

Tucker County Tourism Business Trends and Impacts

Project Report

January, 2017

Prepared by

Daniel Eades, Extension Specialist
Community, Economic & Workforce Development
West Virginia University
Morgantown, WV 26505

Executive Summary

- Leisure and Hospitality businesses employ one-fifth of the Tucker County workforce and represent more than a quarter (27%) of all private employment in the county.
- Tucker County’s tourism businesses generate an estimated \$65 million in direct sales annually. These sales support **970 local jobs** and generate **\$44 million in income and taxes**, including more than **\$19 million in local wages and proprietors’ incomes**.

Impact Type	Employment	Labor Income	Value Added	Output
Direct Effect	824	\$15,260,385	\$34,919,903	\$65,110,616
Indirect Effect	80	\$2,331,301	\$5,019,564	\$9,435,724
Induced Effect	67	\$1,779,585	\$4,063,694	\$6,677,223
Total Effect	970	\$19,371,272	\$44,003,161	\$81,223,563

- Response from local business owners suggest that tourism is, and will continue to be strong in the coming years. Business indicated that their sale had remained stable (39%) or increased (56%) over the past year; most anticipate that the county’s tourism industry will continue to grow (74%) or remain stable (16%) in 2017.

Background and Objectives

This report is one component of a larger initiative to guide the development of artistic, cultural, outdoor, and other recreational tourism attractions in Tucker County. It synthesizes primary and secondary data on the county’s tourism business trends, needs, opportunities, employment, and earnings. It also presents an economic impact of the industry for more informed project prioritization, policy recommendations, and future investment decisions.

Data from Workforce West Virginia’s Labor Market Information database and the Bureau of Labor Statistics’ Quarterly Census of Employment and Wages program identify 2,700 employees in Tucker County. Table 1 provides a breakdown of employment by industry for the county and the state as a whole.

Table 1. Employment by Industry, West Virginia and Tucker County, 2015

	West Virginia		Tucker County	
	Number of Employees	Share of Total Employment	Number of Employees	Share of Total Employment
Total, All Industries	696,194	100%	2,713	100%
Total, Private	559,172	80%	2,108	78%
Total Government	137,022	20%	605	22%
Goods Producing	106,957	15%	634	23%
Natural Resources & Mining	26,900	4%	233	9%
Construction	32,406	5%	161	6%
Manufacturing	47,652	7%	240	9%
Service Providing	452,215	65%	1,475	54%
Trade, Transportation, & Utilities	132,875	19%	293	11%
Information	9,625	1%	10	0%
Finance	24,885	4%	110	4%
Professional & Business Services	67,070	10%	47	2%
Education & Health Services	122,456	18%	348	13%
Leisure & Hospitality	74,581	11%	559	21%
Other Services	20,539	3%	108	4%
Sources: Workforce West Virginia, Employment and Wages, http://lmi.workforcewv.org/Employment_N_Wages/EnW.html Bureau of Labor Statistics, Quarterly Census of Employment and Wages, http://www.bls.gov/cew/ Authors Calculations				

The share of employment in many of the county's industries is comparable to state rates. However, a significantly greater share of the Tucker County workforce is employed by the Leisure and Hospitality sector. Leisure and Hospitality businesses employ one-fifth of the Tucker County workforce and represent more than a quarter (27%) of all private employment in the county. The most recent data (2014) from Dean-Runyan's West Virginia Travel Impacts report¹ estimated that tourism generates \$44.2 million in direct spending in the county, and supports 770 jobs², \$14.4 million in earnings, and contributes nearly \$800 thousand in local government revenue.

This study was undertaken to quantify tourism-based businesses' economic contribution to the Tucker County economy; encourage more effective engagement between tourism focused business and development entities through a better understanding of business's needs, motivations, and expectations; and establish a baseline to quantify the impact of tourism related policy decisions on local businesses going forward. Due to the limited scope and small sample size of the survey results should not be read or

¹ Dean-Runyan Associates. (2015). *West Virginia Travel Impacts 2000-2014p*. Available online: http://www.deanrunyan.com/doc_library/WVImp.pdf

² Dean-Runyan Associates' employment estimates include the Leisure and Hospitality sector, plus segments of the transportation, retail, and business service sectors.

quoted as absolute. However they do indicate trends and the hopes and concerns of participating businesses.

Methodology

West Virginia University Extension Service specialists designed the survey instrument (Appendix B) with input and approval from the Tucker County Chamber of Commerce, Convention and Visitors Bureau, and Tucker County Cultural District Authority. The web-based survey was distributed in May 2016 by Chamber representatives. Fifty-three (53) businesses initiated survey responses in the Qualtrics data collection software platform. Twelve (12) businesses did not complete any parts of the survey resulting in total of 41 usable survey responses. Due to the small sample size, caution should be used when interpreting the results. However, while this sample may be too small to draw statistically valid interpretations, patterns do emerge, especially when coupled with business comments and other data from the planning process.

Survey Results

Respondent Profile

Businesses in the survey population included lodging and retail establishments, real estate offices, outdoor outfitters, restaurants and food-based businesses, and other establishments including visitor services, arts, and business support services (Table 2).

Table 2. Number and Share of Responding Businesses by Type

	Number	Share
TOTAL	41	100%
Lodging (Total)	9	23%
- Hotel/Motel/B&B	5	12%
- Resort/State Park	4	10%
Retail (Total)	4	10%
- Retail/Gift/Specialty	3	7%
- Convenience/Grocery	1	2%
Real Estate (Total)	4	10%
Outdoor Recreation/Outfitter (Total)	3	8%
Restaurant/Café/Tavern (Total)	2	5%
Agritourism/Food Based (Total)	1	3%
Other (Total)	18	43%
- Non-Profit	5	12%
- Business Services	4	10%
- Arts	3	7%

The overwhelming majority of businesses are well established in the community; 70% indicated that they were in business 10 years or more, including 75% of reporting lodging operations, and 67% of retail and outdoor oriented businesses (Table 3). Newly established businesses (three years or less) were recorded in the lodging and business services sectors. In open-ended questions, many identified the natural beauty and sense of community as primary drivers behind their location decision.

Table 3. Age of Business

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	33	8	3	4	3	1	14
Less than one year	0%	0%	0%	0%	0%	0%	0%
1-3 years	6%	13%	0%	0%	0%	0%	7%
4-6 years	15%	0%	33%	50%	0%	0%	14%
7-10 years	9%	13%	0%	0%	33%	0%	7%
More than 10 years	70%	75%	67%	50%	67%	100%	71%

The primary market for Tucker County’s tourism businesses was the state of West Virginia (47%); however, this differed across business categories. For example, lodging and outdoor establishments identified their primary markets as both state and national, while real estate establishments reported an even split between local and national markets. The “other” category, which included arts, non-profits, and some business services also reported an emphasis on local markets.

Table 4. Primary Markets by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	17	5	1	2	2	1	6
Local (Tucker Co.)	18%	0%	0%	50%	0%	0%	33%
Statewide	47%	40%	0%	0%	50%	100%	67%
National	35%	60%	100%	50%	50%	0%	0%
International	0%	0%	0%	0%	0%	0%	0%

When asked about their peak sales months (Figures 1 and 2), businesses identified the summer and early fall months between June-October and winter months of January and February. Conversely, spring months between March and May, and early winter, specifically November and December were identified as off-peak months. In spite of seasonality, the majority of businesses indicated that it did not significantly affect their decisions to remain open or closed throughout the year – of 32 reporting businesses, only four indicated that they were closed for more than two weeks in any given month during the year; most of these were outfitters and businesses engaged in outdoor recreation (Figure 3).

Fig. 1. Peak Season Months,
All Reporting Businesses

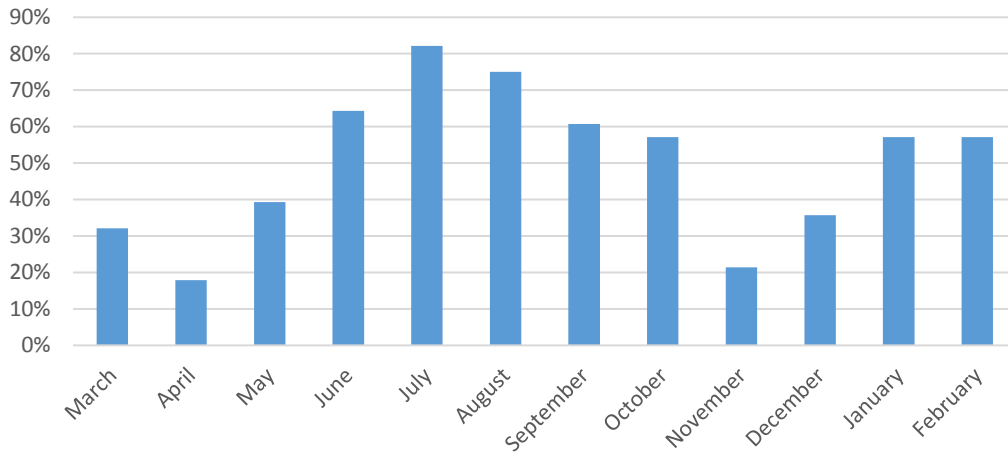
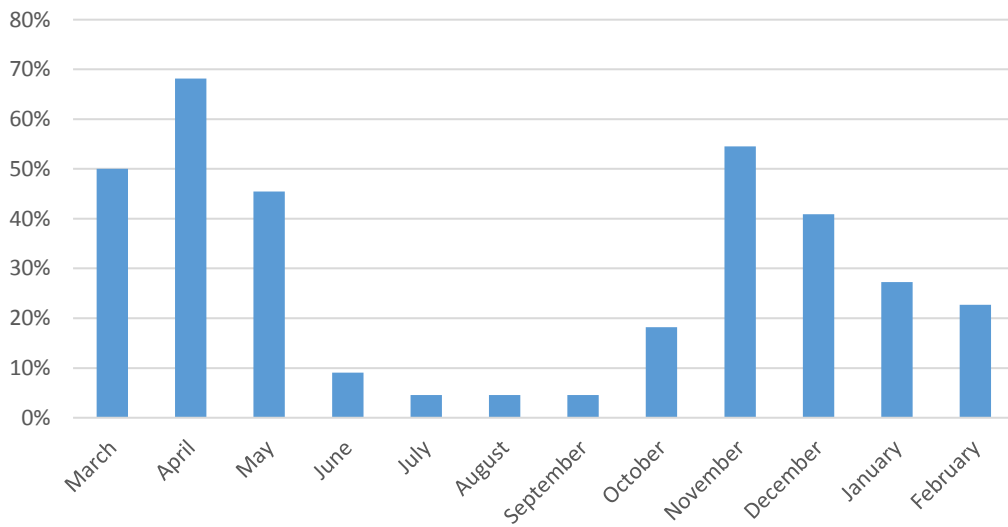


Fig 2. Off-Peak Season Months,
All Reporting Businesses





Fairs and festivals were viewed positively by survey respondents: 94% agreed that they created positive exposure for their business, attracted additional customers (88%), and led to increased sales (73%) (Figure 4). The most popular events (Table 5) included the Leaf Peepers Festival (9 respondents) and ArtSpring (6 respondents). Increasing the promotion, or the number of fairs and festivals could also help buffer tourism's seasonal impacts or extend the tourism season. For Timberline's Snowy Luau may provide an opportunity to draw more visitors in March as visitor numbers begin to decline.

Fig. 4. Business Perceived Value of Fairs & Festivals

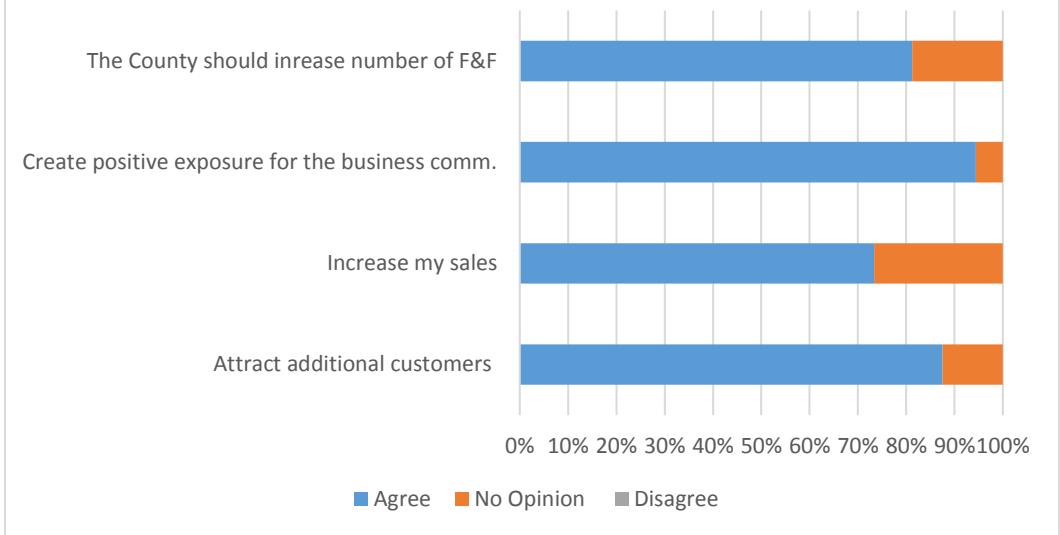


Table 5. Fairs and Festivals Perceived as Having the Greatest Benefit to Tucker County Tourism Based Businesses

Event	Number Reporting
Leaf Peepers	9
ArtSpring	6
Pickin' in Parsons	3
Mountaineer Days	2
Brew Skies Festival	1
County Fair	1
Augusta Heritage Festival	1
Auto Shows	1
Ramp Festival	1
Snowy Luau	1
Military Week	1
Forest Festival	1
Meet the Cheat paddles	1

Employment, Sales, and Earnings

Respondents were asked to provide employment and sales data for their business. However, due to the limited response in an already small sample we used a combination of public and private data sources to generate estimates of employment and wages for the county's tourism businesses. These are described in the tables below:

Table 6. Establishments, Employment, and Wages in Tucker County Tourism Based Businesses

NAICS CODE*	Description	Establishments	Employment	Wages	Wage per Worker
451000	Sporting Goods, Hobby, etc.	3	25	\$365,000	\$14,600
453000	Misc. Store Retailers	3	11	\$106,000	\$9,636
531311	Real Estate Activities	4	26	\$774,000	\$29,769
561500	Travel Arrangements	1	4	\$109,000	\$27,250
713000	Amusement and Rec.	3	11	\$180,000	\$16,364
721000	Accommodations	7	345	\$5,893,000	\$17,081
722000	Food Service and Drinking Est.	18	203	\$2,082,000	\$10,256
813000	Grant making, Civic, Orgs	5	60	\$1,828,000	\$30,467
924120	Admin. of Conservation Programs	4	138	\$3,598,000	\$26,072
	TOTAL	48	823	\$14,935,000	\$18,147

*Selected NAICS sectors follow the methodology used by Dean-Runyan Associates Travel Impacts studies.
 Sources: Workforce West Virginia, Employment and Wages, http://lmi.workforcewv.org/Employment_N_Wages/EnW.html
 Bureau of Labor Statistics, Quarterly Census of Employment and Wages, <http://www.bls.gov/cew/>
 MIG, 2013
 Authors Calculations

The economic contribution of the tourism/recreation industry was calculated based on the data above and a county specific input-output model created in the IMPLAN data and software package.

Tucker County's tourism businesses generate an estimated \$65 million in annual sales (Table 7). These sales directly support 824 jobs in the county and more than \$15 million in employee compensation and proprietors' income. The industry contributes an additional \$19 million in taxes and property income for a combined \$35 million value-added impact.

Table 7. Economic Contribution of Tucker County's Tourism Industry

Impact Type	Employment	Labor Income	Value Added	Output
Direct Effect	824	\$15,260,385	\$34,919,903	\$65,110,616
Indirect Effect	80	\$2,331,301	\$5,019,564	\$9,435,724
Induced Effect	67	\$1,779,585	\$4,063,694	\$6,677,223
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Subsequent rounds of business-to-business spending (indirect effect) and employees' household spending (induced effect) stimulated by sales at tourism businesses generate additional economic impact

in the local economy. The purchase of inputs and additional business-to-business spending supports 80 jobs and \$2.3 million in employee compensation and proprietor’s income. Household spending by local workers supports an additional 67 jobs and \$1.8 million in employee compensation and proprietor’s income. In total, the industry supports 970 local jobs and generates \$44 million in income and taxes, including more than \$19 million in local wages and proprietors’ incomes.

Response from local business owners suggest that tourism is, and will continue to be strong in the coming years. Over the past year, all but one responding business indicated that their sale had remained stable (39%) or increased (56%) (Table 8). Businesses largely anticipate that the county’s tourism industry will continue to grow (74%) or remain stable (16%) going forward (Table 9).

Table 8. Changes to Gross Sales in the Previous Year, by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	18	6	1	1	2	1	7
Increased	56%	50%	100%	0%	0%	100%	71%
Remained the Same	39%	50%	0%	0%	100%	0%	29%
Decreased	6%	0%	0%	100%	0%	0%	0%

Table 9. Anticipated Outlook for Tucker County’s Tourism Industry, by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	19	6	1	2	2	1	7
Growing	74%	100%	100%	0%	50%	100%	71%
Stable	16%	0%	0%	50%	0%	0%	29%
Declining	5%	0%	0%	50%	0%	0%	0%
Not Sure	5%	0%	0%	0%	50%	0%	0%

Half of the responding businesses anticipated their sales to increase in the coming year (Table 10); an additional 28% anticipate at least the same level of business. As a result of the industry’s positive momentum, one quarter (25%) of businesses indicated that they would create new positions or add additional staff; an additional 46% indicated that staffing would remain the same in the next year (Table 11).

Table 10. Anticipated Changes in Gross Sales in the Coming Year, by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	18	6	1	1	2	1	7
Increase	50%	50%	0%	0%	50%	100%	57%
Remain the Same	28%	33%	100%	0%	50%	0%	14%
Decrease	6%	0%	0%	100%	0%	0%	0%
Not Sure	17%	17%	0%	0%	0%	0%	29%

Table 11. Anticipated Changes in Employment in the Coming Year, by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	24	6	2	3	2	1	10
Creating new positions / adding staff	25%	17%	0%	67%	0%	100%	20%
No change	46%	33%	50%	33%	50%	0%	60%
Eliminating positions / reducing staff	4%	17%	0%	0%	0%	0%	0%
Not sure	25%	33%	50%	0%	50%	0%	20%

Business Costs

In addition to sales and anticipated growth, businesses were asked about their primary expenses. Only 35% of responding businesses indicated that they provided benefits (Table 12). Of, these 88% provided group insurance. Although this represented only 30% of all responding businesses, it was consistently identified as a primary expense (Table 13). Other leading expenses included labor costs, building costs, and taxes.

Table 12. Employee Benefits by Business Type

	TOTAL	Lodging	Retail	Real Estate	Outdoor	Restaurant	Other
Total Responding	23	6	2	3	2	1	10
No Benefits	65%	83%	100%	33%	50%	100%	60%
Benefits Offered	35%	17%	0%	67%	50%	0%	40%
- Group Insurance	88%	17%	0%	67%	50%	0%	30%
- Retirement	38%	17%	0%	0%	0%	0%	20%
- Paid Leave	63%	17%	0%	0%	50%	0%	30%
- Other	25%	0%	0%	0%	0%	0%	20%
- No Response	13%	0%	0%	0%	0%	0%	10%

Table 13. Highest Expenses for Tucker County Tourism Based Businesses, by Business Type

	TOTAL
Total Responding	19
Insurance	72%
Labor	61%
Building costs (utilities, rent, maintenance, etc.)	50%
Taxes	44%
Supplies/Inventory	39%
Advertising/Marketing	33%
Business Support Services	6%

Recommendations

Based on the above data, several recommendations are suggested. Enacting many of these recommendations may be best accomplished through partnerships with other state, county, and local businesses, agencies, and organizations.

As one business owner noted, “people need to realize that tourism is our ‘industry’.” This sentiment is also supported by “hard data” which show sizeable share of county employment provided by the industry. ***County leaders should continue to engage a breadth of participants from public, private, and non-profit sectors in formal planning efforts*** that support and continue the development of artistic, cultural, and recreational tourism attractions in the county. Planning is of increasing importance with the completion of Corridor H which will undoubtedly bring both new visitors and new challenges. While visitors and increased business activity should be welcomed to the area, the community must take the steps necessary to guide and protect the public lands, open spaces, local culture, and other assets that have made the county a desirable place to visit and locate a tourism based business.

For planning to be effective it will have to address the wants and needs of constituents across the county. As several respondents noted in open ended questions, the divide between Parsons and the mountain communities is real. Finding ways to show value and ***engage a diversity of communities and community members from across the county*** will be important moving forward. Documents like this that quantify the economic contribution of tourism activities may be useful for internal marketing and promotion. Planning efforts should encourage opportunities to promote and leverage assets like the river, rail trail, and off-mountain festivals like Pickin’ in Parsons to showcase this area of the county and engage residents in and with tourism activities.

Tourism leaders and local businesses should also explore opportunities for partnerships and collaborations with neighboring counties and within the larger region. This could include partnerships with regional entities like the Mountain Music Trail, or working to market activities before or after specific events like the Blues, Brews, and BBQ Festival in Pocahontas County. Special attention should be given to events that might be leveraged to increase off-season visitation to Tucker County.

Local tourism leaders should ***continue to engage with tourism based businesses to ensure their needs are being met***. This might include formal or informal business retention and expansion programs to better assess business needs, entrepreneurship resource and training programs for new and existing businesses, a business reference guide identifying local technical resources, the creation of a buy-local program for business-to-business purchases, etc. Given the stigma attached to tourism jobs (low-wages, no benefits) and the high insurance costs for businesses that do provide benefits it could be beneficial to explore opportunities for insurance pools that could lower insurance costs for local businesses and extend benefits to more workers employed in the industry.

Appendix A. Open Ended Response Questions

(Q3) What attracted you to invest / locate your business in Tucker County?

- A more simple way of life.
- The flood of 1985.
- Beauty and energy of the area; affordable space
- Ski Resort owners
- Lifelong residents; tourist traffic
- Mountains, parks, scenic
- I had to bring my own herbs, spices, lotions from the city when I would visit! I saw that people had no where to shop (and I was working full-time back home at the time)
- Local community members saw a need and met that need with the opening of a long term care facility.
- Area parks
- Saw the potential for another vacation rental and real estate sales office that offered friendly, courteous service.
- I was a resident in need of job
- We moved here because of its natural beauty and many outdoor recreational activities
- Business opportunity, corridor H
- Tucker County has always been a special spot. Beautifully located in the mountains.
- Canaan valley and Timberline ski areas
- People, climate, low cost of living
- Lived in Tucker County and seeking contracts to work as self-employed provided income
- We live here and love it
- Better service to our customers
- Our mission is geographically grounded in Tucker Co.
- It is the most beautiful place on the planet. The timing was right for us to choose this location and we liked the communities surrounding us.
- Business was already established
- Central to wife's consulting business
- Family and scenery

(Q.22) Any comments related to the economic/business environment of your community, and/or the current and future impacts of tourism in Tucker County?

We seem to be getting more casual visitors, who are not necessarily avid outdoor enthusiasts. We are getting more drive through business and more people who are simply sightseeing. They require more entertainment and more amenities. They need more guidance about where to go and what is allowed. Our seasonality and harsh weather will always be an issue to them. The seasonal nature of our business is a challenge. Unless you are well capitalized, it can be difficult to get established and achieve positive cash flow.

Completion of Corridor H will impact tourism in Tucker County.

It's time, people need to realize that tourism is our "industry". We need to be ready to face what the highway will do for our area. We need to protect the charm our Mountain has but welcome the increased traffic and welcome our guests with open arms.

If Timberline Resort could be under new ownership Canaan Valley tourism would boom.

Though my business is not dependent on tourism, I feel that tourism is and will be growing. It is vital to guide and regulate that; to develop and market opportunities based on the county's strengths which are our public lands, open space, absence of "bright lights, box stores, and commercialism"; and to guard against anymore consumptive resource endeavors; protect our lands and our waters.

Zoning and signage codes especially from HOA standpoints need to be more lax. The signage in Tucker County is miserable.

Tourism continues to drive the economy of Tucker County. Careful planning and use of assets are critical to bringing in new opportunities. The completion of Corridor H is also critical to bringing in new people to visit the county. When they come, hopefully they will bring their disposable income to spend in Tucker County.

As a business person in Tucker County, it would be nice to have some sort of reference guide as to what we have available to us for resources. I would also, very much, like to see the entire county have an increase in tourism. The obvious spots in the county are Thomas/Davis and Canaan Valley, but the lower altitude areas of the county, like Parsons, have a lot to offer. I just don't think they know how to truly utilize what they have. There is almost nowhere for tourists to stay in that area and that becomes the biggest hurdle. So many jobs could be created on that end of the county just by promoting the beauty and giving a place for visitors to stay.

While the smaller events, festivals and the county fair could draw more tourists, they are advertised badly and not very welcoming. I was a new resident once and I had a feeling not all tourists are wanted. When I say I live down the mountain and suggest there is talent there, I "hear" the old working class snub.

The divide between upper and lower elevation is a real problem. Whenever one is slighted, it lives on! Every effort to build the relationships should be taken.

I think we need public transportation between the areas or at least better communication between the two main areas.

Every tourist is different and we could please more if we could get them to the things or experiences they are seeking.

Appendix B: Tucker County Business Survey

Many of Tucker County's businesses attribute a significant share of their profit and income to tourism related activities. Here is your opportunity to help the industry. Please take time out of your busy schedule to complete this survey. Your participation is voluntary and you have the right to refrain from answering any questions. However, your participation will help us compile important statistical information for use in supporting industry efforts in the county.

If you choose to participate, your answers will be kept confidential. Your individual responses will not be given to any other group, business, or taxing authority. Data will reflect the TOTAL contribution of the tourism INDUSTRY, not individual establishments. The survey itself will have no names or addresses associated with it, and all completed questionnaires will be securely stored.

Thank you for your help in this important study. If you have any questions please do not hesitate to contact:

Daniel Eades, Extension Specialist West Virginia University Extension Service
Daniel.Eades@mail.wvu.edu Office: 304-293-8697

or

Doug Arbogast, Extension Specialist West Virginia University Extension Service
Douglas.Arbogast@mail.wvu.edu Office: 304-293-8686

Q1 Which category best describes your business?

- Agritourism/Food based business (1)
- Campground (2)
- Convenience/grocery store (3)
- Hotel/Motel/B&B (4)
- Non-Profit (please specify sector of focus) (5)
- Outdoor equipment rental/sales (6)
- Outdoor recreation/outfitter (7)
- Pharmacy/drug store (8)
- Real Estate (9)
- Resort/State Park (14)
- Restaurant/tavern/café (10)
- Retail/gift/specialty store (11)
- Transportation/shuttle service (12)
- Other (please describe) (13) _____

Answer If Which category best describes your business? Non-Profit (please specify sector of focus) Is Selected

Q1.1 Type of non-profit

- Arts (1)
- Culture (2)
- Environment (3)
- History (4)
- Other (5) _____

Q2 How many years has your business been in operation?

- Less than one year (1)
- 1 - 3 years (2)
- 4 - 6 years (3)
- 7 - 10 years (4)
- More than 10 years (5)

Q3 What attracted you to invest / locate your business in Tucker County?

Q4 Is your partner/spouse employed in Tucker County?

- Yes (1)
- No (2)

Q5 Peak season month(s) (check all that apply)

- Jan (1)
- Feb (2)
- March (3)
- April (4)
- May (5)
- June (6)
- July (7)
- Aug (8)
- Sept (9)
- Oct (10)
- Nov (11)
- Dec (12)

Q6 Off-Peak season month(s) (check all that apply)

- Jan (1)
- Feb (2)
- March (3)
- April (4)
- May (5)
- June (6)
- July (7)
- Aug (8)
- Sept (9)
- Oct (10)
- Nov (11)
- Dec (12)

Q7 Is your business closed for more than 2 weeks in any given month during the year?

- Yes (1)
- No (2)

Answer If Is your business closed for more than 2 weeks in any given month during the year? Yes Is Selected

Q7.1 Which month(s) is your business closed? (check all that apply)

- Jan (1)
- Feb (2)
- March (3)
- April (4)
- May (5)
- June (6)
- July (7)
- Aug (8)
- Sept (9)
- Oct (10)
- Nov (11)
- Dec (12)

Q8 Do you have any employees?

- Yes (1)
- No (2)

Answer If Do you have any employees? Yes Is Selected

Q8.1 How many people do you employ in Tucker County during...

	Full Time (1)	Part Time (2)
Peak season (1)		
Off-Peak season (2)		

Answer If Do you have any employees? Yes Is Selected

Q8.2 On average, how many hours per week does the typical employee work during...

	Full Time (1)	Part Time (2)
Peak season (1)		
Off-Peak season (2)		

Q9 In the next year, do you anticipate...

- Creating new positions / adding staff (1)
- Eliminating positions / reducing staff (2)
- No change (3)
- Not sure (4)

Q10 How much did you pay in wages and salaries last year?

Q11 Do you offer benefits?

- Yes (1)
- No (2)

Answer If Do you offer benefits? Yes Is Selected

Q11.1 What benefits do you offer (check all that apply)

- Group Insurance (health, dental, life, etc.) (1)
- Retirement (2)
- Sick Leave / Paid Time Off (3)
- Profit Sharing (4)
- Other (please describe) (5) _____

Q12 Approximately what were the gross revenue figures for this business location in the past year?

Q13 In the past year, have your business's sales...

- Increased (1)
- Decreased (2)
- Remained the same (3)
- Not sure (4)

Q14 What do you anticipate your business's sales to do in the next year...

- Increased (1)
- Decreased (2)
- Remained the same (3)
- Not sure (4)

Q15 What percentage of sales would you estimate can be largely attributable to tourism related spending?

Q16 Where is your primary market?

- Local (Tucker County) (1)
- Statewide (2)
- National (3)
- International (4)

Q17 Please indicate the value of the festivals/events held within Tucker County

	Agree (1)	No Opinion (2)	Disagree (3)
Bring additional customers to my business (1)	-	-	-
Increase my business sales (2)	-	-	-
Create positive exposure for the business community (3)	-	-	-
The County should increase the number of festivals/events (4)	-	-	-

Q18 Which festivals/events benefit your business the most?

Q19 What are the four highest expenses for your businesses?

- Advertising/Marketing (1)
- Building costs (utilities, rent, maintenance, etc.) (2)
- Business support services (accounting, legal, payroll, etc.) (3)
- Insurance (4)
- Labor (5)
- Permits (6)
- Supplies/Inventory (7)
- Taxes (8)
- Transportation costs (9)
- Training/Professional development (10)
- Other (please describe) (11) _____
- Other (please describe) (12) _____
- Other (please describe) (13) _____
- Other (please describe) (14) _____

Q20 During the next year do you plan on...

- Remaining in the same location (1)
- Expanding your location(s) (2)
- Downsizing your location(s) (3)
- Relocating your business (4)
- Selling your business (5)
- Closing (6)

Q21 What is your outlook for Tucker County's tourism industry?

- Growing (1)
- Declining (2)
- Stable (3)
- Not Sure (4)

Q22 Any comments related to the economic/business environment of your community, and/or the current and future impacts of tourism in Tucker County?