

Tourism and the West Virginia Economy

By

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And

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Overview

Travel and tourism continues to make an important contribution to the development of the West Virginia economy. In 2005 the first report on the comparative performance of tourism and other industries in West Virginia was released by the West Virginia University Bureau of Business and Economic Research (BBER).² This report clearly demonstrated the growth of the tourism sector as measured by gross domestic product and employment relative to other traditional sectors such as manufacturing and mining.

The West Virginia Division of Tourism has commissioned the BBER to update the 2005 report with a focus on the comparative analysis of various segments of the travel and tourism industry related to other sectors. In addition, this updated report includes economic forecasts of travel and tourism sectors compared to total employment. As in the 2005 report, this study uses definitions of travel and tourism sectors that differ from the usual definitions used by the travel and tourism industry.

Travel and tourism as defined by the industry:

Travel and tourism expenditures are defined as travel for business or pleasure, which takes place 50 miles or more away from home or outside an individual's usual environment. As a result, tourism is defined on the basis of the characteristics of the ultimate consumer.

This industry view of itself is a very useful one since it focuses on the consumer of the goods and services provided by the industry. As such it provides insights into the validity and returns of marketing programs as well as permitting those within the industry to develop new products and services.

Unfortunately, this view of the industry is incompatible with the definitions and measurements of other industry sectors, particularly by governmental statistical agencies.

² Tom S. Witt and Mark Fletcher, *Tourism and the West Virginia Economy*, Bureau of Business and Economic Research, West Virginia University, March 2005, available at www.bber.wvu.edu.

Travel and tourism as defined by governmental statistical agencies:

The basis for all industry definitions exists in definitive industry classification systems promulgated by the Bureau of Economic Analysis (BEA), U.S. Department of Commerce. Prior to 1998 the standard was contained in the Standard Industry Classification System (SIC). Since 1998 the standard is the North American Classification System (NAICS). Using these standard industry classifications, statistical information on gross domestic product, employment, and other economic measurements are released by the BEA, Bureau of Labor Statistics (BLS) and Census Bureau. Unfortunately, without additional information on the allocation of the industry measurements between visitor and non-visitor consumption, no definitive estimate of travel and tourism can be made at the state level.

Does this mean that a valid comparison of travel and tourism industries with other industries can't be made? This is the basic question addressed in both the 2005 study and this report. The research report documents the economic contribution of industries containing different components of the travel and tourism industry with other major industry segments within West Virginia. While not definitive, the comparison allows policy makers to see the relative economic importance of various sectors of the West Virginia economy, including major components of the travel and tourism industry.

This study uses federal, domestic and private statistical data series over the period 1990-2005. The comparisons will utilize the North American Industrial Classification System (NAICS) methods of classifying industry sectors. An analysis of data from 1980-2000 using the Standard Industrial Classification System (SIC) is found in the 2005 report.

The result is statistical tables, charts, and analysis documenting the changes in various components of industries encompassing travel and tourism with other major industries in West Virginia. This report also presents employment and gross domestic product forecasts of these sectors. In addition, the report summarizes some major investments in the travel and tourism industry in the last several years and highlights the emerging importance of second home communities in attracting visitors to the state. By presenting a multi-dimensional statistical profile of all industries, policy makers will better understand the growing importance of the travel and tourism industry to the state's economic future.

Travel and Tourism Growth as Measured by Gross Domestic Product

Economists, with the assistance of government statisticians, have several ways of measuring the economic contribution of different industries. The primary measure examined at the national level is Gross Domestic Product (GDP). Every quarter financial markets await the release of the preliminary GDP number for the previous quarter.

Gross Domestic Product (GDP) is the market value of goods and services produced by labor and property in the United States, regardless of nationality; GDP replaced Gross National Product as the primary measure of U.S. production in 1991. GDP is one part of the national income and product account, the major accounting system for economic activity in the United States. GDP is also the value added in production by the labor and capital. Prior to 2006, GDP at the state level was termed gross state product; however, now the term GDP is used at both the U.S. and state level.

Depending on the increase or decrease in GDP, one can determine whether or not the entire economy is growing, or not. Further refinements are made in the preliminary GDP estimates in subsequent months as additional information arrives at BEA from other statistical agencies and reporters. BEA also releases information on the gross output by industry.

Within the United States, the Bureau of Economic Analysis (BEA), Department of Commerce, has developed a set of travel and tourism satellite accounts to augment the national income and product accounts. BEA's estimates of U.S. tourism industry sales include figures for both direct and indirect sales. Direct tourism sales are sales by tourism industries to out-of-town visitors. Indirect tourism sales are sales to tourism industries by the chain of industries that supply them. Indirect sales were estimated by BEA using industry-by-industry total requirements coefficients from BEA's input-output accounts.

Specific definitions, frameworks, and estimation methods used by BEA in estimating the economic contributions of the travel and tourism industry follow guidelines developed by the World Tourism Organization (WTO) and the Organization for Economic Co-Operation and Development (OECD). Through the publication of quarterly estimates of

travel and tourism, BEA documents the economic contributions of the industry and permits valid comparisons with other industries.³ As a result of BEA's statistical program, estimates of travel and tourism gross output at the national level can be compared with the gross output of other industries such as manufacturing, agriculture, mining and services.

Unfortunately, BEA has not implemented a satellite travel and tourism account methodology at the individual state level, which would permit comparisons of GDP associated with travel and tourism with other industries. Consequently, there are no definitive federal statistical series related specifically to travel and tourism GDP at the state level.⁴ On the other hand, there are specific industry sections within the overall GDP series that include a significant portion of the industry.

Table 1 lists the detailed industry data from GDP which is available for West Virginia based upon the NAICS classification system.⁵ When one examines the industries in Table 1, one does not see an explicit travel and tourism industry. Instead, specific industries such as portions of transportation along with arts, entertainment, and recreation as well as accommodations and food services are highlighted as being primarily associated with travel and tourism. Based on work undertaken by BEA, other major industries such as wholesale trade, gasoline service stations, other retail, air transportation and transit and ground passenger transportation have major portions of their economic activity associated with travel and tourism.

Using the NAICS data on West Virginia GDP, a series of charts and tables were constructed allowing for a comparison of various dimension of the travel and tourism industry with other industry sectors. This data consists of both historic data as well as

³ See BEA's website for further information on the travel and tourism satellite accounts <http://www.bea.gov/beatn2/home/tourism.htm>.

⁴ A number of states have implemented their own travel and tourism satellite accounts including Louisiana, Alaska, Delaware, Virginia, New Jersey, Rhode Island, North Carolina, and South Carolina.

⁵ This report presents industry data based on the NAICS classification. On the other hand, the 2005 report presented data based upon both SIC and NAICS definitions since the federal statistical system was transitioning to NAICS. Data from 1990 to 2005 is available from Global Insight. The Bureau of Economic Analysis, U.S. Department of Commerce, only provides gross domestic product by industry detail from 1997.

economic forecasts. In Fall 2006 Global Insight and the WVU Bureau of Business and Economic Research released economic forecasts of the West Virginia economy, including some of the sectors comprising the travel and tourism industry.⁶ These forecasts are referenced in the following graphs and tables, as well as the analysis and forecasts of the travel and tourism industry. The following constitute some summary conclusions from each of the GDP charts and tables.

Chart 1 Growth in West Virginia Real GDP by Selected Industry (1990-2005)

This chart highlights the growth in real GDP (adjusted for inflation) over the period 1990-2005 available from Tables 4 and 5. The data on the nominal GDP by industry is available in Tables 2 and 3. The leisure and hospitality industry (composed of arts, entertainment, and recreation along with accommodations and food services) annual growth rate exceeded that of mining, durable manufacturing, construction, finance and insurance, educational services, and government. In particular, the arts, entertainment, and recreation growth rates were over six percent annually, a very high rate of growth.

Chart 2 Forecast Growth in West Virginia Real Gross Domestic Product by Selected Industries (2006-2036)

This chart highlights the Global Insight long-term forecasts of real GDP over the period 2006-2036. The leisure and hospitality industry growth rate is approximately the same as found in the financial activities industry and is below that forecast for both educational services and government. On the other hand, the long term forecasts of the leisure and hospitality industry greatly exceed those of mining and durable manufacturing, both of which are forecast to decline, as well as construction.

Table 2 West Virginia Gross Domestic Product 1990-2005 (millions of current dollars)

The table lists GDP by industry data for selected years that is available from Global Insight. Those industries in italics and bold represent 'pure' examples of industries associated with travel and tourism. As noted earlier, however, there are large segments of

⁶ Global Insight, Long-term Outlook for West Virginia, 2006-2036, Fall 2006, and George W. Hammond, *West Virginia Economic Outlook 2007*, Bureau of Business and Economic Research, West Virginia University, November 2006.

the economy either directly or indirectly associated with travel and tourism; examples include both wholesale and retail trade. Of particular note is the 10.1 percent average annual growth rate in the arts, entertainment, and recreation industry over the period compared to a growth rate of 4.2 percent in overall GDP in West Virginia. Other tourism related sectors also exhibited growth rates above the overall GDP growth rate.

Table 3 West Virginia Tourism Related Industries Gross Domestic Product 1998-2005 (millions of current dollars)

Since 1998 BEA has provided more detail on GDP by industry. Table 3 provides this detail for the leisure and hospitality sectors during the period 1998-2005.

Table 4 West Virginia Real Gross Domestic Product 1990-2005 (millions of 2000 dollars)

Global Insight also provides estimates of real GDP (adjusted for inflation). Table 4 presents these estimates for selected years from 1990 through 2005 as well as the average annual growth rate over the same period. As in the earlier tables, leisure and hospitality growth rates greatly exceed many other sectors as well as the overall GDP growth rate.

Table 5 West Virginia Tourism Related Industries Real Gross Domestic Product 1998-2005 (millions of real dollars)

As in the case of Table 3, Table 5 provides greater detail on growth in real GDP in the leisure and hospitality sectors during the period 1998-2005.

Table 6 West Virginia Real Gross Domestic Product Index 1990-2005 (Year 2000=100)

This table documents the comparative growth in real GDP by industry sectors from 1990 through 2005. Overall the leisure and hospitality industry started from a comparative lower base in 1990 than many other sectors and has outpaced the growth of many sectors as well as overall GDP over the 15 year period.

Table 7 West Virginia Tourism Related Industries Real Gross Domestic Product Index 1998-2005 (Year 2000=100)

As in the case of Tables 3 and 5, Table 7 provides greater detail on growth in real GDP in the leisure and hospitality industry from 1998 through 2005. As was found in the earlier tables, the real growth in this industry and some key sectors has been from a lower base in 1998 than overall real GDP and has grown relative to overall real GDP.

Table 8 West Virginia Real Gross Domestic Product 1990-2005 (percent by sector)

Finally, this table documents the comparative growth or decline of various industry sectors as measured by the percent of total real gross domestic product for selected years 1990, 1995, 2000 and 2005. All of the leisure and hospitality sectors have become an increasing share of real gross domestic product over this period.

Travel and Tourism Growth as Measured by Employment

Besides GDP, another important economic contribution evolves around the employment opportunities created by major industries. In this study we examine two major definitions of employment. The Bureau of Labor Statistics (BLS), U.S. Department of Commerce, is the agency charged with estimating employment on a monthly basis. BLS uses the Current Population Survey of households to estimate employment by place of residence. BLS defines employed persons as:

Persons 16 years and over in the civilian noninstitutional population who, during the reference week, (a) did any work at all (at least 1 hour) as paid employees; worked in their own business, profession, or on their own farm, or worked 15 hours or more as unpaid workers in an enterprise operated by a member of the family; and (b) all those who were not working but who had jobs or businesses from which they were temporarily absent because of vacation, illness, bad weather, childcare problems, maternity or paternity leave, labor-management dispute, job training, or other family or personal reasons, whether or not they were paid for the time off or were seeking other jobs. Each employed person is counted only once, even if he or she holds more than one job. Excluded are persons whose only activity consisted of work around their own house (painting, repairing, or own home housework) or volunteer work for religious, charitable, and other organizations.⁷

Another comparison can be made through the use of employment data provided by BEA as part of its Regional Economic Information System.⁸ BEA's employment estimates are inclusive of the West Virginia Bureau of Employment Programs' estimates of payroll employment as well as employment associated with sole proprietors and partnerships. As in the case of GDP, these employment data are for comparable NAICS industry classifications. In the remaining portion of this section, charts and tables are reviewed using employment data from both BLS and BEA.

⁷ Bureau of Labor Statistics, Glossary, available from www.bls.gov.

⁸ See BEA's website for further information on the Regional Economic Information System <http://www.bea.gov/bea/regional/data.htm>.

How is Employment Measured?

Employment is defined in a variety of ways. Three widely used measures of annual county employment and wages by place of work are the Census Bureau's employment and payroll data in the County Business Patterns (CBP) series, the Bureau of Labor Statistics' (BLS) employment and wage tabulations from the unemployment insurance (UI) program, and BEA's estimates of total wage and salary disbursements and employment. The BEA estimates of employment and wages differ from the BLS data because BEA makes adjustments to account for employment and wages not covered, or not fully covered, by the state UI and the UCFE programs. First, BEA adds estimates of employment and wages to the BLS data to bridge small gaps in UI coverage: For nonprofit organizations not participating in the UI program (several industries), for students and their spouses employed by public colleges or universities, for elected officials and members of the judiciary (state and local government), for interns employed by hospitals and by social service agencies, and for insurance agents classified as statutory employees (insurance agencies). Second, BEA uses additional source data to estimate most or all of the employment and wages for the following: Farms, farm labor contractors, private households, private elementary and secondary schools, religious membership organizations, railroads, military, and U.S. residents who are employed by international organizations and by foreign embassies and consulates in the United States. Third, BEA adjusts employment and wages for misreporting under the UI programs. (Source: www.bea.gov)

Chart 3 Forecast Growth in West Virginia Employment By Selected Industry (2006-2010)

This chart highlights the Global Insight forecast of the BLS employment growth rates over the period 2006-2010. While employment in the leisure and hospitality industry grows at a rate of one or more percent a year, other sectors such as mining and educational services also have projected growth rates of over one percent a year. In contrast, durable manufacturing is forecasted to continue declining which construction, financial services and government employment growth lags behind leisure and hospitality.

Chart 4 West Virginia Leisure and Hospitality Employment Index (1990-2010)

The chart shows the actual and Global Insight forecast of leisure and hospitality employment (BLS definition) in West Virginia from 1990-2010. The leisure and hospitality sector is compared to total non-farm employment on an index number basis

with 1990 equal to 100. The chart clearly documents the substantial growth of this sector compared to the non-farm sector of the West Virginia economy.

Chart 5 West Virginia Transportation, Trade and Utilities Employment Index (1990-2010)

The chart shows the actual and Global Insight forecast of transportation, trade and utilities employment (BLS definition) in West Virginia from 1990-2010. The transportation, trade and utilities sector is compared to total non-farm employment on an index number basis with 1990 equal to 100. The chart clearly documents the substantial growth of this sector compared to the non-farm sector of the West Virginia economy; however, it should be note that only a portion of this growth can be attributable to growth in overall travel and tourism.

Chart 6 West Virginia Retail Trade and Financial Activities Employment Index (1990-2010)

The chart shows the actual and Global Insight forecast of two sectors (retail trade and financial activities) employment (BLS definition) in West Virginia from 1990-2010. Both sectors are compared to total non-farm employment on an index number basis with 1990 equal to 100. The chart clearly documents the relative stagnation of these sectors since 2000 compared to the non-farm sector of the West Virginia economy; however, it should be note that only a portion of the employment in retail trade is associated with growth in overall travel and tourism.

Chart 7 West Virginia Accommodation and Entertainment Employment Index (1990-2010)

The chart shows the actual and Global Insight forecast of two sectors (arts, entertainment, recreation and accommodation/food services) employment (BLS definition) in West Virginia from 1990-2010. Both sectors are compared to total non-farm employment on an index number basis with 1990 equal to 100. The chart clearly documents the relative growth of these sectors compared to total non-farm employment both historically and during the forecast period.

Chart 8 West Virginia Leisure and Hospitality Employment: BEA and Global Insight (2001-2005)

This chart shows the comparative growth of the BEA and BLS (Global Insight provided) leisure and hospitality employment from 2001-2005. Throughout the entire period both

employment measures increased on a steady basis with about 9,000 jobs difference between the two measures.

Table 9 West Virginia Employment by Industry 2001-2005 (BEA Definition)

This table presents employment in West Virginia as measured by BEA. The sectors making up leisure and hospitality grew at an annual rate of 2.6 percent compared to total employment growth of only 0.8 percent per year. During this period many key sectors such as forestry, utilities, manufacturing, information, finance and insurance showed declines in employment. The total employment in leisure and hospitality rose from 71,850 in 2001 to 79,571 by 2005, evidence of continued growth in this important segment of the travel and tourism industry.

The table also compares the West Virginia and U.S. average annual growth rates in employment by industry over the period 2001-2005. West Virginia's growth rate of 2.6 percent for the leisure and hospitality industry employment far exceeded the U.S. growth rate of 1.7 percent. This was largely the result of robust growth in arts, entertainment, and recreation, which grew at an average of 6.4 percent in West Virginia, compared to 1.2 percent nationally.

Table 11 West Virginia Employment by Industry Forecast 2006-2011 (Global Insight)

This table presents Global Insight forecasts of employment by industry from 2006 through 2011.

Table 12 West Virginia Employment Forecasts by WVU BBER (2006-2011)

This table provides the latest WVU Bureau of Business and Economic Research forecasts of employment by major industry.⁹ Over the period 2006-2011, the forecast calls for an average of 1,100 jobs added annually in the leisure and hospitality industry, compared with an average total job growth of 6,600 within the state. Leisure and hospitality employment growth will be at an average annual rate of 1.5 percent, compared to total job growth of 0.9 percent annually during the forecast period. Goods producing sectors

⁹ George W. Hammond, *West Virginia Economic Outlook 2007*, Bureau of business and Economic Research, West Virginia University, November 2006.

will only average 400 jobs annually, a growth rate of 0.3 percent annually during the period. Some industry sectors are projected to have declining employment including coal mining, manufacturing, and manufacturing.

Travel and Tourism Growth by Other Indicators

While this report's focus has been on travel and tourism's growth as measured by gross domestic product and employment, there are other manifestations of the economic contributions of the industry over the past 25 years. Unfortunately, comparable statistics have not been readily available to document the myriad dimensions of this growth on a consistent fashion. Based upon various documents and interviews, however, the following are some observations on recent developments and announced investment in the industry.

In the 2005 study mention was made of the significant investments made at Oglebay Resort in Wheeling. This facility has evolved into a 1,650 acre destination with lodging, dining, conference, recreational facilities, two championship golf courses, zoo, planetarium, skiing, and seasonal events. A new 53 room addition to the lodge was opened in 2006. An additional phase 2 of this \$15 million project entailed a complete redesign of existing rooms. The continued growth of the Oglebay's National Training Center, in collaboration with national organizations, brings individuals to Wheeling for professional staff and management training.

In addition, the 2005 study mentioned the extensive network of parks within the West Virginia State Park System as well as other lodging facilities and campsites managed by the Division of Forestry and other state agencies. One measure of the growth of tourism is the number of cabins occupied in the state parks and forests. During fiscal year 1983 (July 1, 1982-June 30, 1983) the number of cabins sold was 45,612 for an occupancy rate of 44.3 percent. By fiscal year 2006 this number had increased to 56,554 with an occupancy rate of 56.6 percent. The number of rooms sold in the state park lodges has grown from 108,974 in fiscal year 1983 to 143,254 in fiscal year 2006. Estimated attendance at all state parks totaled 6,283,868 persons during fiscal 2006; however, this was a decline from the peak attendance of 8,063,993 in fiscal year 1996.¹⁰

¹⁰ Information provided by the West Virginia State Parks, Division of Natural Resources.

West Virginia's ski industry has grown dramatically over time. The West Virginia Ski Areas Association (Snowshoe, Timberline, Winterplace, Canaan Valley, White Grass, Elk River and Blackwater Falls) reports that the number of skier visitors was 602,000 during the winter 1995-96. By the winter 2002-2003 it had grown to 857,000 before dropping to 812,000 skier visitors during the winter 2003-2004. Nationally, the industry grew between 3-4 percent annually until recently when attendance nationally has flattened out.

Comparative data on the total ski-days percent change over the last four seasons for the Southeast Ski region and Snowshoe Resort is provided in Chart 9. In the past four years there have been considerable swings in the number of ski-days from one season to another, largely the result of weather conditions. Snowshoe has continued to evolve to a four seasons resort with numerous other activities outside of the ski-season. The result is over 750,000 visitors annually to Snowshoe generating considerable economic impacts. One measure of this growth is the growth in the Pocahontas County Hotel/Motel Tax paid by Snowshoe, which has grown from \$544,544 in FY 1999-2000 to \$794,603 in FY 2005-2006.¹¹ At the present time more than 600 individuals are employed year-round with upwards of 1,650 during the peak winter season.

Tamarack has also contributed to the growth of travel and tourism in West Virginia. As indicated in Chart 10, the number of visitors to Tamarack has increased dramatically since 1996. During 2005 there were around 400 bus tours and over 450,000 visitors annually to the facility. Recent expansions at Tamarack should position the facility for additional growth in the future.

Other parts of the industry have also shown considerable growth in recent years. For example, the Hatfield-McCoy Trails has opened over 500 miles of trails in Logan, Mingo, Boone, and Wyoming counties since 2001. Trail user permits have grown from 4,000 in 2001 to an estimated 26,500 in 2006 (Chart 11). User permit sales have grown to nearly \$750,000 (Chart 12) and additional associated private sector investments have resulted.

¹¹ Data provided by Snowshoe Mountain, January 2007.

Some segments of the industry, however, may have reached a plateau in terms of visitation. The West Virginia whitewater rafting industry had 257,446 visitors in 1995 at its peak (Chart 13), the highest point since 1990¹². In 2000 visitation was 249,759 but dropped to 201,358 in 2006. In response, however, many outfitting companies have diversified into other areas including lodging, rock climbing, horseback riding, mountain biking,

Other significant capital investments have been made in the travel and tourism industry. One of the most significant investments currently underway is the \$50 million renovation of The Greenbrier Resort. The resort closed in January 2007 for the first phase of the renovation and will reopen in April. The entire renovation is estimated to take three years to complete.

One emerging trend is the increasing number of second home communities being developed in West Virginia. The prime example of a development already in place is the Greenbrier Sporting Club, developed around The Greenbrier Resort. This development features luxury homes and gated communities that attract visitors from all over the U.S. In 2005 Land Resource Companies, LLC announced the development of a planned community in Fayette County. This development is situated on 4,300 acres near the New River Gorge and features numerous planned amenities. While the construction of the infrastructure and residences has a significant economic impact on both the Fayette County economy and the state as a whole, the residents attracted to this development will undoubtedly contribute to additional growth in the leisure and hospitality, retail trade and service sectors.¹³

¹² Information provided by the West Virginia Department of Natural Resources.

¹³ Randall A. Childs, *Economic Impact of Roaring River*, Bureau of Business and Economic Research, West Virginia University, July 2005.

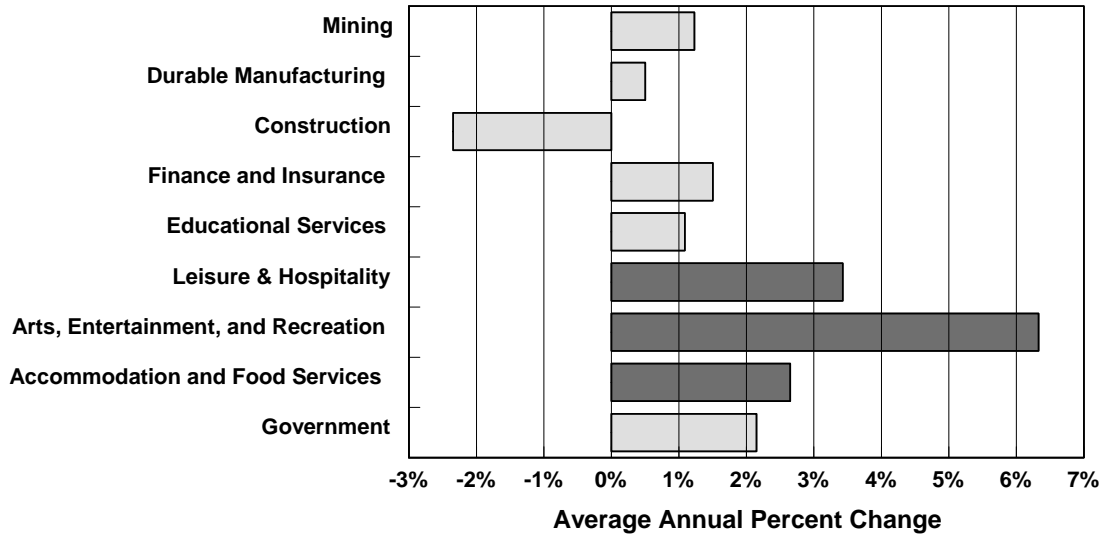
Conclusions

This study has examined comparative economic data on West Virginia gross Domestic product and employment by detailed industry over the period 1980-2006. During this period the economic contributions of the mining and manufacturing sectors declined in relative importance. On the other hand, traditional travel and tourism sectors showed sustained growth, particularly after the events of September 11, 2001.

The study has also reviewed economic forecasts provided by Global Insight and the WVU Bureau of Business and Economic Research. These forecasts of industry trends show the continued growth in leisure and hospitality at growth rates above the state average job growth.

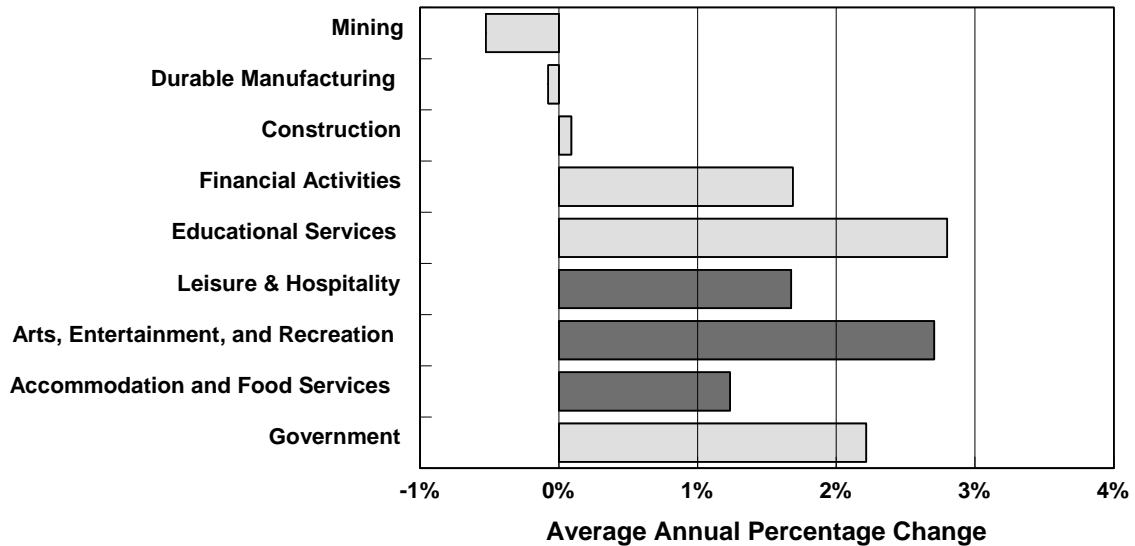
Selective evidence on some key parts of the industry illustrates the continued investments being made in the industry that will position travel and tourism for additional economic growth. When coupled with continued second home development in the state, the outlook for the industry is very positive.

Chart 1 Growth In West Virginia Real Gross Domestic Product By Selected Industry (1990-2005)



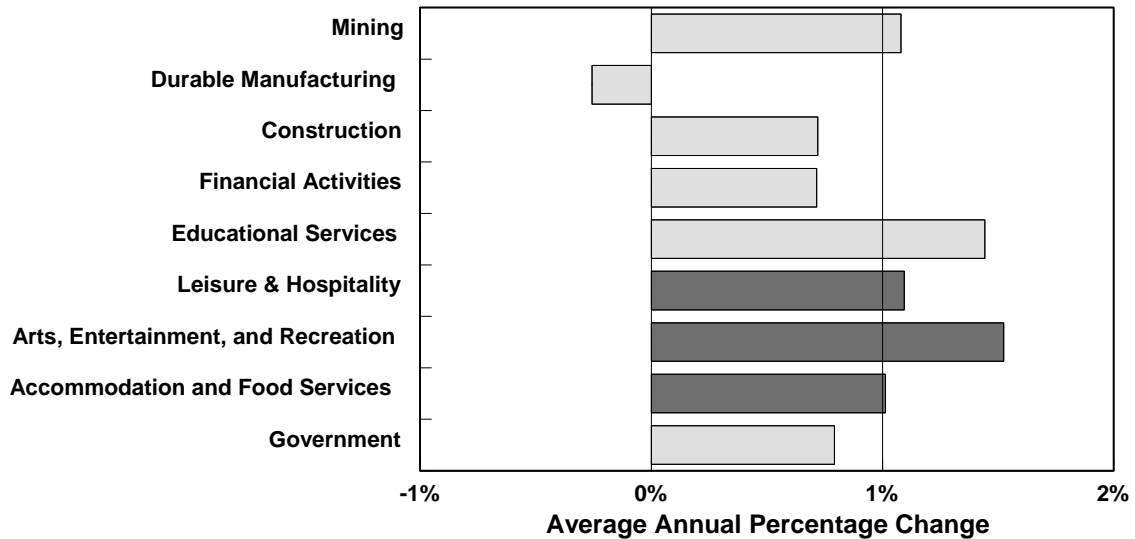
Source: Global Insight, October 2006 (www.globalinsight.com)
 Leisure and Hospitality: Aggregate Series of Arts, Entertainment, and Recreation and Accommodation and Food Services

Chart 2 Forecast Growth In West Virginia Real Gross Domestic Product By Selected Industries (2006-2036)



Source: Global Insight, October 2006 (www.globalinsight.com)
 *Leisure and Hospitality: Aggregate Series of Arts, Entertainment, and Recreation and Accommodation and Food Services

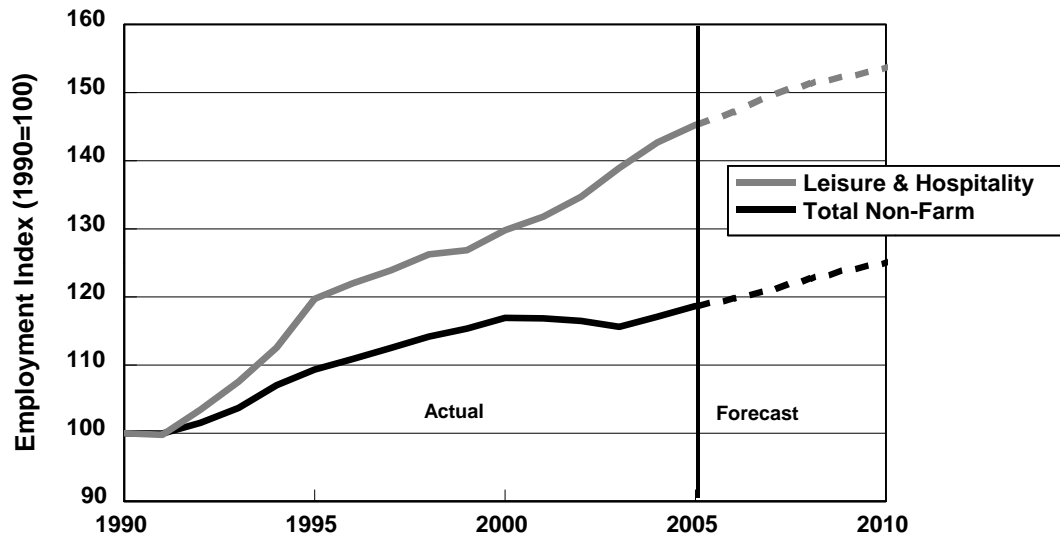
**Chart 3 Forecast Growth In West Virginia
Employment By Selected Industry (2006-2010)**



Source: Global Insight, October 2006 (www.globalinsight.com)

*Leisure and Hospitality: Aggregate Series of Arts, Entertainment ,and Recreation and Accommodation and Food Seviles

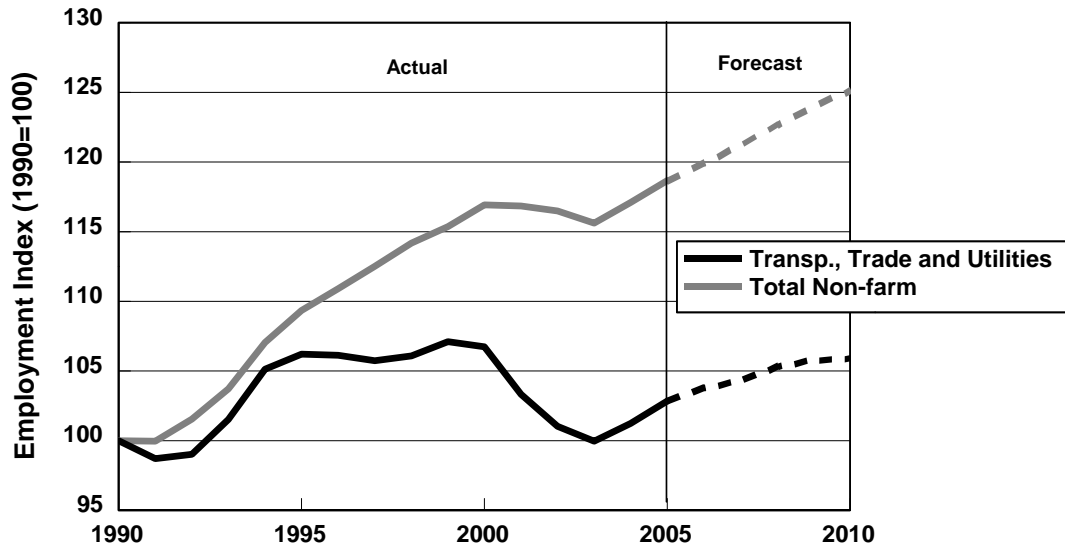
**Chart 4 West Virginia Leisure and Hospitality
Employment Index (1990-2010)**



Source: Global Insight, October 2006 (www.globalinsight.com)

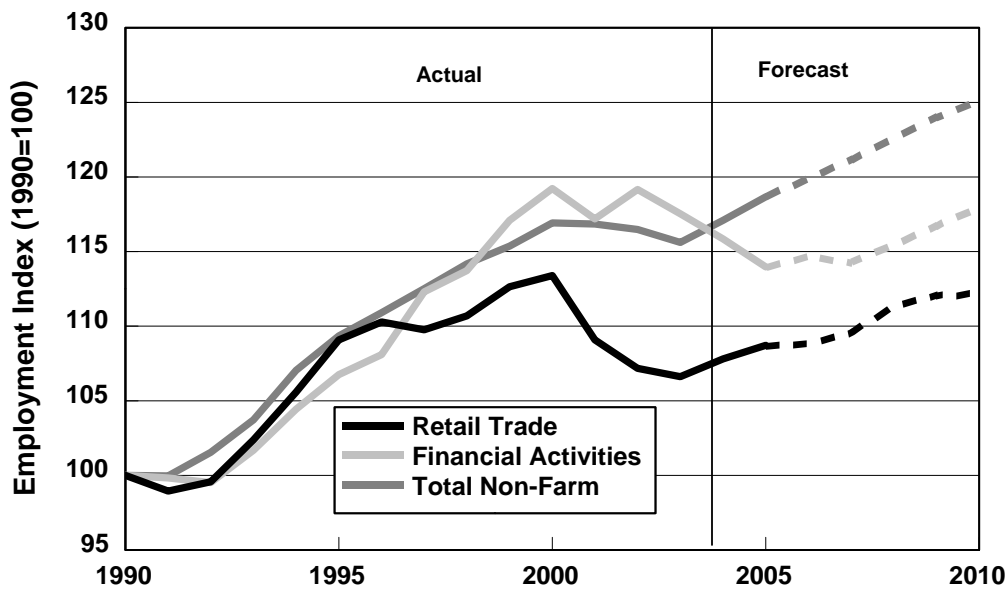
*Leisure and Hospitality: Aggregate Series of Arts, Entertainment ,and Recreation and Accommodation and Food Seviles

Chart 5 West Virginia Transportation, Trade and Utilities Employment Index (1990-2010)



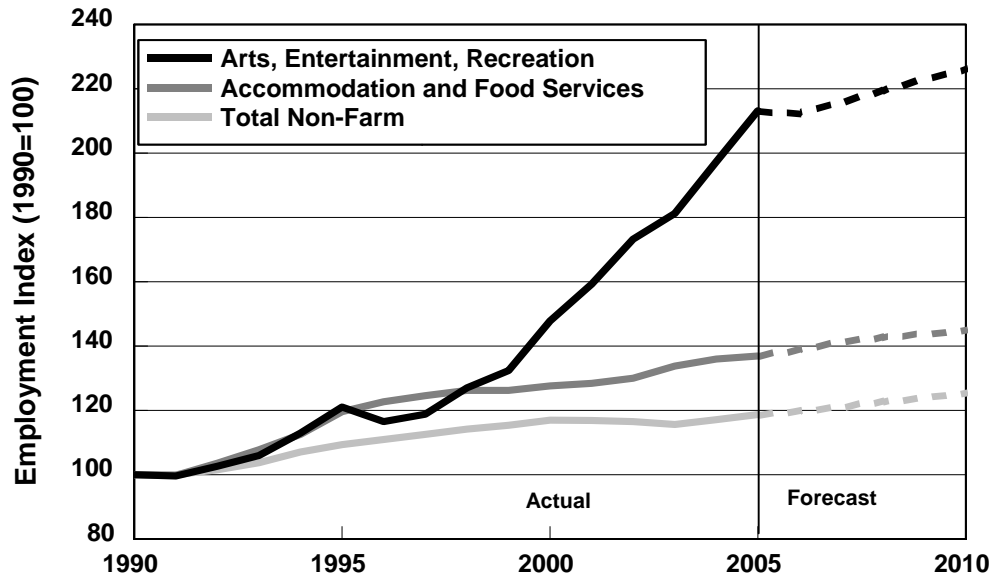
Source: Global Insight, October 2006 (www.globalinsight.com)

Chart 6 West Virginia Retail Trade and Financial Activities Employment Index (1990-2010)



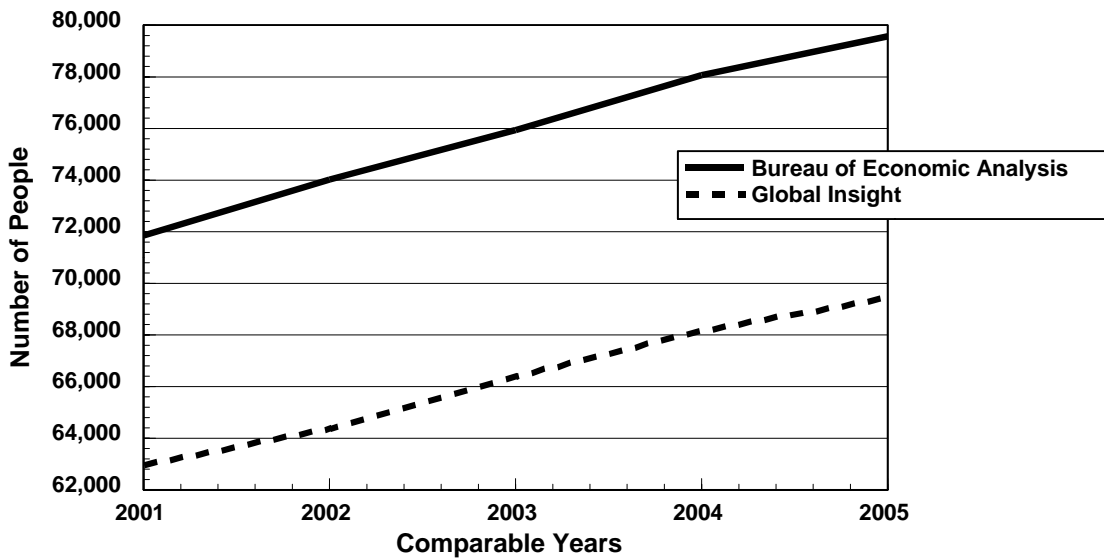
Source: Global Insight, October 2006 (www.globalinsight.com)

Chart 7 West Virginia Accommodation and Entertainment Employment Index (1990-2010)



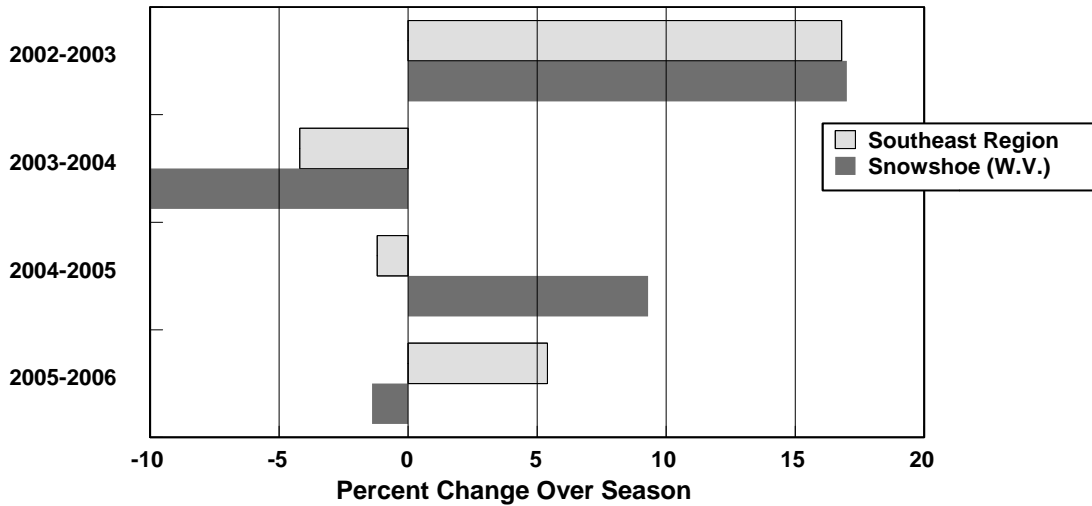
Source: Global Insight, October 2006 (www.globalinsight.com)

Chart 8 West Virginia Leisure and Hospitality Employment: BEA and Global Insight (2001-2005)



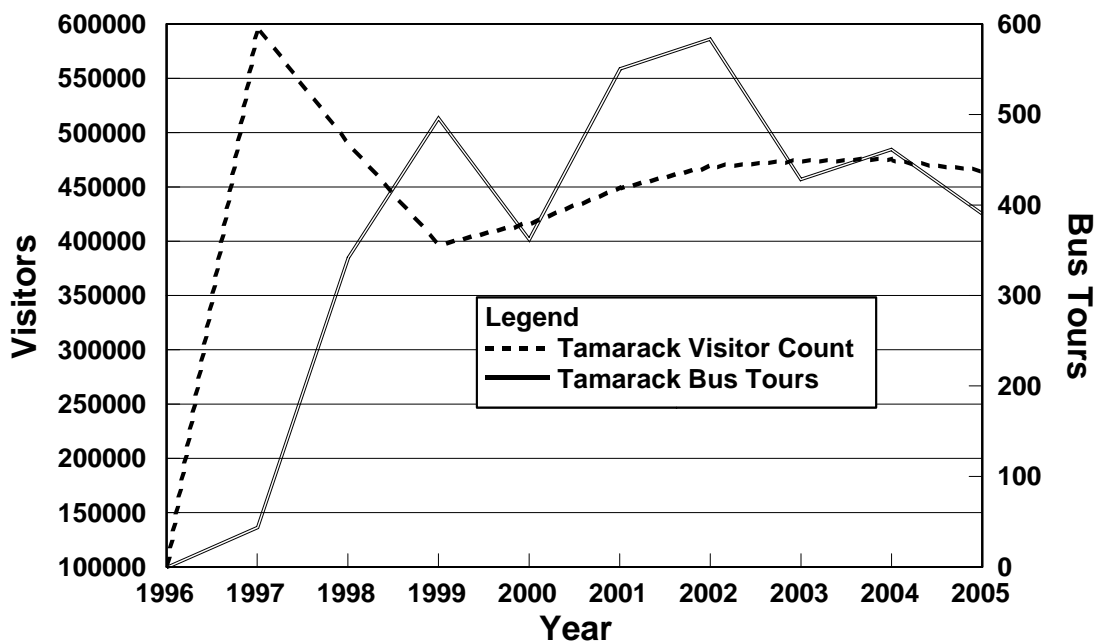
Source: Bureau of Economic Analysis, September 2006 (www.bea.gov)
Global Insight, October 2006 (www.globalinsight.com)

Chart 9 Total Ski-Days Change From Prior Season, Southeast Region and Snowshoe, Selected Seasons

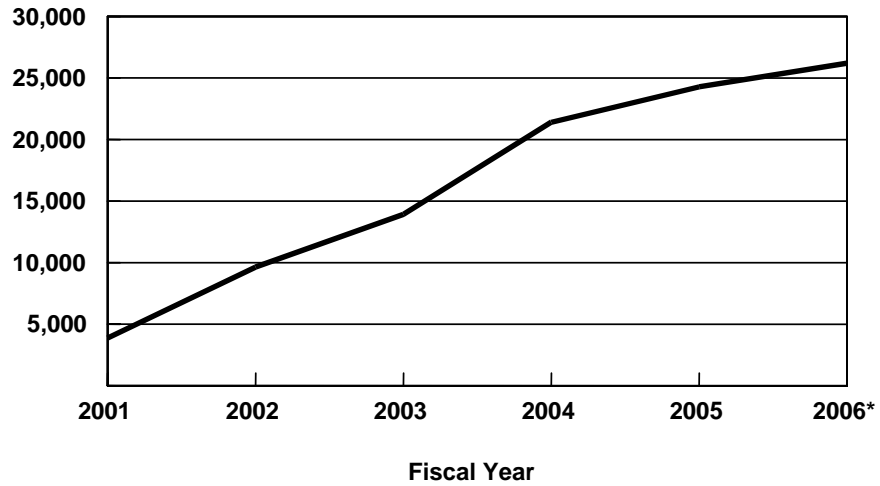


*Source: National Ski Association
Snowshoe Mountain Data

Chart 10 Tamarack Visitor Growth, 1996-2005

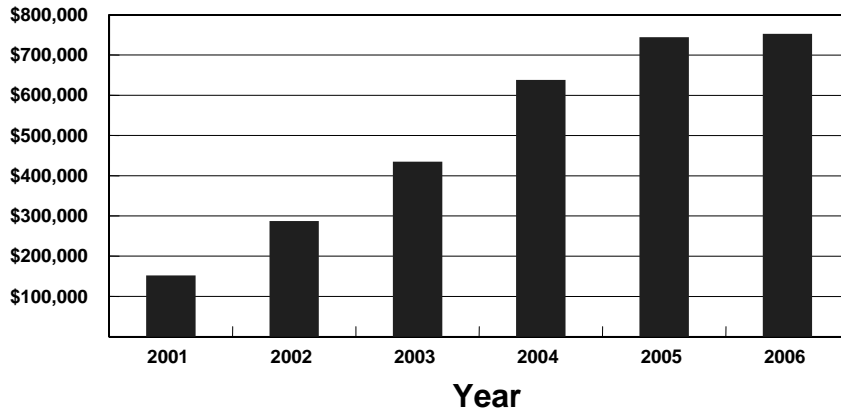


**Chart 11 Hatfield and McCoy Trails
Total User Permits Sold, 2001-2006**



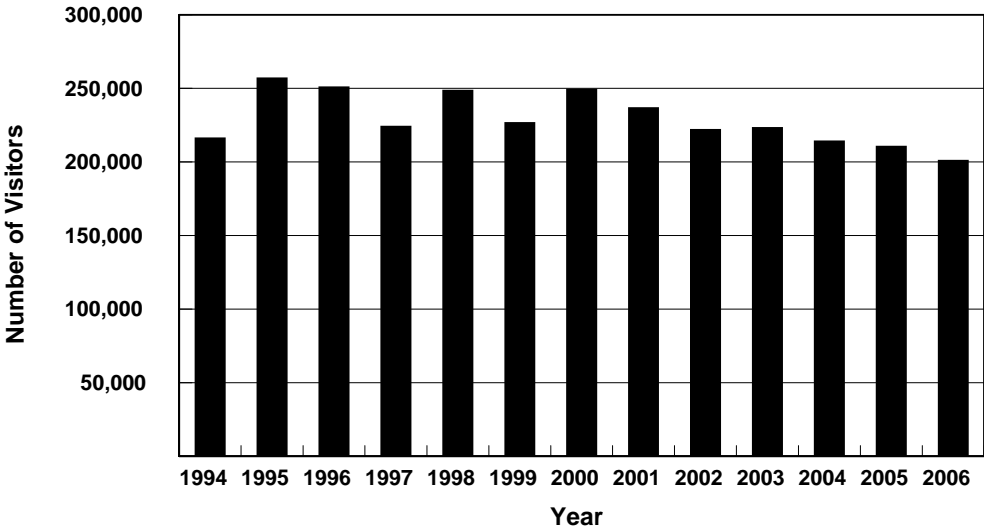
Source: Hatfield-McCoy Regional Recreation Authority
*Note: Number for 2006= 26,200 (Estimate based on sales)

**Chart 12 Hatfield and McCoy Trails
User Permit Sales, 2001-2006**



Source: Hatfield-McCoy Regional Recreation Authority

**Chart 13 West Virginia
Whitewater Rafting Visitation (1994-2004)**



Source: West Virginia Department of Natural Resources

Table 1 Detailed Industry Data From Gross Domestic Product Series

Private industries	Pipeline transportation
Agriculture, forestry, fishing, and hunting	Other transportation and support activities
Crop and animal production (Farms)	Warehousing and storage
Forestry, fishing, and related activities	Information
Mining	Publishing including software
Oil and gas extraction	Motion picture and sound recording industries
Mining, except oil and gas	Broadcasting and telecommunications
Support activities for mining	Information and data processing services
Utilities	Finance and insurance
Construction	Federal Reserve banks, credit intermediation and related
Manufacturing	Securities, commodity contracts, investments
Durable goods	Insurance carriers and related activities
Wood product manufacturing	Funds, trusts, and other financial vehicles
Nonmetallic mineral product manufacturing	Real estate, rental, and leasing
Primary metal manufacturing	Real estate
Fabricated metal product manufacturing	Rental and leasing services and lessors of intangible ass.
Machinery manufacturing	Professional and technical services
Computer and electronic product manufacturing	Legal services
Electrical equipment and appliance manufacturing	Computer systems design and related services
Motor vehicle, body, trailer, and parts manuf.	Other professional, scientific and technical services
Other transportation equipment manufacturing	Management of companies and enterprises
Furniture and related product manufacturing	Administrative and waste services
Miscellaneous manufacturing	Administrative and support services
Nondurable goods	Waste management and remediation services
Food product manufacturing	Educational services
Textile and textile product mills	Health care and social assistance
Apparel manufacturing	Ambulatory health care services
Paper manufacturing	Hospitals and nursing and residential care facilities
Printing and related support activities	Social assistance
Petroleum and coal products manufacturing	Arts, entertainment, and recreation
Chemical manufacturing	Performing arts, museums, and related activities
Plastics and rubber products manufacturing	Amusements, gambling, and recreation
Wholesale trade	Accommodation and food services
Retail trade	Accommodation
Transportation and warehousing, excluding UPS	Food services and drinking places
Air transportation	Other services, except government
Rail transportation	Government
Water transportation	Federal civilian
Truck transportation	Federal military
Transit and ground passenger transportation	State and local

Source: Bureau of Economic Analysis, U.S. Department of Commerce, www.bea.gov/bea/gsp

Industries in bold italics contain significant portions of the travel and tourism industry.

Notes: Industries listed are based upon the NAICS industry classification. Global Insight and WVU Bureau of Business and Economic Research aggregate **Arts, entertainment, and recreation and Accommodation and food services** into a series called **Leisure and hospitality**.

Table 2 West Virginia Gross Domestic Product 1990-2005 (millions of current dollars)					
Industry	1990	1995	2000	2005	Average Annual % Change (1990-2005)
Agriculture, Forestry, & Fishing	209	225	265	271	1.8%
Mining	3,237	3,064	2,843	4,456	2.2%
Construction	1,538	1,717	1,704	2,182	2.4%
Manufacturing	4,813	5,955	5,648	5,543	0.9%
Durables	2,275	2,725	3,038	3,155	2.2%
Non-Durables	2,538	3,230	2,610	2,388	-0.4%
Wholesale Trade	1,272	1,691	1,997	2,591	4.9%
Retail Trade	2,087	2,847	3,404	4,252	4.9%
Transportation & Warehousing	1,211	1,570	1,456	1,885	3.0%
Utilities	1,694	2,259	1,999	2,416	2.4%
Information	740	980	1,085	1,462	4.6%
Finance and Insurance	883	1,205	1,564	2,128	6.0%
Real Estate and Rental and Leasing	2,383	3,030	3,681	4,729	4.7%
Professional, Scientific, and Technical Services	792	1,142	1,426	2,067	6.6%
Management of Companies and Enterprises	106	161	201	378	8.8%
Admin., Support and Waste Management	380	612	817	1,111	7.4%
Educational Services	105	167	213	258	6.2%
Health Care and Social Assistance	1,944	2,991	3,784	5,034	6.5%
<i>Leisure & Hospitality</i>	761	1,042	1,490	1,996	6.6%
<i>Arts, Entertainment, and Recreation</i>	125	188	317	533	10.1%
<i>Accommodation and Food Services</i>	636	854	1,173	1,463	5.7%
Other Services	651	872	1,010	1,280	4.6%
Government	3,851	5,298	6,890	9,010	5.8%
State and Local Government	2,997	4,048	5,057	6,345	5.1%
Gross Domestic Product	28,659	36,830	41,477	53,049	4.2%

Source: Global Insight, WV Fall Forecast. www.globalinsight.com. Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification. Italicized and bold sectors make up travel and tourism.

Table 3 West Virginia Tourism Related Industries Gross State Product 1998-2005 (millions of current dollars)									
Industry	1998	1999	2000	2001	2002	2003	2004	2005	Average Annual % Change (1998-2005)
Leisure and Hospitality	1,283	1,386	1,490	1,559	1,689	1,792	1,885	1,996	6.5%
Arts, entertainment, and recreation	243	266	317	357	426	453	491	533	11.9%
Performing arts, museums, and related activities	118	130	163	188	191	209	124	n/a	0.8%
Amusements, gambling, and recreation	125	136	154	169	235	243	367	n/a	19.7%
Accommodation and food services	1,040	1,120	1,173	1,202	1,263	1,339	1,394	1,463	5.0%
Accommodation	332	369	394	384	404	435	444	n/a	5.0%
Food services and drinking places	709	752	779	818	859	904	949	n/a	5.0%
Total West Virginia GDP	39,500	41,105	41,476	43,365	45,032	46,645	49,903	53,050	4.3%

Source: Bureau of Economic Analysis, U.S. Department of Commerce. <http://www.bea.gov/bea/regional/gsp>. Last revised: October 26, 2006.

Notes: Uses NAICS system of industrial classification

n/a not available

Table 4 West Virginia Real Gross Domestic Product 1990-2005 (millions of 2000 dollars)					
Industry	1990	1995	2000	2005	Average Annual % Change (1990-2005)
Agriculture, Forestry, & Fishing	198	187	265	249	1.5%
Mining	2,393	2,638	2,843	2,874	1.2%
Construction	2,335	2,251	1,704	1,635	-2.3%
Manufacturing	5,853	6,176	5,649	5,035	-1.0%
Durables	2,728	2,817	3,038	2,941	0.5%
Non-Durables	3,128	3,363	2,611	2,123	-2.6%
Wholesale Trade	1,241	1,550	1,997	2,446	4.6%
Retail Trade	2,073	2,673	3,404	4,214	4.8%
Transportation & Warehousing	1,313	1,672	1,456	1,561	1.2%
Utilities	1,896	2,211	1,999	2,078	0.6%
Information	757	951	1,085	1,575	5.0%
Finance and Insurance	1,464	1,489	1,563	1,831	1.5%
Real Estate and Rental and Leasing	3,164	3,528	3,681	4,115	1.8%
Professional, Scientific, and Technical Services	1,115	1,308	1,426	1,816	3.3%
Management of Companies and Enterprises	183	217	201	335	4.1%
Admin., Support and Waste Management	543	751	816	974	4.0%
Educational Services	162	213	213	190	1.1%
Health Care and Social Assistance	2,981	3,547	3,784	4,180	2.3%
Leisure & Hospitality	1,032	1,223	1,490	1,711	3.4%
Arts, Entertainment, and Recreation	180	231	317	451	6.3%
Accommodation and Food Services	851	991	1,173	1,260	2.6%
Other Services	987	1,101	1,010	1,029	0.3%
Government	5,359	6,085	6,890	7,375	2.2%
State and Local Government	4,131	4,634	5,057	5,262	1.6%
Gross Domestic Product	34,824	39,684	41,476	45,149	1.7%

Source: Global Insight, WV Fall Forecast. www.globalinsight.com

Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification

Table 5 West Virginia Tourism Related Industries Real Gross State Product 1998-2005 (millions of 2000 dollars)									
Industry	1998	1999	2000	2001	2002	2003	2004	2005	Average Annual % Change (1998-2005)
Leisure and Hospitality	1,368	1,433	1,490	1,500	1,566	1,636	1,667	1,711	3.2%
Arts, entertainment, and recreation	268	280	317	341	394	406	429	451	7.7%
Performing arts, museums, and related activities	134	138	163	179	175	185	106	n/a	-3.8%
Amusements, gambling, and recreation	135	141	154	162	219	221	327	n/a	15.9%
Accommodation and food services	1,100	1,153	1,173	1,159	1,172	1,230	1,238	1,260	2.0%
Accommodation	356	381	394	375	393	417	403	n/a	2.1%
Food services and drinking places	744	772	779	784	779	814	835	n/a	1.9%
Total West Virginia Real GDP	40,832	42,032	41,476	41,922	42,453	42,880	44,280	45,190	1.5%

Source: Bureau of Economic Analysis, U.S. Department of Commerce. <http://www.bea.gov/bea/regional/gsp>. Last revised: October 26, 2006.

Notes: Uses NAICS system of industrial classification; n/a not available

Table 6 West Virginia Real Gross Domestic Product Index 1990-2005 (Year 2000=100)				
Industry	1990	1995	2000	2005
Agriculture, Forestry, & Fishing	74.7	70.6	100.0	94.1
Mining	84.2	92.8	100.0	101.1
Construction	137.0	132.1	100.0	96.0
Manufacturing	103.6	109.3	100.0	89.1
Durables	89.8	92.7	100.0	96.8
Non-Durables	119.8	128.8	100.0	81.3
Wholesale Trade	62.1	77.6	100.0	122.5
Retail Trade	60.9	78.5	100.0	123.8
Transportation & Warehousing	90.2	114.8	100.0	107.2
Utilities	94.8	110.6	100.0	104.0
Information	69.8	87.7	100.0	145.2
Finance and Insurance	93.7	95.3	100.0	117.1
Real Estate and Rental and Leasing	85.9	95.8	100.0	111.8
Professional, Scientific, and Technical Services	78.2	91.7	100.0	127.4
Management of Companies and Enterprises	90.8	107.8	100.0	166.7
Admin., Support and Waste Management	66.5	92.1	100.0	119.3
Educational Services	75.9	100.2	100.0	89.2
Health Care and Social Assistance	78.8	93.7	100.0	110.5
Leisure & Hospitality	69.3	82.1	100.0	114.9
Arts, Entertainment, and Recreation	56.7	72.8	100.0	142.2
Accommodation and Food Services	72.6	84.5	100.0	107.4
Other Services	97.7	109.0	100.0	101.9
Government	77.8	88.3	100.0	107.0
State and Local Government	81.7	91.6	100.0	104.0
Gross Domestic Product	84.0	95.7	100.0	108.9

Source: Global Insight, WV Fall Forecast. www.globalinsight.com

Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification

Table 7 West Virginia Tourism Related Industries Real Gross Domestic Product Index 1998-2005 (Year 2000=100)								
Industry	1998	1999	2000	2001	2002	2003	2004	2005
Leisure and Hospitality	91.8	96.2	100.0	100.7	105.1	109.8	111.9	114.8
Arts, entertainment, and recreation	84.7	88.3	100.0	107.6	124.2	128.1	135.4	142.4
Performing arts, museums, and related activities	82.0	84.9	100.0	109.6	107.6	113.5	64.9	n/a
Amusements, gambling, and recreation	87.5	91.8	100.0	105.4	141.9	143.6	212.5	n/a
Accommodation and food services	93.8	98.3	100.0	98.8	99.9	104.8	105.5	107.4
Accommodation	90.3	96.6	100.0	95.1	99.7	105.7	102.3	n/a
Food services and drinking places	95.6	99.2	100.0	100.6	100.0	104.5	107.2	n/a
Total West Virginia Real GDP	98.4	101.3	100.0	101.1	102.4	103.4	106.8	109.0

Source: Bureau of Economic Analysis, U.S. Department of Commerce. <http://www.bea.gov/bea/regional/gsp>. Last revised: October 26, 2006.

Notes: Uses NAICS system of industrial classification

n/a not available

Table 8 West Virginia Real Gross Domestic Product 1990-2005 (percent by sector)				
Industry	1990	1995	2000	2005
Agriculture, Forestry, & Fishing	0.6	0.5	0.6	0.6
Mining	6.9	6.6	6.9	6.4
Construction	6.7	5.7	4.1	3.6
Manufacturing	16.8	15.6	13.6	11.2
Durables	7.8	7.1	7.3	6.5
Non-Durables	9.0	8.5	6.3	4.7
Wholesale Trade	3.6	3.9	4.8	5.4
Retail Trade	6.0	6.7	8.2	9.3
Transportation & Warehousing	3.8	4.2	3.5	3.5
Utilities	5.4	5.6	4.8	4.6
Information	2.2	2.4	2.6	3.5
Finance and Insurance	4.2	3.8	3.8	4.1
Real Estate and Rental and Leasing	9.1	8.9	8.9	9.1
Professional, Scientific, and Technical Services	3.2	3.3	3.4	4.0
Management of Companies and Enterprises	0.5	0.5	0.5	0.7
Admin., Support and Waste Management	1.6	1.9	2.0	2.2
Educational Services	0.5	0.5	0.5	0.4
Health Care and Social Assistance	8.6	8.9	9.1	9.3
Leisure & Hospitality	3.0	3.1	3.6	3.8
Arts, Entertainment, and Recreation	0.5	0.6	0.8	1.0
Accommodation and Food Services	2.4	2.5	2.8	2.8
Other Services	2.8	2.8	2.4	2.3
Government	15.4	15.3	16.6	16.3
State and Local Government	11.9	11.7	12.2	11.7
Gross Domestic Product	100.0	100.0	100.0	100.0

Source: Global Insight, WV Fall Forecast. www.globalinsight.com

Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification

Industry	2001	2002	2003	2004	2005	Average Annual Percent Change (2001-2005)	
						WV	US
Forestry, fishing, related activities, and other	4,254	4,353	3,944	4,043	3,948	-1.8%	-1.7%
Mining	28,210	27,260	27,632	28,483	30,969	2.4%	1.1%
Utilities	7,003	6,799	6,422	6,386	6,381	-2.3%	-2.1%
Construction	51,149	49,208	48,469	51,308	54,317	1.5%	1.7%
Manufacturing	74,820	71,209	67,115	65,786	65,093	-3.4%	-3.5%
Durables	46,293	44,055	41,411	41,132	41,213	-2.9%	-3.5%
Non-durables	28,527	27,154	25,704	24,654	23,880	-4.3%	-3.6%
Wholesale trade	26,363	25,482	24,543	25,398	26,494	0.1%	0.1%
Retail trade	111,678	110,727	110,436	111,852	112,992	0.3%	0.1%
Transportation and warehousing	25,678	25,155	24,269	25,024	25,545	-0.1%	-0.2%
Information	15,256	14,085	14,036	13,280	13,267	-3.4%	-3.9%
Finance and insurance	27,988	28,867	27,668	27,104	26,724	-1.1%	1.1%
Real estate and rental and leasing	19,941	20,226	20,043	21,812	23,333	4.0%	1.0%
Professional and technical services	35,870	36,476	36,675	38,201	39,591	2.5%	0.6%
Management of companies and enterprises	2,968	3,092	3,390	3,758	4,005	7.8%	0.5%
Administrative and waste services	39,463	38,539	38,534	39,936	40,471	0.6%	1.1%
Educational services	11,882	12,179	12,242	12,396	12,711	1.7%	3.0%
Health care and social assistance	106,641	110,241	111,128	113,269	115,019	1.9%	2.5%
Leisure & Hospitality	71,850	74,019	75,939	78,067	79,571	2.6%	1.7%
Arts, entertainment, and recreation	13,428	14,801	14,826	16,045	17,186	6.4%	1.2%
Performing arts and spectator sports	7,320	(D)	(D)	4,748	(D)	n/a	n/a
Museums, historical sites, zoos, and parks	197	(D)	(D)	170	(D)	n/a	**0.3%
Amusement, gambling, and recreation	5,911	9,431	10,230	11,127	12,133	19.7%	1.5%
Accommodation and food services	58,422	59,218	61,113	62,022	62,385	1.7%	1.8%
Accommodation	10,188	10,243	10,373	10,395	10,212	0.1%	-0.2%
Food services and drinking places	48,234	48,975	50,740	51,627	52,173	2.0%	2.3%
Other services, except public administration	50,608	52,217	52,154	55,107	55,479	2.3%	1.0%
Government and government enterprises	148,645	150,420	150,827	151,577	151,621	0.5%	0.7%
State and local	117,270	118,958	118,773	119,669	119,677	0.5%	0.9%
Total employment	883,128	883,652	878,509	895,680	909,945	0.8%	0.4%

Source: Bureau of Economic Analysis, U.S. Department of Commerce, Regional Economic Information System, <http://www.bea.gov/bea/regional/spi> September 2006.

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the total.

n/a not available.

*Leisure and Hospitality refers to an aggregate series including Arts, entertainment, and recreation and Accommodation and food services.

**Performing arts and spectator sports and museums, Historical sites, zoos, and parks are aggregated in one series at the national level.

Table 10 West Virginia Real Gross Domestic Product Forecast 2006-2011 (millions of 2000 dollars)

Industry	2006	2007	2008	2009	2010	2011	Average Annual Percent Change (2006-2011)
Forestry, fishing, related activities, and other	253	252	253	255	256	257	0.3%
Mining	2,963	3,046	3,094	3,096	3,083	3,062	0.7%
Utilities	2,069	2,087	2,124	2,163	2,202	2,236	1.6%
Construction	1,671	1,669	1,674	1,684	1,692	1,697	0.3%
Manufacturing	5,092	5,168	5,271	5,404	5,553	5,715	2.3%
Durables	2,971	2,974	2,972	2,978	2,989	3,008	0.2%
Non-durables	2,150	2,221	2,323	2,446	2,579	2,719	4.8%
Wholesale trade	2,521	2,578	2,657	2,739	2,820	2,897	2.8%
Retail trade	4,308	4,424	4,602	4,772	4,937	5,097	3.4%
Transportation and warehousing	1,601	1,620	1,648	1,679	1,709	1,736	1.6%
Information	1,613	1,645	1,697	1,753	1,808	1,859	2.9%
Finance and insurance	1,879	1,888	1,928	1,974	2,023	2,063	1.9%
Real estate and rental and leasing	4,160	4,198	4,286	4,380	4,475	4,561	1.9%
Professional and technical services	1,893	1,959	2,049	2,144	2,240	2,332	4.3%
Management of companies and enterprises	354	371	394	419	444	468	5.7%
Administrative and waste services	1,006	1,041	1,098	1,161	1,225	1,287	5.0%
Educational services	192	196	203	210	217	223	3.1%
Health care and social assistance	4,251	4,326	4,428	4,544	4,640	4,741	2.2%
Leisure & Hospitality	1,735	1,762	1,803	1,844	1,887	1,926	2.1%
<i>Arts, entertainment, and recreation</i>	<i>460</i>	<i>472</i>	<i>489</i>	<i>506</i>	<i>524</i>	<i>540</i>	<i>3.3%</i>
<i>Accommodation and food services</i>	<i>1,274</i>	<i>1,290</i>	<i>1,313</i>	<i>1,336</i>	<i>1,362</i>	<i>1,385</i>	<i>1.7%</i>
Other services, except public administration	1,041	1,049	1,064	1,081	1,098	1,112	1.3%
Government and government enterprises	7,485	7,614	7,818	8,031	8,245	8,433	2.4%
State and local	5,296	5,381	5,516	5,654	5,791	5,916	2.2%
Total Gross Domestic Product	46,020	46,826	47,991	49,177	50,341	51,430	2.2%

Source: Global Insight, WV Fall Forecast. www.globalinsight.com

Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification

Table 11 West Virginia Employment by Industry Forecast 2006-2011 (Global Insight)							
Industry	2006	2007	2008	2009	2010	2011	Average Annual Percent Change (2006-2011)
Forestry, fishing, related activities, and other	3,807	3,876	3,921	3,971	4,009	4,037	1.2%
Mining	27,390	29,001	29,819	29,626	28,593	27,222	-0.1%
Utilities	6,035	6,007	5,864	5,763	5,685	5,604	-1.5%
Construction	39,141	39,494	39,605	40,040	40,281	40,569	0.7%
Manufacturing	61,424	61,191	60,704	60,407	60,154	60,055	-0.4%
Durables	38,518	38,521	38,316	38,210	38,125	38,181	-0.2%
Non-durables	22,905	22,670	22,389	22,198	22,029	21,874	-0.9%
Wholesale trade	25,174	25,417	25,512	25,608	25,769	25,947	0.6%
Retail trade	89,520	90,143	91,599	92,154	92,251	92,263	0.6%
Transportation and warehousing	19,935	19,849	19,855	19,874	19,865	19,860	-0.1%
Information	11,732	11,671	11,671	11,759	11,745	11,795	0.1%
Finance and insurance	22,672	22,585	22,805	23,060	23,315	23,466	0.7%
Real estate and rental and leasing	7,338	7,320	7,399	7,483	7,563	7,620	0.8%
Professional and technical services	24,906	25,885	26,479	27,054	27,598	28,150	2.5%
Management of companies and enterprises	3,569	3,494	3,504	3,500	3,469	3,428	-0.8%
Administrative and waste services	30,908	31,139	32,532	34,206	35,847	37,406	3.9%
Educational services	11,289	11,411	11,493	11,518	11,455	11,333	0.1%
Health care and social assistance	103,564	105,310	107,072	108,990	110,172	111,498	1.5%
Leisure & Hospitality	70,367	71,543	72,293	72,808	73,498	74,134	1.0%
Arts, entertainment, and recreation	11,139	11,284	11,485	11,684	11,834	11,944	1.4%
Accommodation and food services	59,228	60,259	60,808	61,124	61,664	62,191	1.0%
Other services, except public administration	56,202	57,470	59,022	60,639	62,268	63,924	2.6%
Government and government enterprises	143,266	143,501	144,555	146,089	147,858	148,199	0.7%
State and local	121,309	121,257	121,840	122,809	123,492	123,987	0.4%
Total employment	754,432	762,430	771,783	780,577	787,388	792,475	1.0%

Source: Global Insight, WV Fall Forecast. www.globalinsight.com

Last Revised: October, 2006.

Notes: Uses NAICS system of industrial classification

Table 12 West Virginia Employment Forecasts 2006-2011 by WVU BBER (Thousands)			
Indicator	Annual Growth		
	West Virginia*	West Virginia* (%)	US* (%)
Total Jobs	6.6	0.9	1.2
Goods Producing	0.4	0.3	-0.0
Natural Res. & Mining	0.0	0.1	-1.5
Mining	0.1	0.3	-1.5
Coal Mining	-0.1	-0.8	n/a
Other Mining	0.2	2.5	n/a
Natural Resources	-0.0	-5.6	-2.0
Construction	0.4	1.1	0.9
Manufacturing	-0.1	-0.1	-0.5
Durable Mfg.	0.2	0.5	-0.3
Wood Products	0.3	2.9	-0.9
Nonmetallic Minerals	-0.0	-0.6	-0.1
Primary Metals	-0.1	-1.8	-1.3
Fabricated Metals	0.0	0.6	1.3
Trans. Equip.	0.1	2.5	0.6
Other Durables	-0.1	-1.8	-1.3
Non-Durable Mfg.	-0.3	-1.2	-0.6
Food Products	0.0	0.2	1.2
Chemicals	-0.3	-3.1	-0.6
Plastics & Rubber	0.2	3.3	-1.0
Other Non-Durables	-0.1	-3.0	-1.9
Service Producing	6.2	1.0	1.5
Trade, Trans., & Utilities	0.8	0.5	1.1
Wholesale Trade	0.1	0.4	0.9
Retail Trade	0.6	0.6	0.7
Utilities	-0.0	-0.5	-1.3
Transportation & Warehousing	0.1	0.5	2.7
Information	-0.1	-1.0	0.5
Financial Activities	0.2	0.8	1.1
Profess. & Business Services	1.4	2.4	3.4
Educational & Health Services	2.0	1.6	1.4
Educational Services	0.2	1.8	0.2
Health Care & Social Assist.	1.7	1.6	1.6
Leisure & Hospitality	1.1	1.5	1.4
Other Services	0.4	0.6	0.6
Government	0.5	0.3	1.0
Federal Civilian	0.1	0.3	0.1
State & Local	0.4	0.3	1.1

Source: George W. Hammond, *West Virginia Economic Outlook 2007*, Bureau of Business and Economic Research, West Virginia University, November 2006.

*These columns contain the average yearly change during the 2006-2011 period.