



The Economic and Fiscal Impact of the Hatfield-McCoy Trail System in West Virginia - 2019

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Center for Business and Economic Research

Marshall University

One John Marshall Drive
Huntington, WV 25755
(304) 696-5747
cber@marshall.edu

The Economic and Fiscal Impact of the Hatfield-McCoy Trail System in West Virginia 2019

Justin Matthews

Senior Research Associate

Kent Sowards

Senior Policy Advisor

Research assistance by:

Jim Atkinson

Prepared for:

Hatfield-McCoy Regional Recreation Authority

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Executive Summary

The Hatfield-McCoy Trails project, governed by the Hatfield-McCoy Regional Recreation Authority a joint development agency, is a network of outdoor recreational trails and amenities serving fourteen historically economically distressed counties in southern West Virginia. Originally established to promote statewide and regional economic development opportunities related to tourism, the network opened in 2000 with three trail systems and nearly 300 miles of cleared trails. Today, the Hatfield-McCoy Trails have expanded to include a total of eight trail systems totaling more than 700 miles of trails usable by All Terrain Vehicles (ATVs), Utility Terrain Vehicles (UTVs), Off-Road Vehicles (ORV's) and off-road motorcycles.

Estimated Economic Impact

The extensive network of trails draws thousands of visitors into the project area each year. Non-local visitor spending, coupled with annual expenditures to maintain the function and operation of the Hatfield-McCoy Trails, stimulates the local economy and the State of West Virginia by extension. Quantifying the value of the input lays a crucial foundation in better understanding the economic and fiscal benefits of the presence of the Hatfield-McCoy Trails in West Virginia. **Table 1** summarizes the estimated economic impact of the Hatfield-McCoy Trails for 2019.

Table 1. Hatfield–McCoy Trails Economic Impact Summary, 2019

	Direct Impact	Total Impact
Hatfield-McCoy Operating Expenses	\$4,348,900	\$8,862,823
Non-Local Visitor Spending	\$18,730,347	\$29,186,755
Combined Expenditures	\$23,079,247	\$38,049,478

This analysis indicates that the nearly \$4.3 million in spending conducted by the Hatfield-McCoy Trails generated an **additional \$4.6 million in economic activity** within the State, for **a total operational impact of \$8.9 million**. Even more notably, the Hatfield-McCoy Trails bring non-local visitors to the area whose spending is estimated to generate an additional \$29.1 million in economic activity in West Virginia. **Combined, the total estimated economic impact of the Hatfield-McCoy Trails is more than \$38 million.**

In addition to the dollar value of economic activity, the Hatfield-McCoy Trails supports employment and thus provides household earnings. The Hatfield-McCoy Trails directly sustain 24 full-time equivalent (FTE) jobs year-to-year and can be credited with **supporting a total of approximately 430 FTE positions across the State.**

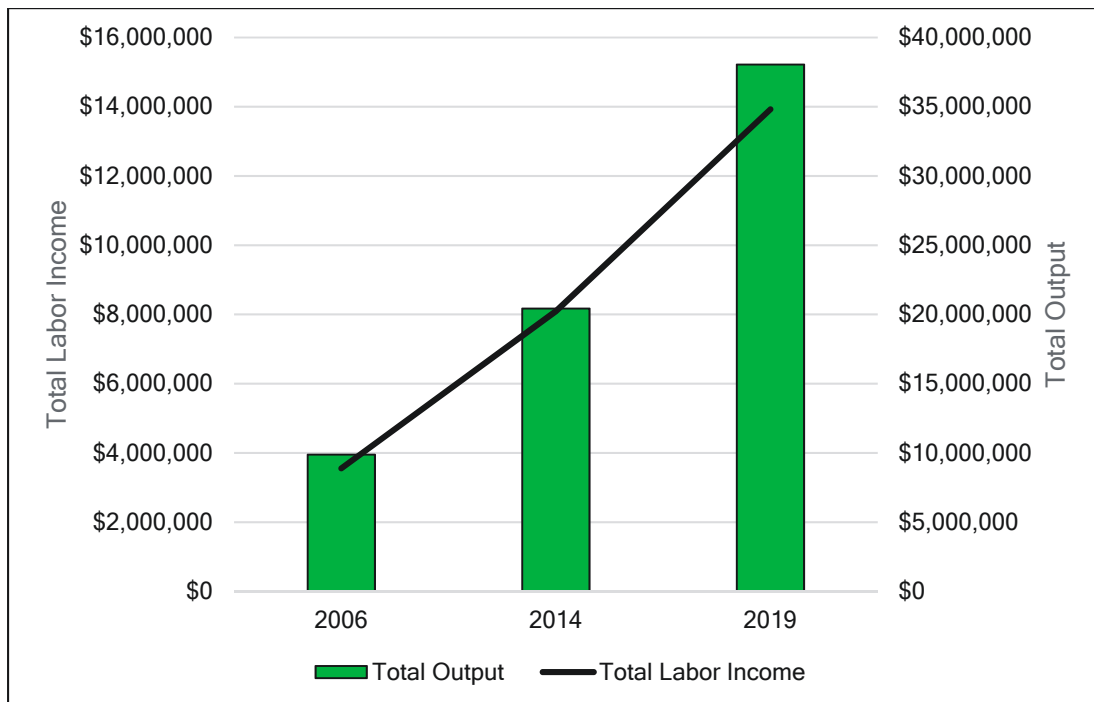
This economic activity generated by Hatfield-McCoy Trails' operations and visitor spending also yields significant tax revenues. Direct employment related to the Hatfield-McCoy Trails improves the state and local tax base by roughly \$173,000 annually. When considering the estimated total employment sustained by the presence of the Hatfield-McCoy Trails, an annual state and local tax benefit of more than \$450,000 is estimated. **An additional fiscal benefit to the State of more than \$1.3 million is estimated as a result of non-local visitor spending while visiting the Hatfield-McCoy Trails.**

Changes from prior estimates

In 2006 and 2014, CBER conducted economic impact analyses of the Hatfield-McCoy Trails network on the State of West Virginia. Estimates of FTE employment and inflation-adjusted labor income and total output from prior economic impact studies undertaken by CBER indicate substantial growth in the economic impact of the Hatfield-McCoy Trails. **Figure 1** illustrates the trend in labor income and total output.

- **Total estimated impacts of total employment have risen from 146 FTE in 2006 to 236 in 2014 to 430 in 2019.**
- **Inflation-adjusted total labor income was roughly \$3.5 million in 2006, rising to \$8.1 million in 2014 and to \$13.9 million in 2019.**
- **Total inflation-adjusted estimated impacts of output have risen from \$9.8 million in 2006 to \$20.4 million in 2014 to \$38.0 million in 2019.**

Figure 1. Economic Impact Change Since 2006



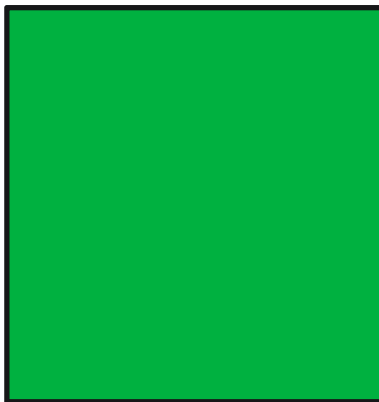
Visitor survey

Surveys were distributed to visitors during the Trailfest event that occurred on October 10-14, 2019 as well as the general email contact database with 2,847 valid responses collected.

- More than 72 percent of survey respondents indicated that they last visited the trail system in 2019 and nearly 94 percent had visited within the last two years.
- Nearly 60 percent of respondents indicated that they typically spent “Two or three” days riding the Hatfield-McCoy Trails.
- An overwhelming majority of respondents to the survey (nearly 91 percent) indicated that they were from states other than West Virginia, roughly corresponds to the number of resident versus non-resident permit sales for 2019.
- On average, non-local respondents report spending nearly \$530 more during a typical visit than their local counterparts.

Tens of thousands of visitors to the state not only bring tourism dollars, delivering jobs, wages and tax impacts to the region, but also provide an opportunity to enhance the image of the state and its scenic terrain. Further, the Hatfield-McCoy Trails also provide benefits to landowners through public-private partnerships and access to shared services such as insurance, professional management services and law enforcement.

The continued development and enhancement of the Hatfield-McCoy Trail system and related amenities stimulates further improvements for a rugged, rustic and rural region eager for economic drivers and success stories. The Hatfield-McCoy Trail system provides an excellent template for that type of endeavor.



Introduction

Harnessing the rugged and scenic terrain of Southern West Virginia, the Hatfield-McCoy Trail system attracts more than 56,000 off-road trail riders into the area each year. The Hatfield-McCoy Trails first opened in October 2000 with three trail systems in one of the most economically distressed areas of the State. Since that time, the Hatfield-McCoy Trails have expanded to include eight trail systems across Southern West Virginia that currently boast more than 700 miles of off-highway vehicle trails.

The Hatfield-McCoy Trails have provided the region with increased opportunities for employment and entrepreneurship across the Southern and Central portion of the state, as well as an increase in tourism venues and attention for hosting one of the largest off-highway vehicle trail systems in the world. The success of the Hatfield-McCoy Trails has been documented in several off-road publications and television programs. For nearly two decades, the Hatfield-McCoy trail system has hosted the National TrailFest, a premier off-road event for Side by Side, ATV, and dirt bike enthusiasts in Gilbert, WV.

The Hatfield-McCoy Regional Recreation Authority (HMRRA), the organization that oversees the Hatfield-McCoy Trails, contracted with the Marshall University Center for Business and Economic Research (CBER) to examine economic and fiscal benefits in detail. This report seeks to quantify the economic impacts of the presence of the Hatfield-McCoy Trails—its annual expenditures and those of its visitors to the area—while also considering the non-quantified benefits that may be attributed to the Trail System’s presence and success. Comparisons will be drawn to the prior reports (also completed by CBER) in 2006 and 2014.

About the Hatfield-McCoy Trail System

Background and Development

The concept of an economic development project for distressed Southern West Virginia has its origins in the early 1990s, influenced by the desire to promote tourism development potential in the region. Entities including the Hatfield-McCoy Recreation Development Coalition and the U.S. Army Corps of Engineers conducted surveys of community leaders as well as feasibility and economic impact studies of proposed projects to examine the viability of development options.

In 1996, seeking an opportunity to support trail-oriented recreation facilities utilizing private property in the mountainous terrain of southern West Virginia to provide significant economic and recreational benefits to the state by increased tourism, the Hatfield-McCoy Regional Recreation Authority (HMRRA) was established by the West Virginia Legislature to oversee the continual development of the Hatfield-McCoy Trails economic development project.¹

The initial plan included seven counties—Boone, Lincoln, Logan, McDowell, Mingo, Wayne and Wyoming—and was later revised to include Kanawha and Mercer counties. In 2018, this was expanded further to include Braxton, Clay, Fayette, Nicholas and Webster counties.² Development of the first three trails concluded in 2000 and the Hatfield-McCoy Trails officially opened in October of that year with roughly 300 miles of trails.

Governance

Management and governance of the Hatfield-McCoy Trails is the responsibility of the Hatfield-McCoy Regional Recreation Authority (HMRRA). The HMRRA is a public corporation established by the West Virginia Legislature first as a statutory corporation and converted to a joint development entity for the purpose of enabling and facilitating the development and operation of a system of trail-oriented recreation facilities for use by off-highway motor vehicle enthusiasts.

The HMRRA's governing board made up of members (not to exceed an amount twice the number of participating counties), representative of the various interests involved in the Hatfield-McCoy Recreation Area project in the participating counties. This includes county commission member appointees with expertise in travel and tourism, licensed land-surveyor or engineers associated with a mining, logging, natural gas, or other resource-extraction industry and individuals representing or associated with a corporation or individual landowner whose land is being used or is expected to be used in the future as part of the Hatfield-McCoy Recreation Area project.³

The HMRRA is responsible for both enabling and facilitating the development and operation of the Hatfield-McCoy Trails network.⁴ The Board is responsible for agreements with landowners - both corporations and individuals - to secure land for trail development. By legislation, landowners are protected from liability on lands used for the Hatfield-McCoy Trails network.⁵ Much of the continuing success of developing trails on land owned by corporations and individuals can be attributed to the public-private partnership established between HMRRA and other entities.

¹ West Virginia Code §20-14, et seq.

² West Virginia Code §20-14-3(a),

³ West Virginia Code §20-14-3(b), et seq.

⁴ West Virginia Code §20-14-3.

⁵ West Virginia Code §20-14-9.

Current Trail Systems

The current Hatfield-McCoy Trails network includes more than 700 miles of trails distributed over eight trail systems. Each system provides riders with an exciting and safe off-road adventure highlighting Southern West Virginia. Most trails can accommodate all-terrain vehicles (ATVs), utility terrain vehicles (UTVs or side-by-sides) and off-road motorcycles. The Bearwallow System also accommodates other vehicle types, including off-road vehicles (ORVs), which are prohibited on all other Hatfield-McCoy Trail systems. The Hatfield-McCoy Trails network currently operates 365 days a year from daylight to dark. Open trail systems are graded by difficulty. Trail difficulty increases in the following order:

- Easiest (green trails)
- More difficult (blue trails)
- Most difficult (black trails)
- Most difficult with vehicle restrictions (red/black trails)
- Single track (orange trails).

HMRRA determines the proportion of trail difficulty levels by trail system. These proportions represent an estimate of the number of trails in each trail system by trail difficulty rating. Warrior Trail System offers the largest proportion of green trails (52 percent) while Devil Anse offers the largest proportion of blue trails (53 percent). Bearwallow and Buffalo Mountain offers the largest proportion of both black trails (31 percent) while Pinnacle Creek offers the highest percentage of red/black trails (10 percent). Buffalo Mountain provides the largest proportion of single track only trails (16 percent) in the Hatfield-McCoy Trails network. An overview of each trail system is provided in Appendix A.

Plans for Future Development

The HMRRA updates its Five-Year Trail Development Plan each year as part of its commitment to the continual enhancement of the Hatfield-McCoy Trails and the economic conditions of the region. The Plan details statistics of current trail systems; provides updates for planned trail systems and those currently in progress; notes the status of ancillary plans; and reviews the HMRRA's current and future staffing needed to manage the Hatfield-McCoy Trail system. The most recent plan for years 2020 to 2024 outlines the status of several projects, including the construction of several large sections of trail and accompanying trailhead facilities and developing supporting infrastructure to promote additional investment.

Data Sources and Methodology

Data collected to analyze the impact of the Hatfield-McCoy Trails network on the state of West Virginia include financial statements and employment figures supplied by HMRRA and spending patterns modeled from a visitor's survey distributed to the Hatfield-McCoy email contact list. Other supplementary information is presented as appropriate to assist in describing the economic and demographic base of both the state and the region.

Study Area and Geography

The state of West Virginia serves as the study area for the purpose of constructing the economic impact model in IMPLAN[®].⁶ However, as the focus of the Hatfield-McCoy Trails project is fourteen southern West Virginia counties (five of which currently have a Trails presence), this study analyzes the specific demographic and economic characteristics of the Trails' region as well.

Regional analysis for Hatfield-McCoy Trails counties is for the counties participating in the Hatfield-McCoy Trails project area are outlined in State Code as:

- Boone
- Braxton
- Clay
- Fayette
- Kanawha
- Lincoln
- Logan
- McDowell
- Mercer
- Mingo
- Nicholas
- Wayne
- Webster
- Wyoming

Demographic and Economic Data

This report uses demographic and economic data releases as available from a number of federal sources, including the U.S. Census Bureau, the U.S. Bureau of Economic Analysis (BEA), and the U.S. Bureau of Labor Statistics (BLS). Most demographic and economic characteristics reviewed in this report are represented with trend analysis when possible.

Economic Impact

CBER uses the IMPLAN[®] regional economic impact software, also known as an input-output (I-O) model, to analyze the impact of the Hatfield-McCoy Trails network on the State of West Virginia. The software analyzes the relationship between industries and socioeconomic characteristics of the local economy, resulting in an estimation of income, output and employment, as well as direct, indirect and induced effects of spending. The model used for this analysis is based on data for the year 2019.

⁶ IMPLAN[®] stands for IMPact analysis for PLANning. For more information, please visit the MIG IMPLAN website at <http://implan.com/v4/index.php>.

Fiscal Analysis

The fiscal benefit of the Hatfield-McCoy Trails' presence is considered in two ways. The first, state and local tax impact, is calculated using a tax model developed by CBER. Data used for this calculation are based on estimates for FY 2019 as produced by the West Virginia State Tax Department and represent a portion of total State taxes based on direct and total employment related to the presence of the Hatfield-McCoy Trails. The model considers business, consumer sales and use, personal, excise and other taxes and fees with respect to total FTE employment sustained in the State and by the Hatfield-McCoy Trails directly and is not intended to represent a full fiscal impact of the trail system on state and local economies.

The second benefit is considered with respect to non-local visitor spending. Non-local visitors provide fiscal benefit to West Virginia and regional economies through increased sales taxes. When these visitors purchase fuel, prepared food, souvenirs and other goods and services within the State as a result of their visit to the Hatfield-McCoy Trails network, sales taxes are collected that would likely not have been realized otherwise. This tax is approximated based on sales tax rates for each expenditure category in the visitor survey and the estimated expenses attributed to non-local visitors.

Data Collection

Operating Budget and Expenditures

The HMRRA provided annual financial statements for 2017 and 2018 as well as budgeted figures for 2019. The HMRRA supplied payroll figures and hourly rate estimates, which were used to calculate the full-time equivalence (FTE) for an annual employment figure. To calculate FTEs, part-time individuals must be translated to full-time equivalent positions.

Visitor Survey

Data collected in the Hatfield-McCoy Trails visitor survey include respondent perceptions of various aspects of the different trail systems, experiences while visiting any of the Trails locations and estimates of expenditures in various spending categories. Survey responses form the basis of estimated total spending by all trail system visitors. Expenditures for all non-local visitors are estimated using a weighted average of survey respondents.⁷ Weighted spending for local visitors is also calculated for comparison. ZIP code, state and/or country of residence provided by respondents are used to classify each response with a local or non-local designation.⁸

⁷ Spending habits of non-local respondents only are used in the IMPLAN[®] modeling software, as monies spent by individuals who live in the area currently would likely still be spent in the area and would overestimate the indirect and induced spending attributable to trails system activity.

⁸ For the purpose of this analysis, local visitors are residents of the State of West Virginia; non-local visitors reside elsewhere.

Regional Demographic and Economic Characteristics

The region served by the Hatfield-McCoy Trails is rugged, rustic and largely rural. To help demonstrate the characteristics of the region, data related to population, income, labor force and unemployment is presented below. The Hatfield-McCoy Trails counties are compared to state-level West Virginia data as well as counties making up the balance of the state.

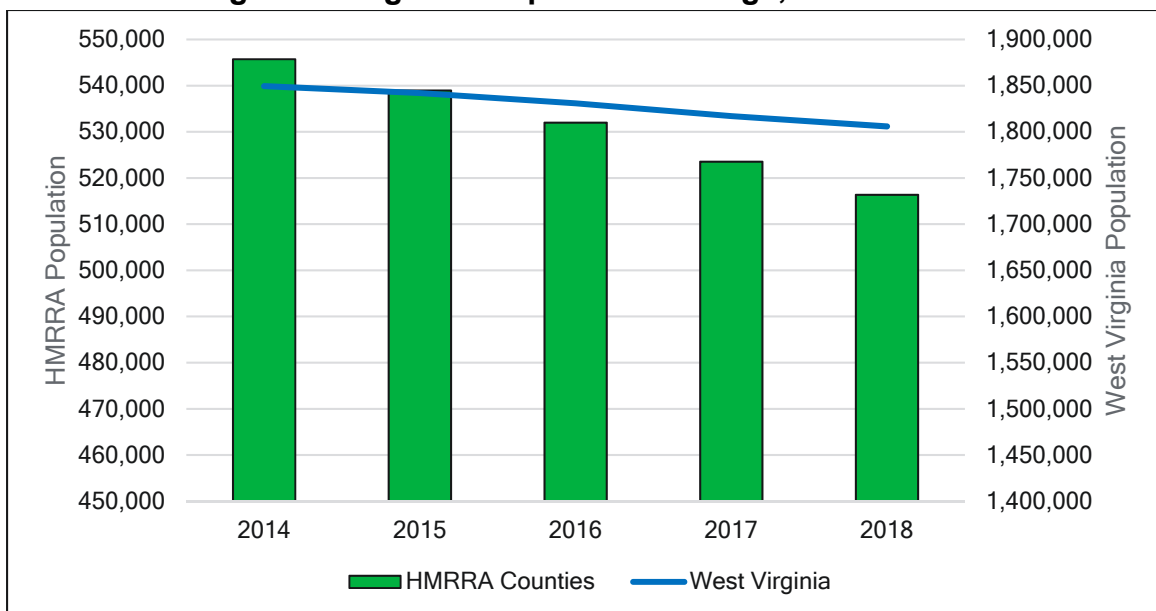
The estimated total population in Hatfield-McCoy Trail system counties declined by more than five percent from 2014 to 2018 (see **Table 2** and **Figure 2**). This decline outpaced those for both West Virginia and the counties making up the balance of the state (-2.4 percent and -1.1 percent respectively). Roughly two-thirds of total population losses from 2014 to 2018 came from Hatfield-McCoy Trail system counties.

Table 2. Regional Population Change, 2014 – 2018

Year	HMRRA Counties	Balance of State	West Virginia
2014	545,718	1,303,749	1,849,467
2015	538,945	1,303,051	1,841,996
2016	531,996	1,298,933	1,830,929
2017	523,517	1,293,531	1,817,048
2018	516,346	1,289,486	1,805,832
Change	-29,372	-14,263	-43,635
% Change	-5.4%	-1.1%	-2.4%
Annual % Change	-1.3%	-0.3%	-0.6%

Source: U.S. Bureau of Economic Analysis, Regional Economic Information System (REIS)

Figure 2. Regional Population Change, 2014 – 2018



Source: U.S. Bureau of Economic Analysis, Regional Economic Information System (REIS)

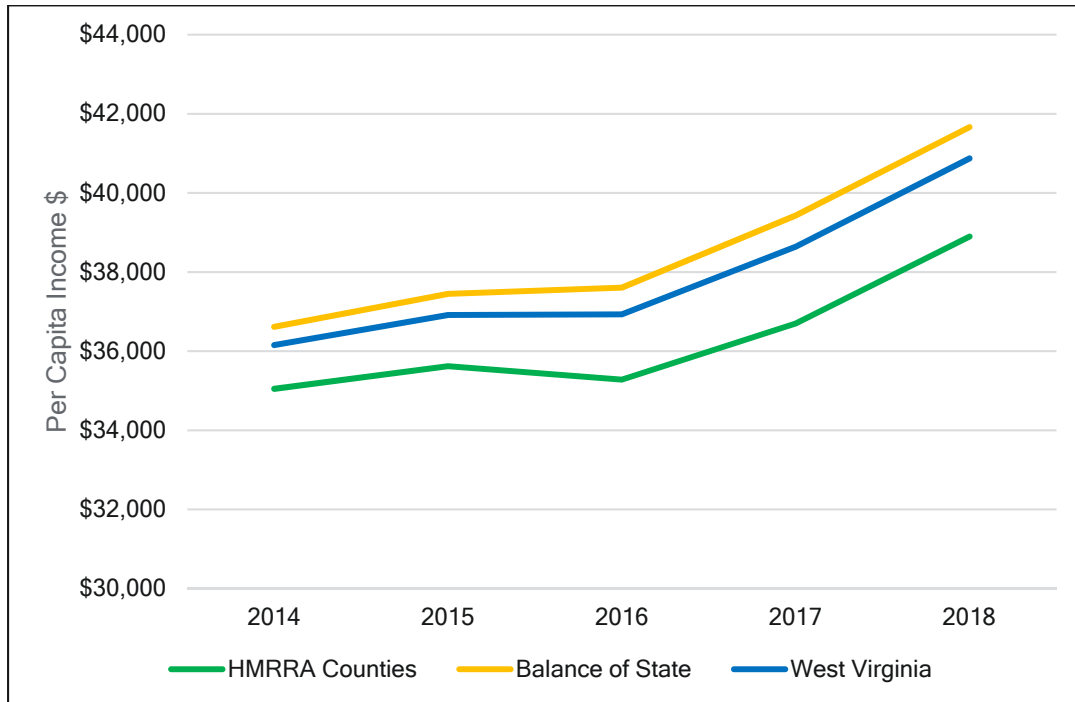
Per capita income for the Hatfield-McCoy counties lags those figures for the state and remaining counties. Making no adjustment for inflation, increases were observed for all geographies over the 2014 to 2018 time period. **Table 3** and **Figure 3** provide additional detail.

Table 3. Regional Per Capita Income, 2010 – 2018

Year	HMRRA Counties	Balance of State	West Virginia
2014	\$35,049	\$36,615	\$36,153
2015	\$35,620	\$37,451	\$36,915
2016	\$35,283	\$37,606	\$36,931
2017	\$36,701	\$39,431	\$38,644
2018	\$38,897	\$41,663	\$40,873

Source: U.S. Bureau of Economic Analysis, Regional Economic Information System (REIS)

Figure 3. Regional Per Capita Income, 2010 – 2018



Source: U.S. Bureau of Economic Analysis, Regional Economic Information System (REIS)

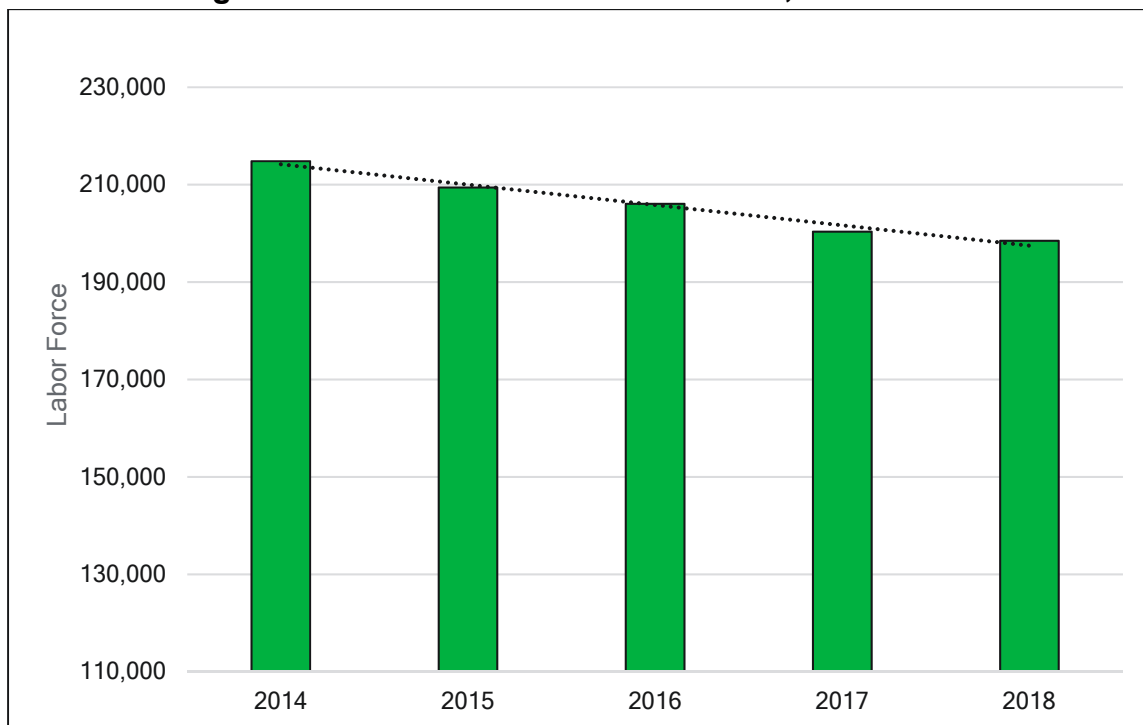
Estimates of the available labor force indicate declines in the Hatfield-McCoy project counties and the state from 2014 to 2018. The decline in Hatfield-McCoy counties (-7.6 percent) exceeds those for the state (-0.5 percent), while the remaining counties posted a 1.9 percent increase over the same period. The WV estimated labor force rebounded slightly from 2017 to 2018 while the Hatfield-McCoy counties continued to post a decline. Please see **Table 4** and **Figure 4** for more detail.

Table 4. Regional Labor Force, 2014 – 2018

Year	HMRRA Counties	Balance of State	West Virginia
2014	214,826	573,995	788,821
2015	209,419	572,484	781,903
2016	206,073	576,835	782,908
2017	200,357	579,234	779,591
2018	198,483	584,861	783,344
Change	-16,343	10,866	-5,477
% Change	-7.6%	1.9%	-0.7%
Annual % Change	-1.9%	0.5%	-0.2%

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics Series.

Figure 4. HMRRA Counties Labor Force, 2014 – 2018



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics Series.

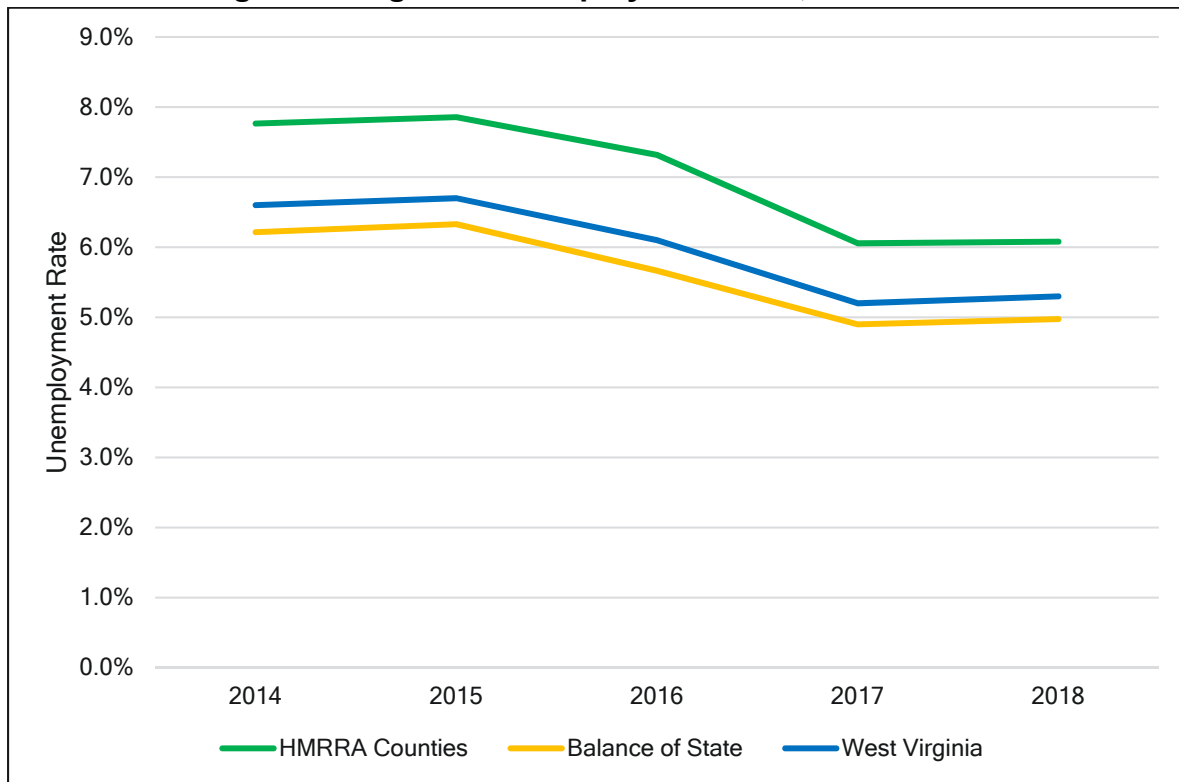
Estimates of the unemployment rate declined in all regions from 2014 to 2018 over the study period with trends roughly mirroring each other. Unemployment rates for the Hatfield-McCoy counties remain higher than their counterparts. **Table 5** and **Figure 5** illustrate the change in unemployment rate.

Table 5. Regional Unemployment Rate, 2014 – 2018

Year	HMRRA Counties	Balance of State	West Virginia
2014	7.8%	6.2%	6.6%
2015	7.9%	6.3%	6.7%
2016	7.3%	5.7%	6.1%
2017	6.1%	4.9%	5.2%
2018	6.1%	5.0%	5.3%

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics Series.

Figure 5. Regional Unemployment Rate, 2014 – 2018



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics Series.

Area Amenities for Visitors

Cities and towns surrounding the eight Hatfield-McCoy Trail systems provide a variety of accommodation, entertainment, grocery, fuel and retail options for visitors to the Trails. Accommodation options include cabins, rental homes, lodges, motels, hotels, campgrounds, RV parks and bed and breakfast establishments. Other amenities provided in the immediate area include ATV rentals, restaurants, information centers, welcome centers, white water rafting, gas stations, grocery stores and local shopping establishments.

Changes in Regional Business Activity

Data from the 2017⁹ release of County Business Pattern data from the U.S. Census Bureau, indicate that there were 188 Arts, Entertainment and Recreation establishments, 109 Accommodation establishments, 809 Food Service and Drinking Places establishments and 284 gasoline stations in the fourteen Hatfield-McCoy counties. Examining trends in regional business activity (as measured by the number of establishments) from 2007 to 2017, we observe a slight increase in the number of Accommodations establishments and a slight decrease in the number of Arts, Entertainment and Recreation establishments. A significant decline is observed for both Food Service and Gasoline Station establishments over the same period. **Table 6** and **Figure 6** provide estimates of establishments from these sector classifications in five-year increments from 2007 to 2017.

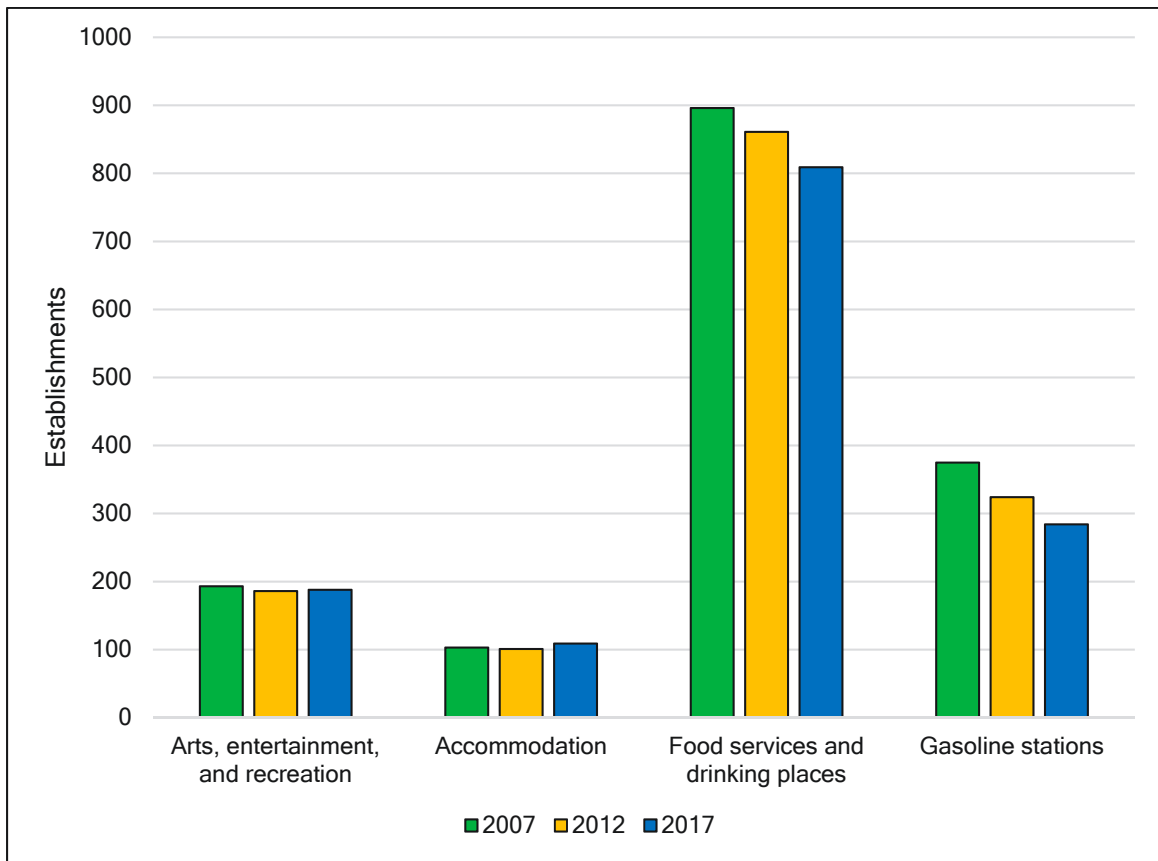
Table 6. HMRRA Establishments in Selected Industries, 2007, 2012 and 2017

Year	Arts, entertainment, and recreation	Accommodations	Food Services and Drinking Places	Gasoline Stations
2007	193	104	900	378
2012	186	101	861	324
2017	188	109	809	284

Source: U.S. Census Bureau of Labor Statistics, County Business Patterns.

⁹ Latest data available from the County Business Pattern series.

Figure 6. HMRRA Establishments in Selected Industries, 2007, 2012 and 2017



Source: U.S. Census Bureau of Labor Statistics, County Business Patterns.

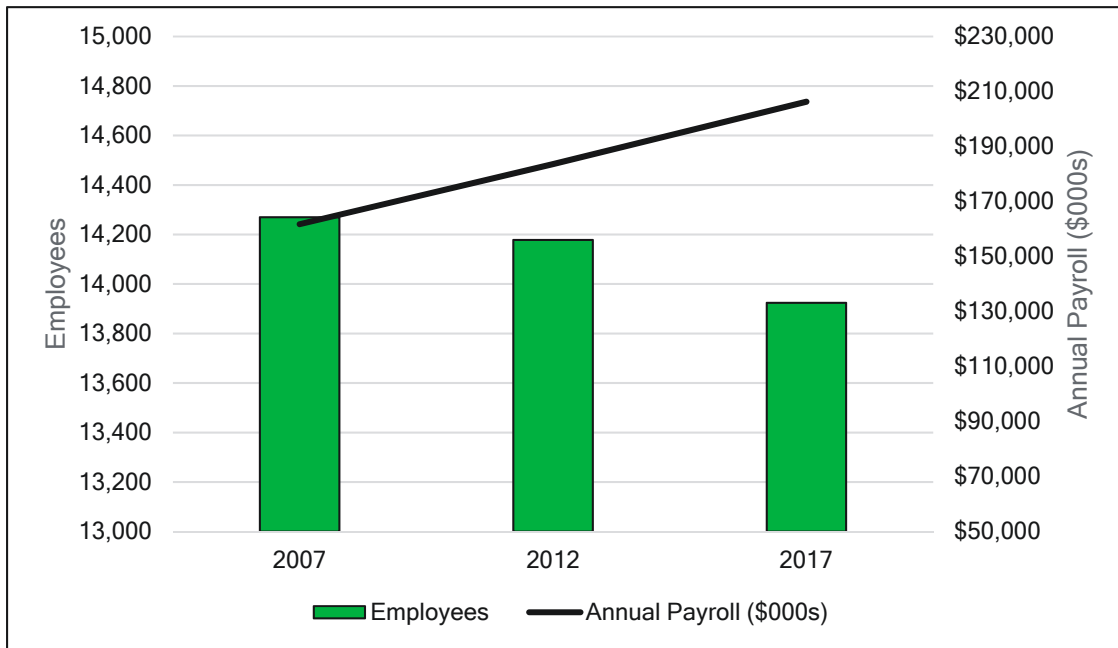
Data disclosure issues prevent the provision of accurate assessments of employment and annual payroll figures for Accommodations and Arts, Entertainment and Recreation establishments in the Hatfield-McCoy counties. However, data is more robust for the Food Services and Drinking Places and Gasoline Station establishments. Employment and annual payroll figures for these two industry sectors are provided in **Table 7** and **Table 8**.

The estimate of Food Services and Drinking Places establishments for the Hatfield Mc-Coy region declined from 900 in 2007 to 809 in 2017, while employment reported for those establishments declined by a little more than two percent (see **Table 7** and **Figure 7**).

Table 7. HMRRA Food Services and Drinking Places Establishment Characteristics

Year	Establishments	Employees	Annual Payroll (\$000s)
2007	900	14,270	\$161,758
2012	861	14,178	\$183,603
2017	809	13,924	\$206,279

Source: U.S. Census Bureau of Labor Statistics, County Business Patterns.

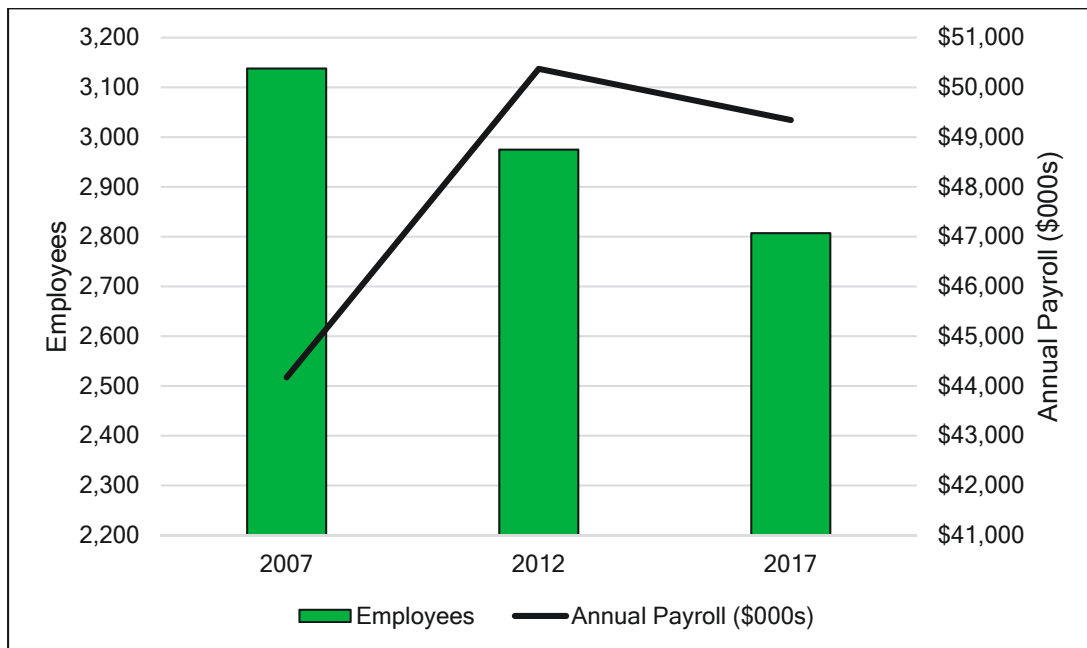
Figure 7. HMRRA Food Services and Drinking Places Employment and Payroll

The estimate of Gasoline Station establishments for the Hatfield Mc-Coy region declined from 378 in 2007 to 284 in 2017, while employment reported for those establishments declined by more than ten percent (see **Table 8** and **Figure 8**).

Table 8. HMRRA Gasoline Station Establishment Characteristics

Year	Establishments	Employees	Annual Payroll (\$000s)
2007	378	3,138	\$44,173
2012	324	2,975	\$50,374
2017	284	2,807	\$49,345

Source: U.S. Census Bureau of Labor Statistics, County Business Patterns.

Figure 8. HMRRA Gasoline Stations Employment and Payroll

Survey Respondent Expenditure Profiles

A total of 2,847 responses to the visitor survey were complete and valid. Of the 2,603 respondents providing information regarding their residence, more than 90 percent were non-local respondents who indicated a non-West Virginia ZIP code, state or country designation.

Across the nine broad expenditure categories, non-local respondents indicated spending more money on their typical visit to the Hatfield-McCoy Trails than their local counterparts (see **Table 9**). On average, non-local respondents report spending nearly \$530 more during a typical visit. Non-local visitors reported larger expenses in each category, with expenditures in food, accommodations and fuel represented the largest differences.

Table 9. Survey Respondent Spending for Local and Non-Local Visitors

Expenditure Category	Non-Local Respondents	Local Respondents
Prepared Food	\$146.37	\$80.96
Groceries	\$106.57	\$60.37
Entertainment	\$52.18	\$22.47
Accommodations	\$432.95	\$227.69
Retail Shopping	\$75.48	\$50.22
Visiting Attractions	\$21.80	\$14.78
Fuel for Vehicles	\$170.15	\$98.59
Trail Vehicle Repair	\$68.32	\$39.80
Other	\$82.64	\$31.67
Total	\$1,156.46	\$626.55

In 2019, more than 56,000 riding permits were sold for the Hatfield-McCoy Trails, of which more than 47,000 were out-of-state permits. Accounting for respondent party size and length of stay, reported spending patterns suggest total non-local visitor spending in excess of \$31.2 million annually. Of this amount, approximately \$18.7 million is estimated to be retained in the state and thus constitutes the direct effect of the economic impact of retail spending from non-local visitors to the Hatfield-McCoy Trails.

Economic and Fiscal Impacts

The estimates generated by the IMPLAN[®] software represent the economic impact of the presence of the Hatfield-McCoy Trails network on the state. This impact is based on the **direct, indirect** and **induced** effects of spending related to the Hatfield-McCoy Trails and non-local visitors. The economic impact is measured in three main categories:

- **Output.** Total output reflects the **dollar value of industry production and represents the total effect of direct, indirect and induced spending** in the regional economy. Output is represented as an annual estimate of the impact of economic activity.
- **Employment.** IMPLAN measures employment in **full-time equivalent (FTE)** positions and reflects the number of FTEs directly and indirectly supported by the facility, as well as FTEs supported by induced spending. Thus, employment numbers provided in the following results reflect both full-time and part-time positions and are not a count of individual jobs.
- **Labor Income.** Labor income is inclusive of **all types of employment income**. This includes employee compensation, such as wages, benefits, as well as income received by those who are self-employed and unincorporated business owners.

Direct, Indirect and Induced Output

For the purposes of this report, two sets of impact estimates are provided. The first focuses solely on estimated visitor spending and the second on operational expenditures. Both impact estimates include 2017, 2018 and 2019. Impacts are statewide and will be seen annually from operations and visitors; although subsequent annual impacts will differ as operational spending changes.

CBER also generated multipliers for the economic activities associated with the Hatfield-McCoy Trail System. Multipliers describe how for a given change in a particular industry; a resultant change will occur in the overall economy. For example, a multiplier of 1.25 implies that for every dollar spent in the economy an additional \$0.25 of economic activity is generated.

Impacts from Operations

Tables 10 through 12 contain the economic impact results for each study period year of operations based on estimated operational expenditures. In 2017, direct spending is estimated to generate approximately \$3 million in indirect and induced spending in the region, **for a total impact of \$6.7 million in economic activity, with a multiplier of 2.04** (see **Table 10** for more detail).

Table 10 – 2017 Estimated Operations Impacts

Impact	Employment	Labor Income	Output
Direct	25.0	\$1,758,642.78	\$3,323,239.82
Indirect	32.0	\$1,024,361.00	\$2,763,357.00
Induced	5.4	\$211,065.00	\$685,909.00
Total	62.4	\$2,994,068.00	\$6,772,505.82
		Multiplier	2.04

As illustrated in **Table 11**, 2018 direct spending is estimated to generate approximately \$4 million in indirect and induced spending in the region, **for a total impact of \$7.9 million in economic activity, with a multiplier of 2.04**.

Table 11 – 2018 Estimated Operations Impacts

Impact	Employment	Labor Income	Output
Direct	25.0	\$1,792,650.52	\$3,916,438.79
Indirect	37.7	\$1,207,210.00	\$3,256,617.00
Induced	6.4	\$248,740.00	\$808,344.00
Total	69.1	\$3,248,600.52	\$7,981,399.79
		Multiplier	2.04

In 2019, direct spending is estimated to generate approximately \$4.4 million in indirect and induced spending in the region, **for a total impact of \$8.8 million in economic activity, with a multiplier of 2.04**. Please see **Table 12** for additional detail.

Table 12 – 2019 Estimated Operations Impacts

Impact	Employment	Labor Income	Output
Direct	24.0	\$1,945,533.52	\$4,348,900.30
Indirect	41.9	\$1,340,513.00	\$3,616,220.00
Induced	7.1	\$276,207.00	\$897,603.00
Total	73.0	\$3,562,253.52	\$8,862,723.30
		Multiplier	2.04

Additionally, the Hatfield-McCoy Trail system is estimated to support an increasing level of total FTEs over the study period (62.4 FTEs in 2017, 69.1 FTEs in 2018 and 73.0 FTEs in 2019) on a near-constant level of direct employment. Operations were estimated to generate about \$2.9 million in total labor income in 2017 increasing to more than \$3.5 million in 2019.

Impacts from Visitor Spending

Tables 13 through 15 contain the economic impact results for each study period year of visitor spending based on reported estimates from the visitor survey and out-of-state permit sales. In 2017, direct visitor spending is estimated to generate approximately \$7.5 million in indirect and induced spending in the region, **for a total impact of \$23.9 million in economic activity, with a multiplier of 1.56** (see Table 13).

Table 13 – 2017 Estimated Visitor Spending Impacts

Impact	Employment	Labor Income	Output
Direct	228.7	\$5,856,383	\$15,330,106
Indirect	26.5	\$1,175,573	\$3,845,258
Induced	37.1	\$1,449,918	\$4,712,931
Total	292.3	\$8,481,874	\$23,888,295
		Multiplier	1.56

2018 direct visitor spending is estimated to generate approximately \$9.3 million in indirect and induced spending in the region, **for a total impact of \$26.0 million in economic activity, with a multiplier of 1.56**. Table 14 provides more detail.

Table 14 – 2018 Estimated Visitor Spending Impacts

Impact	Employment	Labor Income	Output
Direct	249.6	\$6,391,441	\$16,730,716
Indirect	28.9	\$1,282,977	\$4,196,573
Induced	40.5	\$1,582,388	\$5,143,520
Total	319.0	\$9,256,806	\$26,070,810
		Multiplier	1.56

In 2019, direct spending is estimated to generate approximately \$10.5 million in indirect and induced spending in the region, **for a total impact of \$29.2 million in economic activity, with a multiplier of 1.56** (see Table 15).

Table 15 – 2019 Estimated Visitor Spending Impacts

Impact	Employment	Labor Income	Output
Direct	279.5	\$7,155,337	\$18,730,347
Indirect	32.3	\$1,436,317	\$4,698,142
Induced	45.3	\$1,771,512	\$5,758,266
Total	357.1	\$10,363,166	\$29,186,755
		Multiplier	1.56

Visitor spending associated with the Hatfield-McCoy Trail system is estimated to support an increasing level of total FTEs over the study period (292.3 FTEs in 2017, 319.0 FTEs in 2018 and 357.1 FTEs in 2019).

Total Estimated Statewide One-Year Impacts

When combining operations and visitor spending, **the total estimated state-wide impact for 2017 is approximately \$30 million in economic output (a multiplier of 1.64)**, \$11 million in labor income and nearly 355 FTEs. **Table 16** contains the total estimated impacts from 2017 operations and visitor spending.

Table 16 – Combined 2017 Estimated Impacts (Spending and Operations)

Impact	Employment	Labor Income	Output
Direct	253.7	\$7,615,026	\$18,653,346
Indirect	58.5	\$2,199,934	\$6,608,615
Induced	42.5	\$1,660,983	\$5,398,840
Total	354.7	\$11,475,943	\$30,660,801
		Multiplier	1.64

In 2018, operations and visitor spending produce an estimated **state-wide impact of approximately \$34 million in economic output (a multiplier of 1.65)**, \$12 million in labor income and 388 FTEs. **Table 17** contains the total estimated impacts from 2018 operations and visitor spending.

Table 17 – Combined 2018 Estimated Impacts (Spending and Operations)

Impact	Employment	Labor Income	Output
Direct	274.6	\$8,184,092	\$20,647,155
Indirect	66.6	\$2,490,187	\$7,453,190
Induced	46.9	\$1,831,128	\$5,951,864
Total	388.1	\$12,505,407	\$34,052,209
		Multiplier	1.65

Table 18 outlines combined operations and visitor spending for 2019 and is estimated to produce **a state-wide impact of approximately \$38 million in economic output (a multiplier of 1.65)**, \$13 million in labor income and 430 FTEs.

Table 18 – Combined 2019 Estimated Impacts (Spending and Operations)

Impact	Employment	Labor Income	Output
Direct	303.5	\$9,100,871	\$23,079,247
Indirect	74.2	\$2,776,830	\$8,314,362
Induced	52.4	\$2,047,719	\$6,655,869
Total	430.1	13,925,420	\$38,049,478
		Multiplier	1.65

Total full-time equivalent (FTE) positions supported each year due to the presence of the Hatfield-McCoy Trails increased over the study period from 354.7 in 2017 to more than 430 in 2019, an increase of more than twenty-one percent.¹⁰ Total estimates of labor income increased over the study period from approximately \$11.5 million in 2017 to more than \$13.9 million in 2019 (also more than twenty-one percent). Total output is estimated to have increased by approximately twenty-four percent over the study period (from roughly \$30.6 million in 2017 to more than \$38.0 million in 2019).

Fiscal Impact Estimation

The State of West Virginia and the local economies surrounding the Hatfield-McCoy Trails benefit from state and local tax revenue generated from the presence of the trail system and related spending supported by its activities and visitors each year. CBER used two methods to determine a conservative fiscal impact of the presence of the Hatfield-McCoy Trails on the State. Although not comprehensive, these estimates illustrate the scope of additional benefit provided by the Hatfield-McCoy Trails.

The first method considers the fiscal impacts based on sustained employment. The current economic impact analysis determined that an estimated 24 FTE positions are directly sustained by the Hatfield-McCoy Trails year-to-year and that approximately 62.4 FTE positions are sustained statewide. The total estimated amount of tax revenue generated by direct employment exceeds \$173,000. When indirect and induced employments are included, total estimated tax revenue exceeds \$450,000.

Table 19 – State and Local Tax Benefit of the Hatfield-McCoy Trail Employment

	Direct	Total
Initial Business Taxes	\$25	\$65
Business Taxes	\$37,444	\$97,354
Consumer Sales and Use Taxes	\$44,740	\$116,324
Personal Taxes	\$68,467	\$178,015
Excise Taxes	\$21,596	\$56,149
Miscellaneous Fees and Transfers	\$493	\$1,283
Taxes Collected by Counties (state share only)	\$517	\$1,345
Total	\$173,282	\$450,533

¹⁰ With the exception of direct employment by the Hatfield-McCoy Trails, FTE employment in this analysis is derived within the IMPLAN® model.

Sales and use taxes resulting from non-local visitor spending were also estimated. Motor fuel purchases excise tax rates were calculated at 35.7 cents per gallon.¹¹ A six percent sales tax rate for each expense category gathered in the visitor survey was applied to the approximated total expenses for non-local visitors, including:

- Prepared food
- Entertainment
- Accommodations¹²
- Retail shopping; and
- Vehicle repair.

The resulting fiscal impact due solely to sales taxes on non-local visitor spending exceeded \$1.32 million.

Comparison to Prior Estimates

In 2006 and 2014, CBER conducted economic impact analyses of the Hatfield-McCoy Trails network on the State of West Virginia. These two study efforts serve as a useful benchmarking tool to evaluate the progression of the impact of the Hatfield-McCoy Trails on the West Virginia economy by comparing those results with the current analysis.

Comparable estimates of FTE employment and inflation-adjusted¹³ labor income and total output from prior occurrences of economic impact studies undertaken by CBER indicate that growth has occurred in the economic impact of the Hatfield-McCoy Trails, both from increased direct spending as the Trails have expanded as well as from growth in the indirect and induced effects generated by that spending.

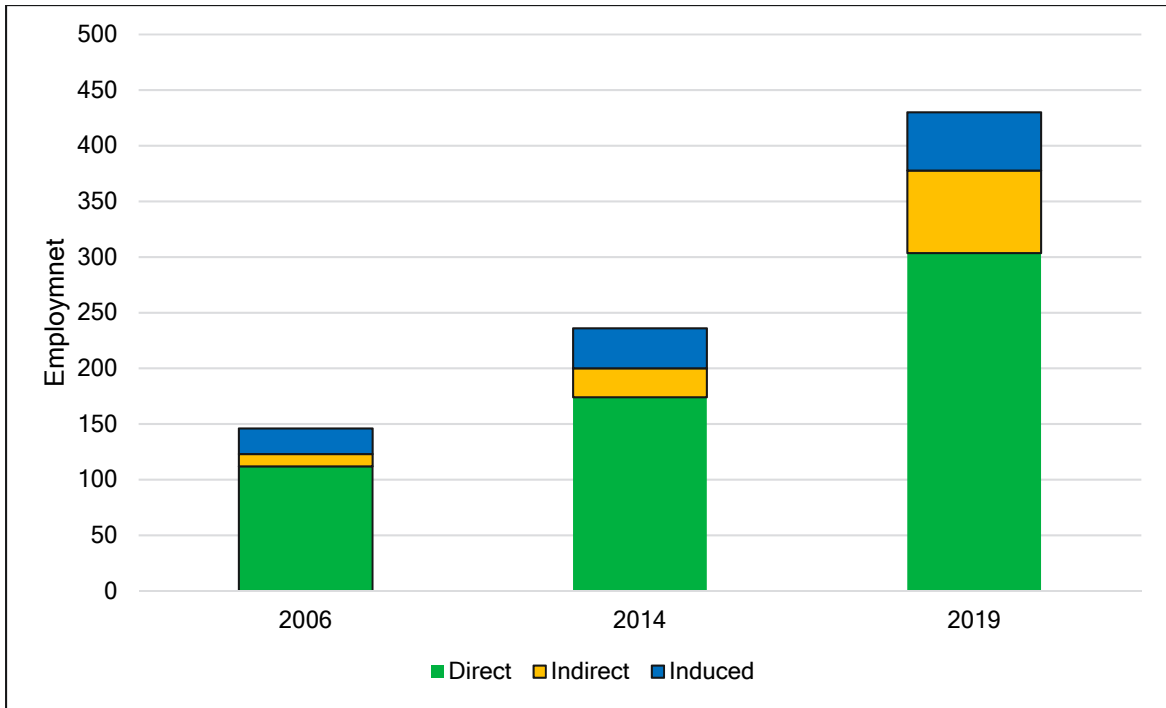
Total estimated impacts of total employment have risen from 146 FTE in 2006 to 236 in 2014 to 430 in 2019. This estimate reflects an increase of approximately 2.9x the FTE level in 2006. **Figure 9** illustrates the increases in FTEs supported by activities related to Hatfield-McCoy Trail operations and visitor spending.

¹¹ This includes \$0.205 flat excise tax per gallon and a variable sales tax rate that cannot be less than \$0.152 per gallon, based on an average wholesale price of \$3.04. Please see West Virginia Tax Laws - Fifty-Third Biennial Report, October 2019.

¹² This does not include locally administered county or municipal hotel occupancy taxes. Please see <https://tax.wv.gov/Documents/TSD/tsd316.pdf> for further information.

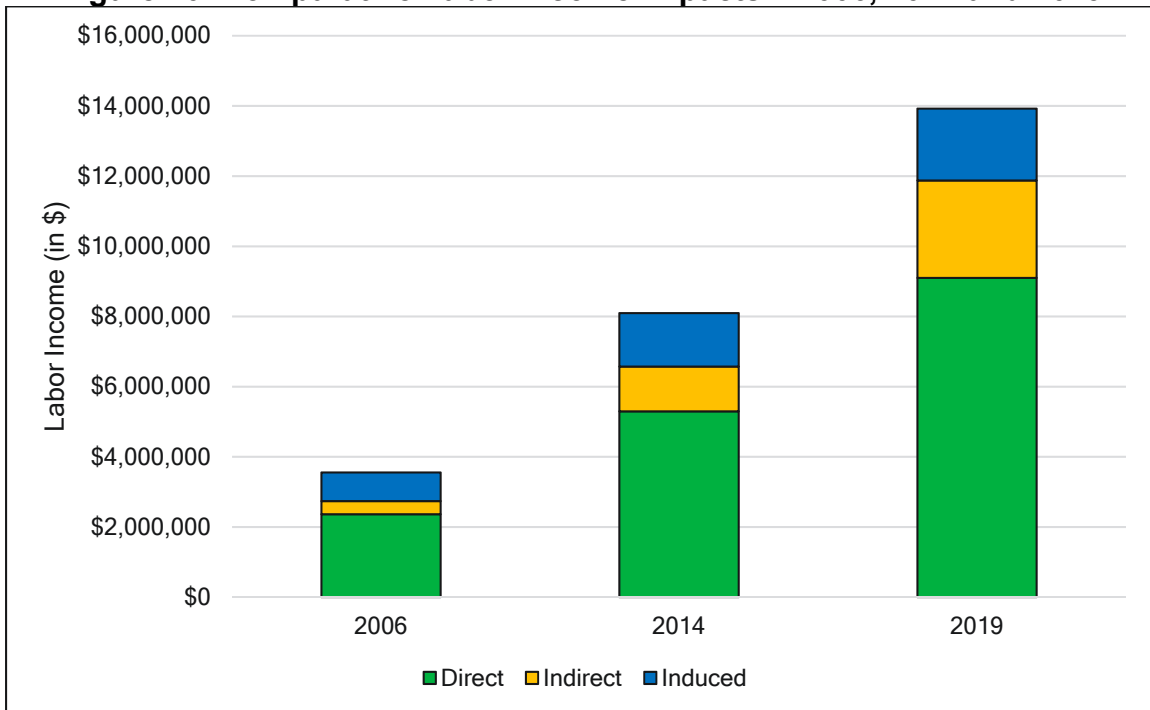
¹³ Output for the 2006 and 2014 CBER economic impact analyses were inflated to 2019 dollars using an inflation calculator provided by the U.S. Bureau of Labor Statistics (BLS).

Figure 9. Comparative FTE Impacts – 2006, 2014 and 2019



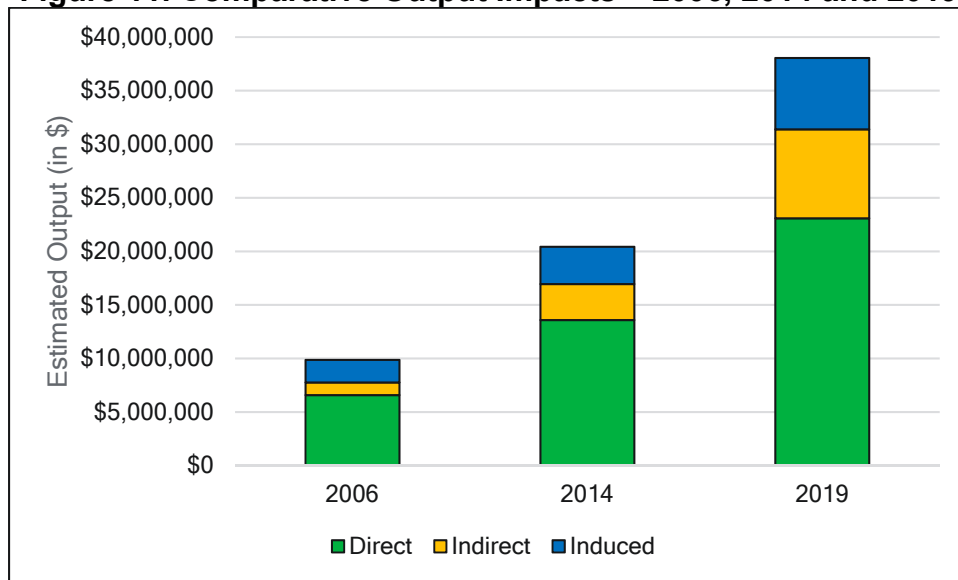
Total labor income impacts are estimated to have increased at an even larger rate, reflecting an increase of approximately 3.9x the total labor income in 2006. Inflation-adjusted total labor income was roughly \$3.5 million in 2006, rising to \$8.1 million in 2014 and to \$13.9 million in 2019. Please see **Figure 10** for more detail.

Figure 10. Comparative Labor Income Impacts – 2006, 2014 and 2019



Total inflation-adjusted estimated impacts of output have risen from \$9.8 million in 2006 to \$20.4 million in 2014 to \$38.0 million in 2019. This estimate reflects an increase of approximately 3.8x the total output level in 2006. **Figure 11** illustrates the increases in total output arising from activities related to Hatfield-McCoy operations and visitor spending.

Figure 11. Comparative Output Impacts – 2006, 2014 and 2019



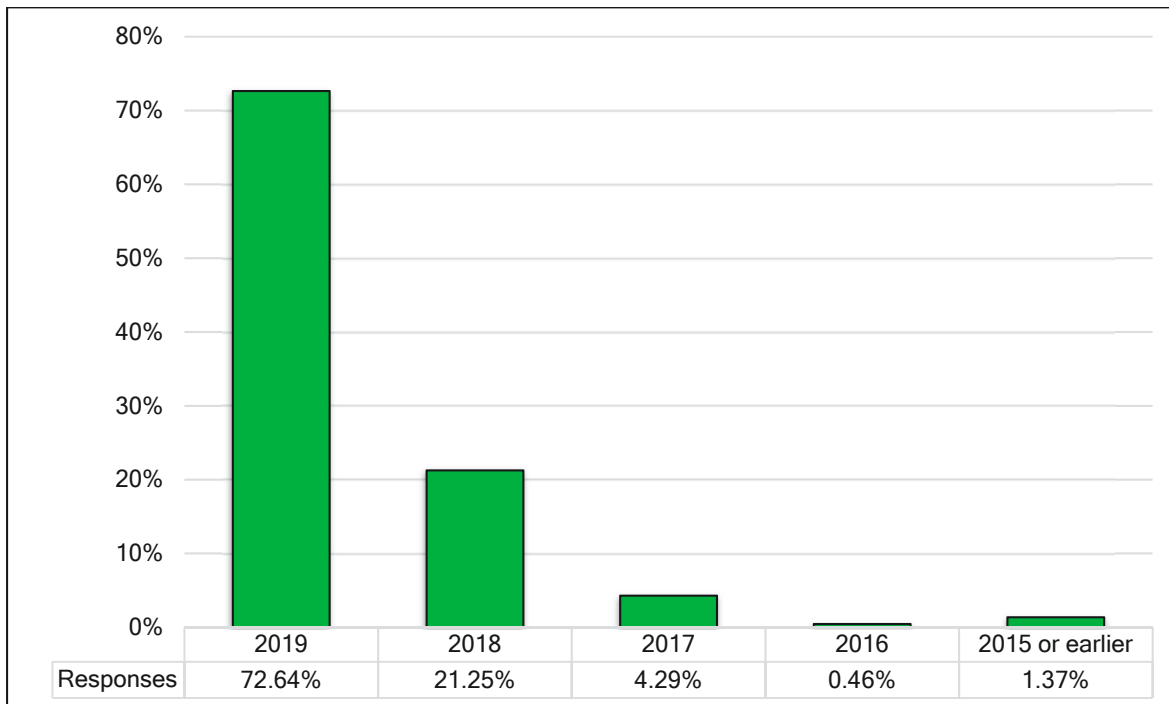
Visitor Survey Results

Surveys were distributed to visitors during the Trailfest in event that occurred on October 10-14, 2019 as well as the general email contact database. A discussion of the results for the 2,847 valid responses is provided below. The survey instrument is provided in Appendix B.

WHEN WAS YOUR LAST VISIT TO THE HATFIELD-MCCOY TRAILS?

Respondents were asked to provide the most recent year that they had visited the Hatfield-McCoy trail system. More than 72 percent of survey respondents indicated that they last visited the trail system in 2019 and nearly 94 percent had visited within the last two years.

Figure 12 – Survey Respondent Most Recent Visit



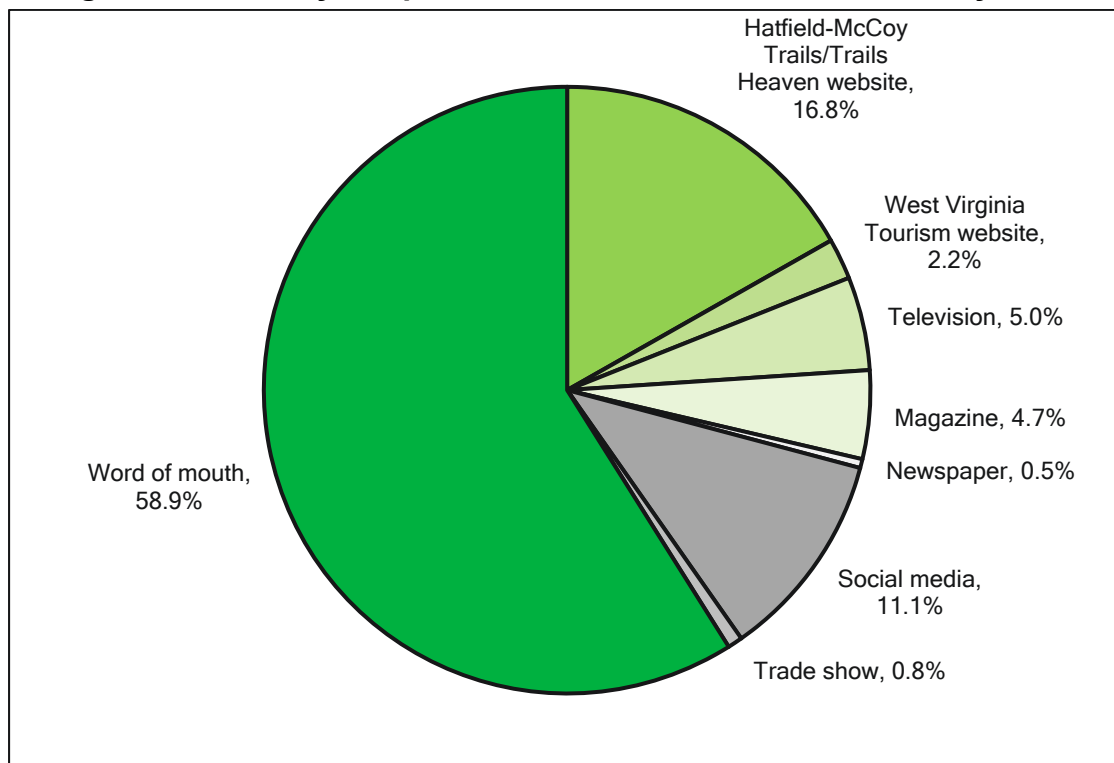
HOW MANY VISITS HAVE YOU MADE TO THE HATFIELD-MCCOY TRAILS IN EACH OF THE FOLLOWING TIME PERIODS?

More than 96 percent of total survey respondents provided valid data on the number of visits they have made to the Hatfield-McCoy trails. Of those, approximately 75 percent indicated visiting the trail system within the last 12 months and more than 81 percent reported making multiple visits.

HOW DID YOU FIRST HEAR ABOUT THE HATFIELD-MCCOY TRAILS?

Survey respondents were asked to indicate how they had first learned about the presence of the Hatfield-McCoy Trails. Roughly 59 percent of respondents indicated that they had first heard of the system through word of mouth. Nearly 17 percent of respondents indicated that they first heard of the trail system through the Hatfield McCoy Trails website and another eleven percent chose social media. Please see **Figure 13** for additional detail.

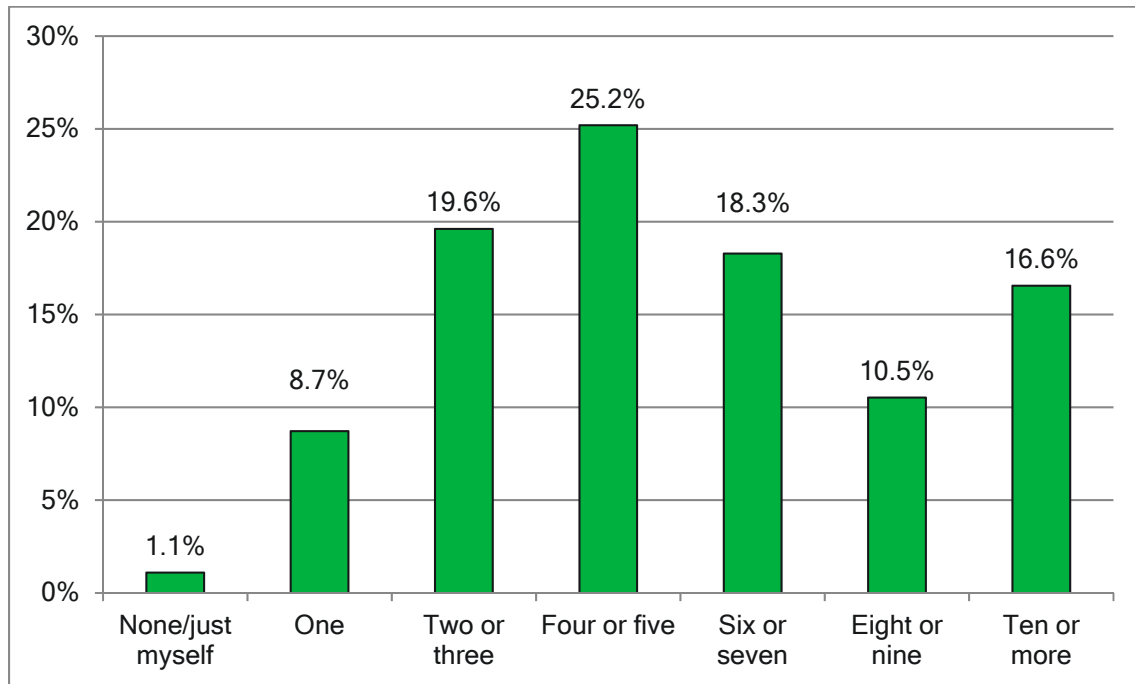
Figure 13 – Survey Respondent, First Learn of Hatfield-McCoy Trails



THINKING ABOUT YOUR TYPICAL VISIT TO THE HATFIELD-MCCOY TRAILS, HOW MANY PEOPLE IN ADDITION TO YOURSELF GENERALLY ACCOMPANY YOU?

Survey respondents were also asked to estimate the approximate size of their party when making trips to Hatfield-McCoy Trails. More than one-quarter of respondents indicated that “Four or Five” people accompany them on trips to the Hatfield-McCoy Trails. Please see **Figure 14**.

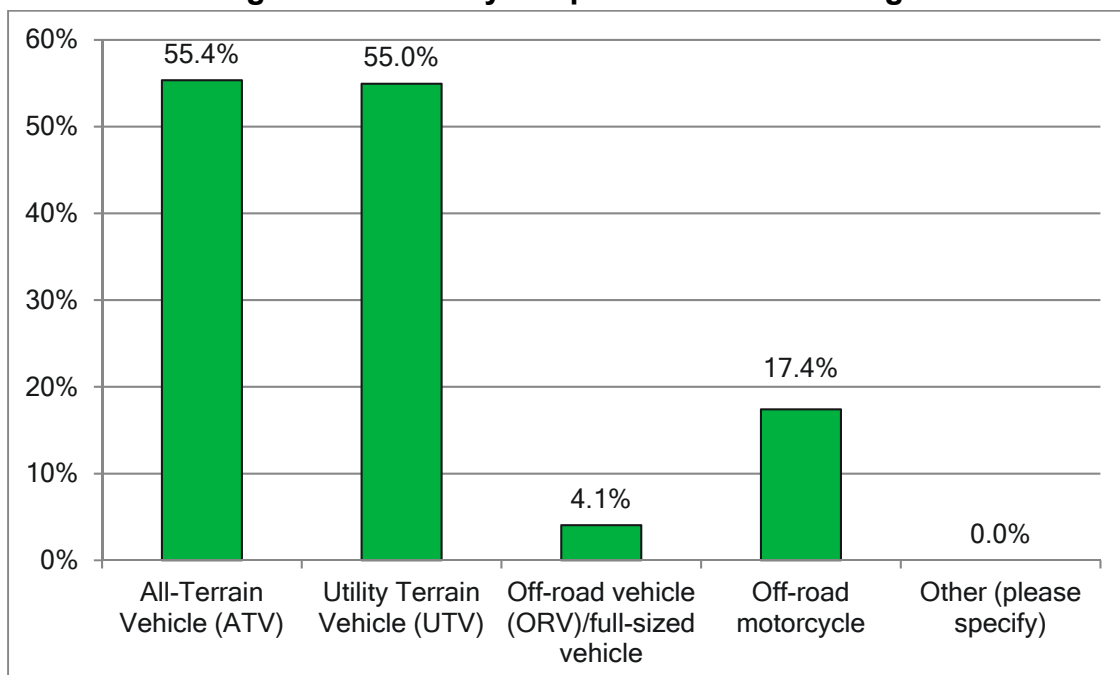
Figure 14 – Survey Respondent Group Size



WHAT TYPE OF VEHICLE(S) DO YOU RIDE?

Respondents were also asked to indicate which types of vehicles they ride (with multiple selections possible). All-Terrain Vehicles (ATVs) and Utility Terrain Vehicles (UTVs) were equally popular among respondents, both accounting for approximately 55 percent of respondents. Please see **Figure 15** for more detail.

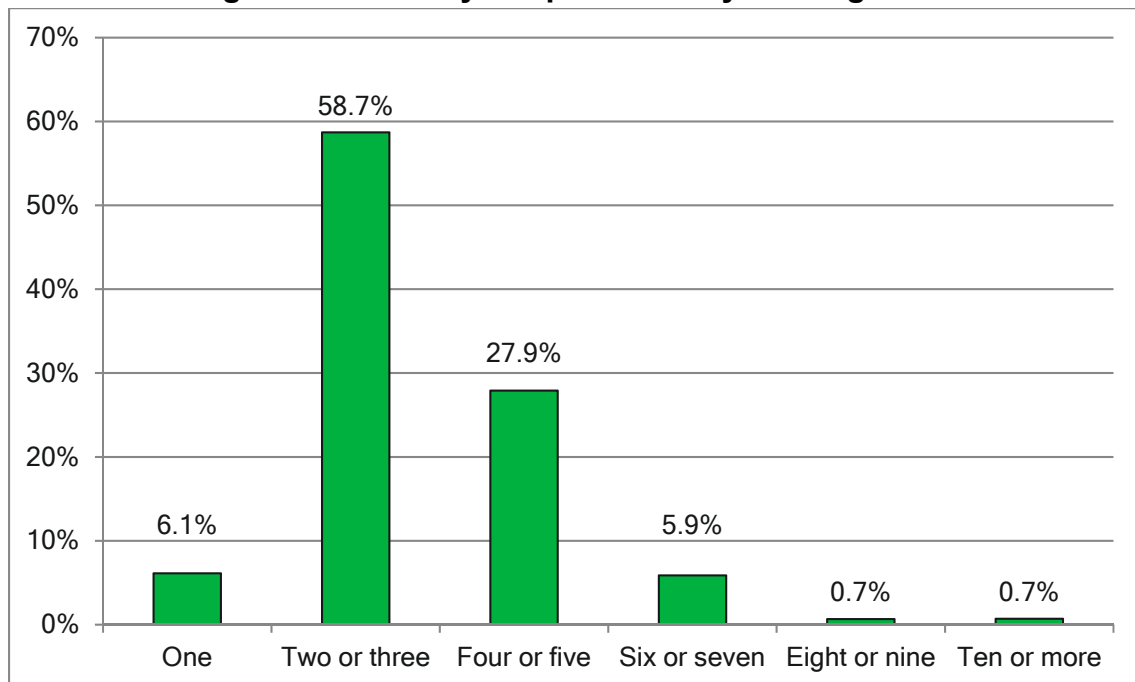
Figure 15 – Survey Respondent Vehicle Usage



THINKING ABOUT YOUR TYPICAL VISIT TO THE HATFIELD-MCCOY TRAILS, HOW MANY DAYS DO YOU TYPICALLY RIDE THE TRAILS?

Figure 16 illustrates the number of days that survey respondents indicated they spent riding the trails during a typical visit. Nearly 60 percent of respondents indicated that they typically spent “Two or three” days riding the Hatfield-McCoy Trails. Another 28 percent indicated riding the trails for “Four or Five” days. These two categories combined account for more than 86 percent of respondent choices.

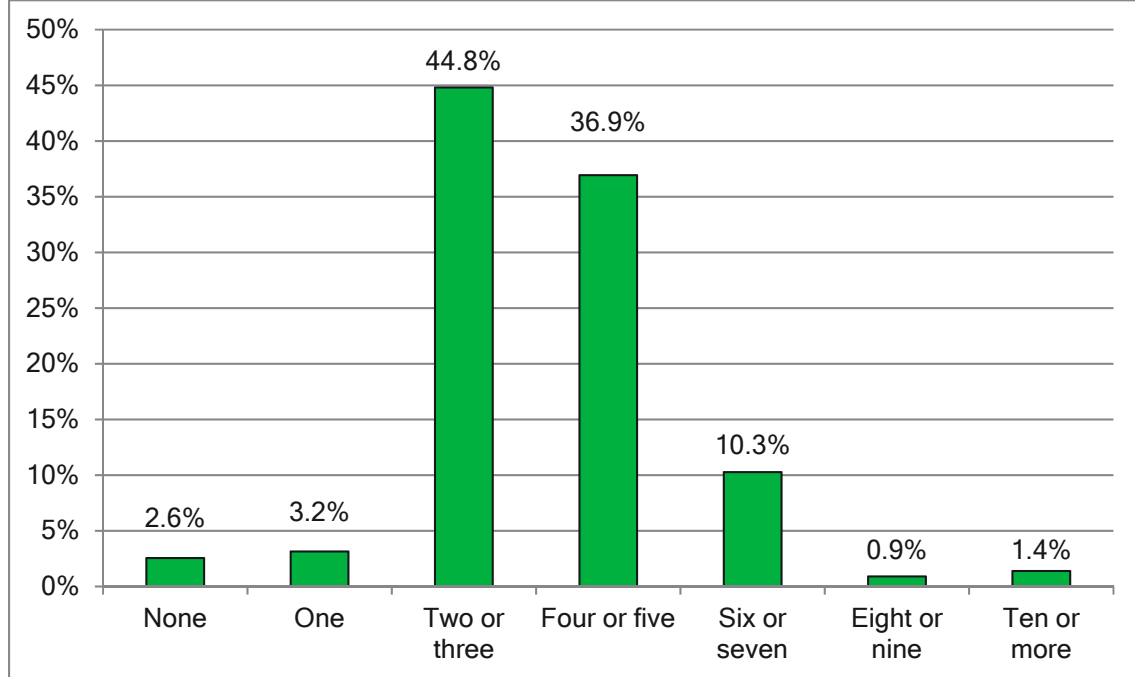
Figure 16 – Survey Respondent Days Riding Trails



THINKING ABOUT YOUR TYPICAL VISIT TO THE HATFIELD-MCCOY TRAILS, HOW MANY DAYS DO YOU TYPICALLY STAY IN THE AREA?

Respondents were asked to indicate the number of days that they stayed in the area during a typical visit. Again, “Two or three” and “Four or Five” days were the most common responses (at 44.8 percent and 36.9 percent respectively). These two categories combined to account for nearly 82 percent of respondent choices. Please see **Figure 17** for more detail.

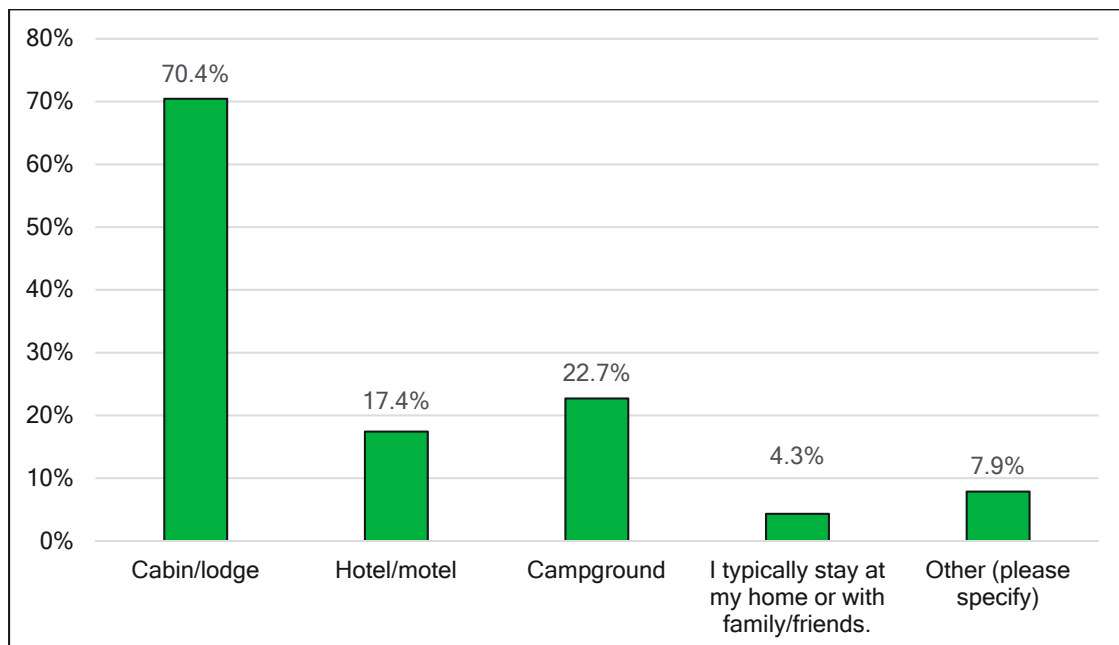
Figure 17 – Survey Respondent Length of Stay in Area



IF YOU STAY IN THE AREA WHILE VISITING THE HATFIELD-MCCOY TRAILS, IN WHAT TYPE OF LODGING DO YOU TYPICALLY STAY?

For those respondents indicating that they stay in the area during a typical visit, more than 69 percent answered that they stayed in a “Cabin or lodge”. Another 22 percent indicated utilizing a “Campground” with another 17 percent staying in a “Hotel or motel”. Please see **Figure 18**.

Figure 18 – Survey Respondent Lodging Usage



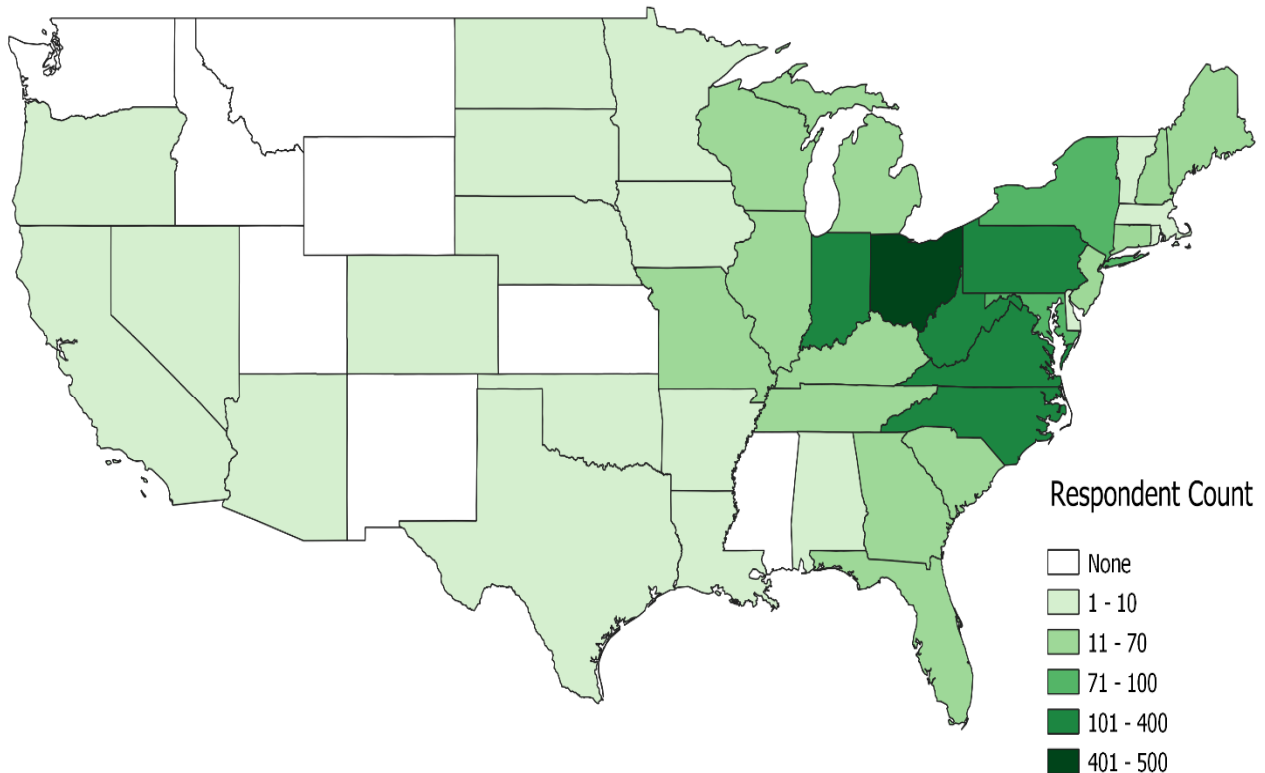
PLEASE TELL US WHERE YOU ARE FROM.

An overwhelming majority of respondents to the survey (nearly 91 percent) indicated that they were from states other than West Virginia. More respondents indicated hailing from Ohio (17.5 percent), Pennsylvania (14.6 percent), North Carolina (14.5 percent) and Virginia (10 percent) than those from West Virginia (9.1 percent). Respondents from other states made up about one-third of the total, but no other state accounted for more than 3.9 percent individually. This roughly corresponds to the number of resident versus non-resident permit sales for 2019 (16 percent resident to 84 percent non-resident). The top ten respondent states are outlined in **Table 20**. A U.S. map illustrating respondent state of residence is provided as **Figure 19** (two respondents indicated foreign residence).

Table 20 – Survey Respondent State of Residence (Ten Largest Percentages)

State	Percent Respondents	State	Percent Respondents
Ohio	17.5%	Indiana	3.9%
Pennsylvania	14.6%	New York	3.6%
North Carolina	14.5%	Maryland	3.5%
Virginia	10.0%	Michigan	2.7%
West Virginia	9.2%	New Jersey	2.6%

Figure 19 – Survey Respondent State of Residence



Conclusions

Activities related to the presence of the Hatfield-McCoy Trails in West Virginia (including operational effects and visitor spending) continue to benefit the state and local economies as it has for roughly two decades. The major difference today is the level of that impact. In 2006, total inflation-adjusted impacts were estimated to \$9.8 million. For 2019, the total estimated economic impact of the Hatfield-McCoy Trails is more than \$38 million (or 3.8 times the level in 2006 even when adjusting for inflation).

Tens of thousands of visitors to the state not only bring tourism dollars, delivering jobs, wages and tax impacts to the region, but also provide an opportunity to enhance the image of the state and its scenic terrain. Further, the Hatfield-McCoy Trails also provide benefits to landowners through public-private partnerships and access to shared services such as insurance, professional management services and law enforcement.

The continued development and enhancement of the Hatfield-McCoy Trail system and related amenities stimulates further improvements for a rugged, rustic and rural region eager for economic drivers and success stories. The Hatfield-McCoy Trail system provides an excellent template for that type of endeavor.

Appendices

- **A - Trail System Overviews**
- **B - Survey Instrument**

Appendix A – Trail System Overviews

Bearwallow Trail System

The Bearwallow Trail System, one of the three original Hatfield-McCoy Trail Systems, is located near the historic site of the 1921 Battle of Blair Mountain. Opened in October 2000, this system has one staffed trailhead in Ethel, WV, that offers restrooms, permit and merchandise sales and a two-acre parking lot. Country Roads Byway Visitor Center serves as an additional trailhead for the Bearwallow System. Bearwallow is the only trail to be open to ORVs as well as ATVs, UTVs and off-road motorcycles and has a community connector to Logan, WV. Most of the Bearwallow system is comprised of “Blue” and “Black” trails (roughly 45 percent and 31 percent, respectively).

Buffalo Mountain Trail System

Buffalo Mountain is another of the original three Hatfield-McCoy Trail Systems opened in October 2000 and is most noted for its historic relevance to the Hatfield-McCoy Feud and Matewan Massacre. It is comprised of roughly 31 percent single-track trails, making it incredibly popular with dirt bike enthusiasts. This system has one staffed trailhead that offers restrooms, permit and merchandise sales and a two-acre parking lot. It also has three community connectors providing direct access to the ATV-friendly towns of Matewan, Delbarton and Williamson, WV. Most of the Buffalo Mountain system is comprised of “Blue” and “Black” trails (roughly 45 percent and 31 percent, respectively).

Indian Ridge Trail System

The Indian Ridge Trail opened in 2007 and is one of three systems that make up the largest continuous area of trails in the Hatfield-McCoy Trails network. It connects to the Pocahontas and Pinnacle Creek trails (allowing for extended off-road trips) and provides riders with direct access to the towns of Northfork and Keystone. Indian Ridge offers one unstaffed trailhead in Ashland, WV with restrooms and a two-acre parking lot. A large portion of the Indian Ridge Trails (roughly 46 percent) are the more difficult “Blue” trails.

Devil Anse Trail System

Devil Anse Trail System links up to two other Hatfield McCoy Trail Systems (Rockhouse and Buffalo Mountain) totaling over 300 miles. The staffed trailhead is located in the town of Matewan and offers restrooms, permit and merchandise sales and a two-acre parking lot. This area is historically known for being the heart of the Hatfield McCoy Feud. The trail system has direct access to gas, food and lodging. More than half of the Devil Anse system are rated as the “Blue” trails. (roughly 53 percent).

Pinnacle Creek Trail System

Pinnacle Creek opened in 2004 and is noted for being one of three systems that make up the largest continuous area of the Hatfield-McCoy Trails network. This trail system is located within 15 miles of Twin Falls State Park and approximately an hour's drive to world-class skiing and whitewater rafting activities. The Pinnacle Creek System has one staffed trailhead in Pineville, WV, which provides restrooms, a two-acre parking lot and permit and merchandise sales to visitors. This system offers mostly "Green" and "Blue" trails (33 percent and 41 percent, respectively) and direct access is available to Pineville and Mullens. The Pinnacle Creek Trails connect to the Warrior, Indian Ridge and Pocahontas Trail Systems.

Pocahontas Creek Trail System

Along with Indian Ridge and Pinnacle Creek, the Pocahontas Trail System is known for being one of three systems that make up the largest continuous area of the Hatfield-McCoy Trails network. Opened in 2012, this system offers a staffed trailhead located in Coaldale that offers restrooms, permit and merchandise sales and a two-acre parking lot just outside of the town of Bramwell. This area is historically known for its numerous millionaire homes from the early 20th century. The Pocahontas System benefits from its location, as it is the Hatfield-McCoy Trail System closest to the I-77 Turnpike. The Pocahontas Trails connect to the Indian Ridge, Pinnacle Creek and Warrior Trail Systems. Its trail difficulty dispersion is mostly "Blue" trails (approximately 47 percent) and "Green" and "Black" trails (22 percent each).

Rockhouse Trail System

The Rockhouse Trail System is one of the three original Hatfield-McCoy Trails opened in October 2000. Offering more than 100 miles of trails, the system provides a variety of difficulty levels ("Green" and "Blue" trails make up 31 percent and 29 percent, respectively). Permitted vehicles include ATVs, UTVs and off-road motorcycles. One staffed trailhead is located in Man, WV, which offers a two-acre parking lot, restrooms and permit and merchandise sales. Riders on the Rockhouse Trail have direct access to the towns of Man and Gilbert.

Warrior Trail System

The Warrior Trail System, which also connects with the Pinnacle Creek, Indian Ridge and Pocahontas trail systems, is located in the City of War (West Virginia's southern-most city). This trail system also accesses the ATV-friendly City of Gary. The Warrior Trail System offers numerous scenic views and has direct access to gas, food and lodging. A staffed trailhead in War, WV offers a two-acre parking lot, restrooms and permit and merchandise sales. Its trail difficulty dispersion is mostly "Green" trails (approximately 52 percent) and "Blue" trails (34 percent).

Appendix B – Visitor and Contact List Survey Instrument

Please take a moment to complete this survey about your experiences visiting the Hatfield-McCoy Regional Recreational Trail system. Your answers will remain confidential and no personally identifiable information will be collected.

1. When was your last visit to the Hatfield-McCoy Trails?

- 2019 2018 2017 2016 2015 or earlier

2. How many visits have you made to the Hatfield-McCoy Trails in each of the following time periods?

Time Period	Number of Times Visited
Within the past 12 months	
Since 2016	
2015 or earlier	

3. How did you first hear about the Hatfield-McCoy Trails?

- Hatfield-McCoy Trails/Trails Heaven website West Virginia Tourism website
 Television Magazine Newspaper
 Social media Trade show Word of mouth

4. Thinking about your typical visit to the Hatfield-McCoy Trails, how many people in addition to yourself generally accompany you?

- None/just myself One Two or three
 Four or five Six or seven Eight or nine
 Ten or more

5. What type of vehicle(s) do you ride? Please select all that apply.

- All-Terrain Vehicle (ATV) Utility Task Vehicle (UTV)
 Off-road vehicle (ORV)/full-sized vehicle Off-road motorcycle

6. Thinking about your typical visit to the Hatfield-McCoy Trails, do you generally make purchases in any the following categories? For affirmative answers: approximately how much money did you typically spend per visit for each category? Please provide your best estimate.

Category	Yes	No	Amount
Prepared food (i.e. restaurant)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Groceries	<input type="checkbox"/>	<input type="checkbox"/>	\$
Entertainment	<input type="checkbox"/>	<input type="checkbox"/>	\$
Accommodations	<input type="checkbox"/>	<input type="checkbox"/>	\$
Retail/souvenir shopping	<input type="checkbox"/>	<input type="checkbox"/>	\$
Visiting other attractions	<input type="checkbox"/>	<input type="checkbox"/>	\$
Fuel for automobile(s) and/or trail vehicle(s)	<input type="checkbox"/>	<input type="checkbox"/>	\$
Trail vehicle repairs	<input type="checkbox"/>	<input type="checkbox"/>	\$
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	\$

- 7. Thinking about your typical visit to the Hatfield-McCoy Trails, how many days do you typically ride the trails?**
- One Two or three Four or five Six or seven
 Eight or nine Ten or more
- 8. Thinking about your typical visit to the Hatfield-McCoy Trails, how many days do you typically stay in the area?**
- One Two or three Four or five Six or seven
 Eight or nine Ten or more
- 9. If you stay in the area while visiting the Hatfield-McCoy Trails, in what type of lodging do you typically stay?**
- Cabin/lodge Hotel/motel Campground
 My home or with family/friends Other (please specify): _____
 I don't stay in the area

The remaining questions are for classification purposes only.

- 10. Please tell us where you are from.**
City: _____ State: _____ Zip Code: _____
- 11. Including yourself, how many persons 18 years of age and older live in your household?**
- One/just myself Two or three Four or five
 Six or seven Eight or nine Ten or more
 Prefer not to answer
- 12. Which broad category best describes your age?**
- 18 to 24 years 25 to 34 years 35 to 44 years
 45 to 54 years 55 to 64 years 65 years or older
 Prefer not to answer
- 13. Which broad category best describes your household income range?**
- Under \$25,000 \$25,000 to \$49,999 \$50,000 to \$74,999
 \$75,000 to \$99,999 \$100,000 to \$149,999 \$150,000 to \$199,999
 \$200,000 or more Prefer not to answer

Thank you very much for your participation in this survey. We appreciate your assistance in helping us better understand the relationship between the Hatfield-McCoy Trails and its patrons.