0	9.0	9.0	8.0	8.3	7.3	7.0
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.4	1.4	1.4
Employment (jobs)	80	80	80	80	80	80	70	70
Local Govt. Revenue (\$000)	62	89	130	136	111	91	86	80
State Govt. Revenue (\$000)	494	504	504	490	475	477	465	452
<b>Grant</b>								
Direct Spending (\$Million)	17.0	16.0	18.0	18.0	17.0	16.9	14.4	13.7
Earnings (\$Million)	2.0	2.0	2.0	2.0	2.0	2.4	2.4	2.5
Employment (jobs)	140	140	140	140	140	140	140	130
Local Govt. Revenue (\$000)	65	91	133	139	115	94	90	84
State Govt. Revenue (\$000)	1,060	1,071	1,069	1,041	1,018	1,027	1,003	972
<b>Greenbrier</b>								
Direct Spending (\$Million)	215.0	183.0	212.0	239.0	230.0	225.5	215.3	199.4
Earnings (\$Million)	88.0	80.0	87.0	100.0	99.0	100.0	101.8	97.1
Employment (jobs)	2,480	2,010	2,150	2,450	2,410	2,340	2,280	2,270
Local Govt. Revenue (\$000)	1,671	1,621	2,032	2,392	2,299	2,262	2,217	2,028
State Govt. Revenue (\$000)	14,297	13,952	16,124	18,148	17,407	16,935	16,673	15,430
<b>Hampshire</b>								
Direct Spending (\$Million)	36.0	35.0	38.0	37.0	36.0	35.9	32.4	31.3
Earnings (\$Million)	6.0	7.0	7.0	6.0	6.0	6.6	6.8	7.0
Employment (jobs)	390	400	380	370	360	370	360	370
Local Govt. Revenue (\$000)	104	135	174	174	145	127	140	131
State Govt. Revenue (\$000)	2,180	2,323	2,289	2,159	2,073	2,085	2,081	2,033

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Hancock</b>								
Direct Spending (\$Million)	427.0	369.0	384.0	382.0	356.0	336.0	343.7	303.8
Earnings (\$Million)	89.0	84.0	85.0	83.0	81.0	77.5	83.9	75.8
Employment (jobs)	4,620	4,510	4,480	4,390	4,430	4,330	4,570	4,130
Local Govt. Revenue (\$000)	6,122	5,185	5,141	5,100	4,630	4,401	4,600	4,024
State Govt. Revenue (\$000)	93,210	75,689	72,088	74,557	67,351	66,532	62,607	56,197
<b>Hardy</b>								
Direct Spending (\$Million)	21.0	23.0	23.0	22.0	23.0	23.4	22.9	22.4
Earnings (\$Million)	4.0	5.0	4.0	4.0	4.0	4.7	5.2	5.4
Employment (jobs)	250	310	260	250	290	300	320	310
Local Govt. Revenue (\$000)	106	161	191	233	243	231	261	250
State Govt. Revenue (\$000)	1,293	1,514	1,377	1,293	1,350	1,369	1,442	1,425
<b>Harrison</b>								
Direct Spending (\$Million)	102.0	116.0	130.0	142.0	142.0	149.4	138.2	118.1
Earnings (\$Million)	24.0	32.0	34.0	38.0	39.0	43.1	45.1	41.4
Employment (jobs)	1,110	1,380	1,450	1,550	1,610	1,720	1,680	1,510
Local Govt. Revenue (\$000)	1,002	1,388	1,669	1,964	1,988	2,157	2,429	1,915
State Govt. Revenue (\$000)	6,402	7,600	8,083	8,758	8,798	9,304	9,147	8,019
<b>Jackson</b>								
Direct Spending (\$Million)	44.0	40.0	46.0	46.0	43.0	44.4	36.9	37.3
Earnings (\$Million)	7.0	7.0	7.0	7.0	7.0	7.6	7.2	8.0
Employment (jobs)	400	390	400	400	370	440	390	410
Local Govt. Revenue (\$000)	255	273	343	362	292	332	294	317
State Govt. Revenue (\$000)	2,792	2,794	2,859	2,836	2,655	2,847	2,685	2,731
<b>Jefferson</b>								
Direct Spending (\$Million)	731.0	770.0	815.0	819.0	775.0	756.3	769.5	805.0
Earnings (\$Million)	151.0	173.0	177.0	176.0	177.0	181.0	188.3	205.7
Employment (jobs)	6,970	7,180	7,170	7,010	7,290	7,430	6,660	7,150
Local Govt. Revenue (\$000)	8,626	10,838	14,711	15,953	13,259	11,047	11,506	11,354
State Govt. Revenue (\$000)	194,932	198,678	204,099	204,246	176,384	164,735	171,889	172,789
<b>Kanawha</b>								
Direct Spending (\$Million)	590.0	586.0	623.0	643.0	592.0	561.9	571.7	565.5
Earnings (\$Million)	117.0	129.0	127.0	132.0	120.0	115.2	131.0	136.3
Employment (jobs)	5,100	5,280	5,030	5,210	4,830	4,500	4,720	4,930
Local Govt. Revenue (\$000)	4,669	5,194	5,482	5,947	5,482	5,011	6,873	6,938
State Govt. Revenue (\$000)	44,004	43,881	44,231	45,768	41,703	39,688	42,952	43,695
<b>Lewis</b>								
Direct Spending (\$Million)	42.0	42.0	48.0	47.0	47.0	50.0	41.8	43.5
Earnings (\$Million)	10.0	12.0	12.0	12.0	13.0	14.3	13.4	13.7
Employment (jobs)	490	510	550	540	550	610	550	570
Local Govt. Revenue (\$000)	549	600	713	723	716	784	669	698
State Govt. Revenue (\$000)	2,700	2,844	3,027	2,957	2,948	3,180	2,845	2,941

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Lincoln</b>								
Direct Spending (\$Million)	18.0	16.0	18.0	18.0	18.0	17.3	14.6	13.9
Earnings (\$Million)	2.0	2.0	2.0	2.0	2.0	2.5	2.5	2.6
Employment (jobs)	140	140	140	130	140	140	130	130
Local Govt. Revenue (\$000)	54	81	122	128	103	82	77	72
State Govt. Revenue (\$000)	1,090	1,106	1,104	1,087	1,070	1,087	1,053	1,025
<b>Logan</b>								
Direct Spending (\$Million)	52.0	53.0	64.0	64.0	57.0	54.2	48.3	45.3
Earnings (\$Million)	5.0	8.0	9.0	9.0	8.0	7.5	8.0	8.1
Employment (jobs)	240	340	410	400	340	320	340	340
Local Govt. Revenue (\$000)	135	269	439	450	325	260	337	307
State Govt. Revenue (\$000)	3,282	3,697	4,007	3,926	3,598	3,530	3,622	3,467
<b>Marion</b>								
Direct Spending (\$Million)	56.0	68.0	77.0	84.0	75.0	80.0	74.0	70.7
Earnings (\$Million)	10.0	17.0	18.0	20.0	18.0	20.8	21.5	21.4
Employment (jobs)	530	810	840	960	890	1,010	1,010	960
Local Govt. Revenue (\$000)	310	446	871	1,038	846	928	1,093	1,019
State Govt. Revenue (\$000)	3,494	4,593	4,821	5,191	4,694	5,080	5,076	4,902
<b>Marshall</b>								
Direct Spending (\$Million)	28.0	26.0	29.0	29.0	32.0	34.8	30.2	28.3
Earnings (\$Million)	6.0	7.0	7.0	7.0	9.0	11.0	11.0	10.8
Employment (jobs)	260	250	250	260	370	430	410	380
Local Govt. Revenue (\$000)	89	132	195	208	256	292	316	283
State Govt. Revenue (\$000)	1,739	1,769	1,768	1,743	1,967	2,177	2,100	1,999
<b>Mason</b>								
Direct Spending (\$Million)	23.0	22.0	24.0	24.0	24.0	23.3	20.1	19.3
Earnings (\$Million)	3.0	4.0	4.0	4.0	4.0	4.0	4.1	4.2
Employment (jobs)	230	230	230	230	250	240	230	230
Local Govt. Revenue (\$000)	100	146	214	224	183	149	141	132
State Govt. Revenue (\$000)	1,450	1,472	1,472	1,443	1,420	1,434	1,402	1,365
<b>McDowell</b>								
Direct Spending (\$Million)	27.0	24.0	28.0	27.0	26.0	25.5	20.7	19.5
Earnings (\$Million)	3.0	3.0	3.0	3.0	3.0	3.1	3.0	3.1
Employment (jobs)	180	170	160	160	170	160	150	150
Local Govt. Revenue (\$000)	130	195	291	304	246	197	186	174
State Govt. Revenue (\$000)	1,693	1,704	1,691	1,657	1,625	1,644	1,579	1,517
<b>Mercer</b>								
Direct Spending (\$Million)	111.0	92.0	102.0	101.0	115.0	111.5	97.4	93.8
Earnings (\$Million)	21.0	18.0	18.0	18.0	24.0	23.9	23.5	24.0
Employment (jobs)	1,130	930	900	880	1,140	1,110	1,100	1,090
Local Govt. Revenue (\$000)	863	646	739	760	1,076	1,022	1,122	1,072
State Govt. Revenue (\$000)	7,077	6,336	6,356	6,247	7,212	7,157	6,916	6,745

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Mineral</b>								
Direct Spending (\$Million)	21.0	21.0	23.0	22.0	22.0	22.0	19.9	19.6
Earnings (\$Million)	4.0	4.0	4.0	4.0	4.0	4.4	4.5	4.7
Employment (jobs)	250	250	240	240	250	260	250	260
Local Govt. Revenue (\$000)	120	160	268	276	247	216	208	201
State Govt. Revenue (\$000)	1,311	1,345	1,376	1,337	1,336	1,335	1,311	1,305
<b>Mingo</b>								
Direct Spending (\$Million)	28.0	23.0	29.0	29.0	29.0	28.1	24.0	22.6
Earnings (\$Million)	4.0	3.0	4.0	4.0	5.0	4.7	4.6	4.6
Employment (jobs)	230	180	240	230	240	250	240	240
Local Govt. Revenue (\$000)	117	123	222	234	198	168	163	152
State Govt. Revenue (\$000)	1,784	1,591	1,815	1,792	1,771	1,797	1,747	1,681
<b>Monongalia</b>								
Direct Spending (\$Million)	130.0	130.0	171.0	185.0	178.0	170.2	172.1	170.2
Earnings (\$Million)	32.0	36.0	48.0	53.0	52.0	51.0	56.8	58.7
Employment (jobs)	1,490	1,570	2,040	2,210	2,170	2,020	2,160	2,170
Local Govt. Revenue (\$000)	1,165	1,490	2,235	2,570	2,471	2,346	2,647	2,571
State Govt. Revenue (\$000)	8,289	8,770	10,861	11,618	11,220	10,863	11,588	11,539
<b>Monroe</b>								
Direct Spending (\$Million)	10.0	10.0	10.0	10.0	10.0	10.4	9.8	9.6
Earnings (\$Million)	2.0	2.0	2.0	2.0	2.0	2.5	2.5	2.6
Employment (jobs)	130	130	170	150	160	170	170	170
Local Govt. Revenue (\$000)	55	82	123	129	104	83	78	73
State Govt. Revenue (\$000)	574	592	597	571	555	553	548	542
<b>Morgan</b>								
Direct Spending (\$Million)	32.0	28.0	30.0	30.0	29.0	29.2	28.0	28.7
Earnings (\$Million)	9.0	8.0	8.0	8.0	8.0	8.6	8.3	9.8
Employment (jobs)	450	440	450	450	470	470	460	520
Local Govt. Revenue (\$000)	186	182	253	274	245	232	244	250
State Govt. Revenue (\$000)	1,976	1,818	1,856	1,793	1,734	1,755	1,771	1,857
<b>Nicholas</b>								
Direct Spending (\$Million)	62.0	61.0	69.0	67.0	63.0	61.9	52.6	49.7
Earnings (\$Million)	9.0	10.0	11.0	11.0	10.0	10.4	10.2	10.2
Employment (jobs)	570	640	650	600	580	590	550	540
Local Govt. Revenue (\$000)	445	529	636	612	543	512	483	444
State Govt. Revenue (\$000)	3,935	4,148	4,319	4,103	3,928	3,937	3,774	3,625
<b>Ohio</b>								
Direct Spending (\$Million)	377.0	363.0	393.0	431.0	385.0	357.4	323.6	287.0
Earnings (\$Million)	70.0	77.0	84.0	93.0	86.0	81.6	75.5	68.7
Employment (jobs)	3,250	3,410	3,570	3,880	3,590	3,350	2,950	2,640
Local Govt. Revenue (\$000)	5,011	4,326	4,096	4,127	4,055	3,934	4,249	3,887
State Govt. Revenue (\$000)	75,162	64,667	56,233	59,357	48,778	48,060	51,224	49,934

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Pendleton</b>								
Direct Spending (\$Million)	9.0	8.0	9.0	9.0	9.0	8.7	7.9	7.7
Earnings (\$Million)	2.0	2.0	2.0	2.0	2.0	2.0	2.1	2.2
Employment (jobs)	130	110	100	110	110	100	120	120
Local Govt. Revenue (\$000)	98	114	149	159	134	116	118	114
State Govt. Revenue (\$000)	553	550	546	543	516	510	514	507
<b>Pleasants</b>								
Direct Spending (\$Million)	7.0	6.0	7.0	7.0	7.0	6.9	5.9	5.6
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Employment (jobs)	60	60	50	50	60	60	50	50
Local Govt. Revenue (\$000)	60	86	128	134	109	88	83	78
State Govt. Revenue (\$000)	437	439	439	432	427	434	423	411
<b>Pocahontas</b>								
Direct Spending (\$Million)	102.0	86.0	77.0	80.0	86.0	88.6	80.2	87.4
Earnings (\$Million)	29.0	25.0	21.0	22.0	24.0	26.0	24.3	25.4
Employment (jobs)	1,350	1,230	1,020	1,060	1,090	1,100	950	1,100
Local Govt. Revenue (\$000)	1,740	1,433	1,279	1,373	1,502	1,569	1,441	1,562
State Govt. Revenue (\$000)	6,511	5,604	4,870	4,929	5,263	5,425	5,005	5,413
<b>Preston</b>								
Direct Spending (\$Million)	33.0	33.0	37.0	37.0	35.0	34.2	29.8	28.2
Earnings (\$Million)	5.0	6.0	7.0	6.0	6.0	6.5	6.8	6.8
Employment (jobs)	320	340	350	350	340	340	340	320
Local Govt. Revenue (\$000)	164	290	408	418	346	297	291	262
State Govt. Revenue (\$000)	2,079	2,203	2,264	2,206	2,113	2,126	2,092	2,007
<b>Putnam</b>								
Direct Spending (\$Million)	74.0	66.0	76.0	75.0	72.0	70.5	57.7	54.8
Earnings (\$Million)	9.0	9.0	9.0	9.0	9.0	9.4	9.5	10.0
Employment (jobs)	450	440	430	420	420	420	420	420
Local Govt. Revenue (\$000)	142	168	236	240	192	159	155	142
State Govt. Revenue (\$000)	4,719	4,687	4,666	4,574	4,498	4,581	4,444	4,307
<b>Raleigh</b>								
Direct Spending (\$Million)	186.0	159.0	180.0	180.0	197.0	171.1	150.9	156.7
Earnings (\$Million)	43.0	39.0	41.0	41.0	49.0	42.1	40.4	43.1
Employment (jobs)	2,180	1,840	1,920	1,850	2,200	1,900	1,740	1,800
Local Govt. Revenue (\$000)	1,792	1,783	2,096	2,154	2,580	2,078	2,152	2,297
State Govt. Revenue (\$000)	11,945	10,756	11,414	11,267	12,430	10,951	10,401	10,782
<b>Randolph</b>								
Direct Spending (\$Million)	45.0	46.0	49.0	48.0	51.0	49.9	46.3	47.1
Earnings (\$Million)	11.0	13.0	13.0	13.0	14.0	14.5	15.0	15.7
Employment (jobs)	620	670	660	650	760	730	740	750
Local Govt. Revenue (\$000)	387	496	578	585	627	581	592	606
State Govt. Revenue (\$000)	2,795	3,034	3,027	2,920	3,125	3,079	3,081	3,138

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Ritchie</b>								
Direct Spending (\$Million)	6.0	6.0	6.0	6.0	6.0	5.9	5.2	6.6
Earnings (\$Million)	1.0	2.0	1.0	1.0	1.0	1.5	1.5	2.4
Employment (jobs)	100	110	80	90	90	80	90	130
Local Govt. Revenue (\$000)	115	172	222	234	193	159	156	185
State Govt. Revenue (\$000)	381	422	360	356	346	348	336	431
<b>Roane</b>								
Direct Spending (\$Million)	14.0	13.0	14.0	14.0	14.0	13.7	11.9	11.4
Earnings (\$Million)	2.0	2.0	2.0	2.0	2.0	2.2	2.2	2.3
Employment (jobs)	130	130	120	120	120	130	120	110
Local Govt. Revenue (\$000)	64	91	132	139	113	93	88	82
State Govt. Revenue (\$000)	853	864	862	843	825	833	813	789
<b>Summers</b>								
Direct Spending (\$Million)	21.0	19.0	21.0	20.0	20.0	18.8	17.0	16.6
Earnings (\$Million)	5.0	5.0	5.0	5.0	5.0	4.4	4.4	4.6
Employment (jobs)	300	310	310	290	270	250	240	250
Local Govt. Revenue (\$000)	251	245	293	284	272	242	238	230
State Govt. Revenue (\$000)	1,307	1,253	1,318	1,228	1,185	1,136	1,111	1,098
<b>Taylor</b>								
Direct Spending (\$Million)	12.0	12.0	13.0	14.0	14.0	12.3	10.4	11.1
Earnings (\$Million)	2.0	3.0	3.0	3.0	3.0	2.8	2.6	3.1
Employment (jobs)	150	150	150	160	160	130	120	130
Local Govt. Revenue (\$000)	83	117	160	171	145	107	109	117
State Govt. Revenue (\$000)	747	813	824	831	821	751	699	754
<b>Tucker</b>								
Direct Spending (\$Million)	43.0	40.0	42.0	41.0	42.0	44.2	44.8	44.7
Earnings (\$Million)	13.0	13.0	13.0	12.0	13.0	14.4	15.4	16.0
Employment (jobs)	710	680	680	650	700	770	770	810
Local Govt. Revenue (\$000)	687	690	768	763	773	796	861	838
State Govt. Revenue (\$000)	2,729	2,624	2,669	2,525	2,607	2,722	2,850	2,862
<b>Tyler</b>								
Direct Spending (\$Million)	6.0	6.0	6.0	6.0	6.0	6.2	5.5	5.2
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.4	1.4	1.5
Employment (jobs)	80	70	70	80	80	80	80	70
Local Govt. Revenue (\$000)	81	112	160	168	139	116	115	107
State Govt. Revenue (\$000)	393	393	390	387	381	388	382	369
<b>Upshur</b>								
Direct Spending (\$Million)	30.0	27.0	33.0	34.0	34.0	33.5	30.6	29.3
Earnings (\$Million)	7.0	7.0	8.0	9.0	9.0	9.5	9.8	9.8
Employment (jobs)	370	320	390	410	430	430	450	430
Local Govt. Revenue (\$000)	176	187	295	319	305	297	305	282
State Govt. Revenue (\$000)	1,893	1,824	2,047	2,054	2,033	2,063	2,055	1,989

## West Virginia County Travel Impacts, 2008-2016p

	2008	2010	2011	2012	2013	2014	2015	2016p
<b>Wayne</b>								
Direct Spending (\$Million)	50.0	50.0	55.0	55.0	51.0	50.9	45.6	42.4
Earnings (\$Million)	7.0	7.0	7.0	7.0	7.0	7.6	9.6	9.7
Employment (jobs)	370	360	360	350	340	360	360	360
Local Govt. Revenue (\$000)	150	207	257	292	301	272	266	264
State Govt. Revenue (\$000)	2,190	2,225	2,229	2,178	2,117	2,132	2,078	2,022
<b>Webster</b>								
Direct Spending (\$Million)	10.0	9.0	10.0	10.0	10.0	9.7	8.1	7.6
Earnings (\$Million)	1.0	1.0	1.0	1.0	1.0	1.1	1.1	1.2
Employment (jobs)	70	80	70	70	70	70	70	70
Local Govt. Revenue (\$000)	74	106	154	161	132	108	103	96
State Govt. Revenue (\$000)	623	628	624	610	597	605	586	563
<b>Wetzel</b>								
Direct Spending (\$Million)	22.0	24.0	27.0	27.0	27.0	26.0	26.5	28.4
Earnings (\$Million)	3.0	5.0	5.0	5.0	5.0	5.0	6.1	7.1
Employment (jobs)	220	280	260	270	270	270	310	360
Local Govt. Revenue (\$000)	141	292	358	387	353	321	391	430
State Govt. Revenue (\$000)	1,400	1,658	1,654	1,675	1,647	1,641	1,828	1,960
<b>Wirt</b>								
Direct Spending (\$Million)	1.0	1.0	1.0	1.0	1.0	1.4	1.4	1.4
Earnings (\$Million)	0.0	0.0	0.0	0.0	0.0	0.4	0.5	0.5
Employment (jobs)	20	20	20	20	20	20	20	20
Local Govt. Revenue (\$000)	46	68	102	107	86	68	64	60
State Govt. Revenue (\$000)	70	73	74	70	67	65	66	66
<b>Wood</b>								
Direct Spending (\$Million)	119.0	108.0	116.0	124.0	123.0	128.9	111.7	104.7
Earnings (\$Million)	23.0	23.0	21.0	24.0	26.0	29.3	28.2	27.7
Employment (jobs)	1,150	1,090	1,020	1,120	1,150	1,250	1,160	1,100
Local Govt. Revenue (\$000)	731	715	806	957	971	1,141	1,335	1,196
State Govt. Revenue (\$000)	7,553	7,390	7,233	7,643	7,664	8,247	7,864	7,476
<b>Wyoming</b>								
Direct Spending (\$Million)	36.0	33.0	36.0	36.0	35.0	33.7	27.4	25.7
Earnings (\$Million)	4.0	5.0	4.0	4.0	4.0	4.4	4.3	4.5
Employment (jobs)	220	210	180	190	190	190	170	170
Local Govt. Revenue (\$000)	100	129	188	209	174	146	143	133
State Govt. Revenue (\$000)	2,313	2,316	2,233	2,234	2,177	2,194	2,117	2,034

**Total Employment and Earnings Compared to  
Direct Travel-Generated Employment and Earnings by County, 2016p**

County	Employment			Earnings (\$Millions)		
	Total	Travel	Percent	Total	Travel	Percent
Barbour	5,760	157	2.7%	201.7	2.6	1.3%
Berkeley	45,290	1,207	2.7%	1,999.2	25.8	1.3%
Boone	8,430	163	1.9%	478.9	3.1	0.7%
Braxton	5,440	328	6.0%	197.8	8.0	4.0%
Brooke	11,710	189	1.6%	505.4	4.9	1.0%
Cabell	65,280	1,498	2.3%	3,109.5	33.6	1.1%
Calhoun	3,760	80	2.1%	110.9	1.2	1.1%
Clay	2,330	40	1.7%	74.0	0.8	1.0%
Doddridge	3,330	52	1.6%	104.9	1.3	1.3%
Fayette	15,050	785	5.2%	633.4	16.1	2.5%
Gilmer	3,810	81	2.1%	141.9	1.4	1.0%
Grant	5,690	149	2.6%	252.5	2.4	0.9%
Greenbrier	18,510	2,321	12.5%	776.9	98.0	12.6%
Hampshire	7,610	380	5.0%	226.2	6.6	2.9%
Hancock	11,970	4,332	36.2%	536.0	77.5	14.5%
Hardy	7,720	308	4.0%	272.9	4.7	1.7%
Harrison	46,330	1,729	3.7%	2,622.7	43.1	1.6%
Jackson	11,780	450	3.8%	465.8	7.6	1.6%
Jefferson	22,060	7,439	33.7%	907.9	181.0	19.9%
Kanawha	130,500	4,447	3.4%	7,399.8	113.1	1.5%
Lewis	9,250	612	6.6%	507.6	14.3	2.8%
Lincoln	4,300	143	3.3%	173.7	2.5	1.4%
Logan	12,750	327	2.6%	632.1	7.5	1.2%
McDowell	6,420	170	2.6%	327.5	3.1	0.9%
Marion	27,160	1,012	3.7%	1,302.1	20.8	1.6%
Marshall	18,020	439	2.4%	1,054.3	11.0	1.0%
Mason	8,390	250	3.0%	359.8	4.0	1.1%
Mercer	26,910	1,113	4.1%	1,144.4	23.9	2.1%
Mineral	10,660	263	2.5%	461.0	4.4	1.0%



**Total Employment and Earnings Compared to  
Direct Travel-Generated Employment and Earnings by County, 2016p**

County	Employment			Earnings (\$Millions)		
	Total	Travel	Percent	Total	Travel	Percent
Mingo	7,860	252	3.2%	437.2	4.7	1.1%
Monongalia	69,950	2,027	2.9%	3,846.3	51.0	1.3%
Monroe	4,020	175	4.3%	126.0	2.5	2.0%
Morgan	4,810	477	9.9%	159.1	8.6	5.4%
Nicholas	10,350	597	5.8%	456.1	10.4	2.3%
Ohio	32,460	3,358	10.3%	1,563.4	81.6	5.2%
Pendleton	3,110	110	3.5%	104.7	2.0	1.9%
Pleasants	4,160	62	1.5%	227.0	1.0	0.4%
Pocahontas	4,760	1,105	23.2%	156.6	26.0	16.6%
Preston	11,830	349	3.0%	493.8	6.5	1.3%
Putnam	26,790	428	1.6%	1,466.3	9.4	0.6%
Raleigh	40,750	1,904	4.7%	2,059.1	42.1	2.0%
Randolph	15,110	732	4.8%	592.4	14.5	2.4%
Ritchie	5,580	87	1.6%	220.2	1.5	0.7%
Roane	6,630	133	2.0%	174.8	2.2	1.3%
Summers	3,680	259	7.0%	118.9	4.4	3.7%
Taylor	5,160	139	2.7%	206.2	2.8	1.3%
Tucker	3,980	771	19.4%	142.5	14.4	10.1%
Tyler	3,480	82	2.3%	152.1	1.4	0.9%
Upshur	11,190	439	3.9%	466.9	9.5	2.0%
Wayne	11,350	370	3.3%	604.0	7.6	1.3%
Webster	3,050	76	2.5%	115.0	1.1	1.0%
Wetzel	6,170	280	4.5%	221.0	5.0	2.2%
Wirt	1,390	27	2.0%	31.6	0.4	1.4%
Wood	48,790	1,259	2.6%	2,194.3	29.3	1.3%
Wyoming	6,370	194	3.1%	309.8	4.4	1.4%

# 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.

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>.