



A Canadian couple stopped at the Midland Trail Travel Information Center at Malden, located four miles above the Capitol at Cabin Creek Quilts. They said they had been on four-lane highways for too long and were looking to begin their vacation as soon as possible. They relaxed and looked a bit at the quilt display until the wife declared that she had found a perfect gift for their daughter, who would be married next spring. Twelve hundred dollars later, the couple was thrilled to have found a high-quality handmade American quilt. A few phone calls and they were booked into one of the two riverside suites at the Glen Ferris Inn, with whitewater rafting planned for the next morning. When they saw pictures of Lewisburg and its antique shops and galleries, they booked two nights at the Greenbrier Hotel.

The couple had spent nearly \$3500 in West Virginia within one hour.

Without Travel Information, a \$3.75 Turnpike Toll, gasoline and a lunch would have been the net tourism profit before

these Canadians were out of West Virginia. The potential impact of tourism is tremendous and its benefits are obvious daily to front-line travel information staff.

This story illustrates possibilities; what happened for this couple can happen for thousands of others. The Midland Trail's potential to create sustainable economies where none had previously existed is excellent. The benefits of the Midland Trail's marketing efforts are known throughout the region. Lewisburg, White Sulphur Springs, Fayetteville, Ansted, Gauley Bridge, Montgomery, Malden and Charleston all have indicated good results from the first Destination Guide and the "We Have It All" campaign. The second Guide is presently in the works, and will integrate Gateway additions throughout the State into its design.

Economic Impact

THE BOTTOM LINE

ECONOMIC IMPACT OF A DAY ON THE TRAIL

The Charleston Area Visitor Bureau estimates that the average daily expenditure of a visitor to the city is \$98.00. Since visitors to the Midland Trail may add one more day to their stay to take in attractions along the eastern end, these figures will be useful. The Fayette County Visitors Bureau estimates the average daily expenditure to be \$93.00. In Greenbrier County, the estimate runs at \$89.00.

This daily allowance is divided between lodging (\$40.00), food (\$25.00), gasoline (\$8.00), and the balance between admissions to events, gifts, and miscellaneous expenses (\$20.00). These estimates correspond closely between each of the three counties in the Midland Trail region.

Multipliers used by economists provide us with the estimates for employment in a region. The total employment along the Midland Trail is both a result of direct as well as indirect influences of tourism upon local and regional economies.

HOTELS AND RESTAURANTS

At the present time, the Trail is tremendously underserved in terms of motel, hotel and bed-and-breakfast accommodations. A number of motel and hotel development projects have been suggested; however, developers have been reluctant to move forward, preferring to take a "wait and see" approach to tourism developments along The Trail. Our indicators would support development proposal for 100 plus additional rooms along with expanding meeting facilities at Hawk's Nest State Park.

HOTELS, MOTELS, AND BED-AND-BREAKFAST ROOM COUNTS:

Eastern Kanawha	68
Fayette	96
Greenbrier	835
(includes 745 at Greenbrier Resort)	

RESTAURANTS AND GIFT SHOPS

Greenbrier County has the best selection of restaurants along the Trail. Lewisburg is renowned for its range of restaurants, gift stores, antique shops and galleries. White Sulphur Springs has several restaurant choices and is developing its main street selection of gift shops. Operating inside the Greenbrier are a variety of shops for the discriminating guest.

Fayette County has several restaurants. Hawks Nest Lodge and Glen Ferris Inn, along with a small assortment of fast-food restaurants, make up the selection in Fayette County. Gauley Bridge Crafts and Visitor Center, Hawks Nest Lodge Visitor Center and Crafts Shop and Restaurant, and the Midland Trail Gallery are the main shopping and eating opportunities. North American River Runners offers food and whitewater-related gifts at Hico. Just off the Trail, several other whitewater companies offer food and sport-related gifts.

Kanawha County, outside the city limits of Charleston, has a limited number of restaurants and gift shops. Cabin Creek Quilts Cooperative is an internationally-known producer of handmade quilts located in the Malden Historic District. Shoney's and a fast food restaurant are being developed. Local regional restaurants rather than chain type will add to the character of the Trail.

ECONOMIC IMPACT

YEAR	2000	2001	2002	2003	2004
VISITOR DAYS	20,000	30,000	40,000	50,000	60,000
VISITOR SPENDING PER DAY	\$ 90.00	\$ 90.00	\$ 90.00	\$ 90.00	\$ 90.00
IMPACT	\$1,800,000	\$2,700,000	\$3,600,000	\$4,500,000	\$5,400,000

Total annual accumulation based on average two day stay.
\$90 includes accommodation, food, gas, and gift/souvenir purchases.

METHODOLOGY

In making estimates of economic impact, the MTSHA has chosen ambitious figures; yet, we believe these numbers to reflect a realistic assumption of increase in the tourism market. We are planning on an additional 10,000 visitors each year over the next five years. Thus, if we receive 20,000 visitors in 2000, then by 2004 we expect an additional 60,000 visitors. These numbers are based upon information received from other scenic byways.

Determination of our estimates of impacts on the Midland Trail Scenic Highway Region resulted from use of economic base theory and standard tourism economic assumptions. This theory is accepted as one of the most practical means of establishing the direct and indirect impacts of the tourism industry upon the region.

Travel Market

Analysis

Study according to National Travel Monitor conducted by the firm of Yesawich, Perrdine, & Brown and the Yankleovich Partners.

INTERNATIONAL ECONOMIC IMPACT

According to the U.S. Department of Commerce, nearly 48 million international visitors to the United States spent more than \$73 billion in 1997, excluding air fare.

*The average overseas visitor spent \$101 per person per day (excluding air fare); Brazilians were the big spenders at \$172 per day. Asian spending has dropped 10% as a result of the economic problems in the Far East. Japan tops the list in overall spending in the US. Japan's Toyota Plant and other West Virginia interests provide an important link with that market.

*Canadian arrivals to the United States are expected to drop slightly by 2001. However, Canada is still an important market for the Trail.

GETAWAYS

The number of weekend getaways which Americans took increased a huge 70% between 1986 and 1996. The Midland trail is PERFECTLY positioned to take a portion of this market. A survey conducted by Wiese Research for Embassy Suites determined that 86% of adults took a weekend getaway trip in 1996.

Recent studies indicate that even those who make one-day or one-evening trips on highways or secondary roads spend \$2 on gas, food,

lodging, and sundries for every \$1 they expend for attending or visiting an attraction. These results spell out one inescapable conclusion: creating new attractions and preserving and enhancing existing ones on Route 60 will result in economic benefits for Trail merchants.

HISTORIC AND CULTURAL TOURISM

In 1997, a TIA TravelScope Survey showed that 65.9 million, or 25% of U.S. adults, took a trip which involved an historic place, museum, cultural event or festival. These travelers spent an average of \$15 on their trips compared with \$425 for other travelers. The historic and cultural traveler stayed an average 4.7 nights in hotels and B&B's and a whopping 47% say they "love to shop".

Out of nearly 200 million people traveling 50 miles or more, 92.4 million included cultural activity in their itineraries. Of that number, 61% added a half-day to their trip to enjoy this activity.

GAMING

Like it or not--believe it or not--90% of U.S. adults support casino gambling as an entertainment activity. Within this category, for West Virginia, could fall bingo; this activity has seen tremendous growth at one location along the Midland Trail.

SPORTS EVENTS

Two-fifths of American adults are sports events travelers. The Midland Trail needs to keep this fact in mind.

RV TRAVEL

The Recreational Vehicle Industry Association reports a 20-year high in RV

shipments, which increased 14% in 1998 and are expected to increase another 3% in 1999. Since most of West Virginia's travelers still arrive by automobile, this trend has significant impact on the Midland Trail's economy and number of guests.

WEST VIRGINIA OVERNIGHT LEISURE TRAVEL

The total number of overnight leisure travelers who visited West Virginia fell 3% from 1997 to 1998. The total volume of overnight leisure person-days increased a noteworthy 10%, growing from 22.9 million person-days in 1997 to 25.2 million person-days in 1998. When we measure these person-days in actual time spent, the length of stays for visitors has increased from 3.4 to 3.6 days in the period 1997-1998, even though the number of people is down.

TOP ORIGIN MARKETS FOR WEST VIRGINIA

The majority of West Virginia's market was regional for overnight stays. These visitors (74%) came from the surrounding states of Ohio, Virginia, Maryland, North Carolina, Pennsylvania and South Carolina. Many of these visitors (47%) indicated that they were traveling to visit family or friends. North Carolinians travel to West Virginia just to enjoy skiing at such resorts as Winterplace.

From 1997 to 1998, there were several noteworthy shifts in travel from some of West Virginia's top origin markets. The most noted increase was from Ohio (up from 14% to 18%). North Carolina was up from 14% to 18%; South Carolina's contribution was up 9% from 6%. Kentucky, Michigan, and Tennessee each dropped approximately 1% for a total market share of approximately 12%.

