



2023 State Fair of West Virginia

Economic Impact Study | Lewisburg, WV | August 10-19, 2023

Methodology

DATA COLLECTION

Survey technique	On-site survey
Survey methodology	Respondents recruited at the event
Sample size	800 completed surveys
Days surveyed	All days of fair

ECONOMIC MODELING

Tourism expenditure inputs	On-site survey
Operational expenditure inputs	Accounting records
Economic modeling	Enigma Special Events Impact Model



1. Total economic impact of 2023 State Fair of West Virginia estimated at \$16.9M

- Non-local attendees and event operations resulted in approximately \$12.7M of new spending
- Estimate includes direct, indirect, and induced impact

2. Local employment supported by event

- Equivalent of 178 full-year jobs supported by fair
- Estimated \$2.5M in tax revenue generated by event-related spending

3. Event attracts tourists from many regions

- 61% of attendees resided beyond Greenbrier County
- Among non-locals, 19% resided outside West Virginia

4. Local residents spent \$3.4M related to event

- While not economic impact, demonstrates local support for 2023 State Fair of West Virginia
- Locals spent approximately \$1.2M on food and beverages

5. Sponsors recalled and appreciated by attendees

- US Cellular, TSC Tractor Supply Co, and Pepsi most recalled sponsors
- Majority prefer to do business with companies that support their favorite events

6. Product use and ownership measured

- Survey collected information on fair-goer consumption of products
- Data includes big-ticket purchases and everyday items

7. Food, livestock, and barns top reasons for attending

- 91% came for food vendors or restaurants, 80% experienced livestock shows and barns
- Many also attended for commercial or merchandise exhibits, midway, and free entertainment shows

8. Facebook and event's website most popular information sources

- 82% of attendees obtained information from Facebook, 62% from event's website
- Many also consulted radio and television

9. Attendees want more big-name performers, family activities, and craft vendors

- Respondents were questioned regarding future event programming
- 68% want to experience more big-name performers, 50% want more family activities and craft vendors

10. Event highly rated by attendees

- Majority of respondents rated all aspects of event favorably
- Variety of food/beverage, family activities, and quality of food/beverage ranked highest

Economic Benefits



Economic Benefits



EVENT ATTENDANCE

TOTAL VISITS

185,000

Percentage local (Greenbrier County)

39%

Percentage non-local (beyond Greenbrier County)

61%

Number of locals (Greenbrier County)

13,120 (average attended 5.5 days)

Number of non-locals (beyond Greenbrier County)

30,500 (average attended 3.7 days)

TOTAL UNIQUE ATTENDEES

43,620

Economic Benefits

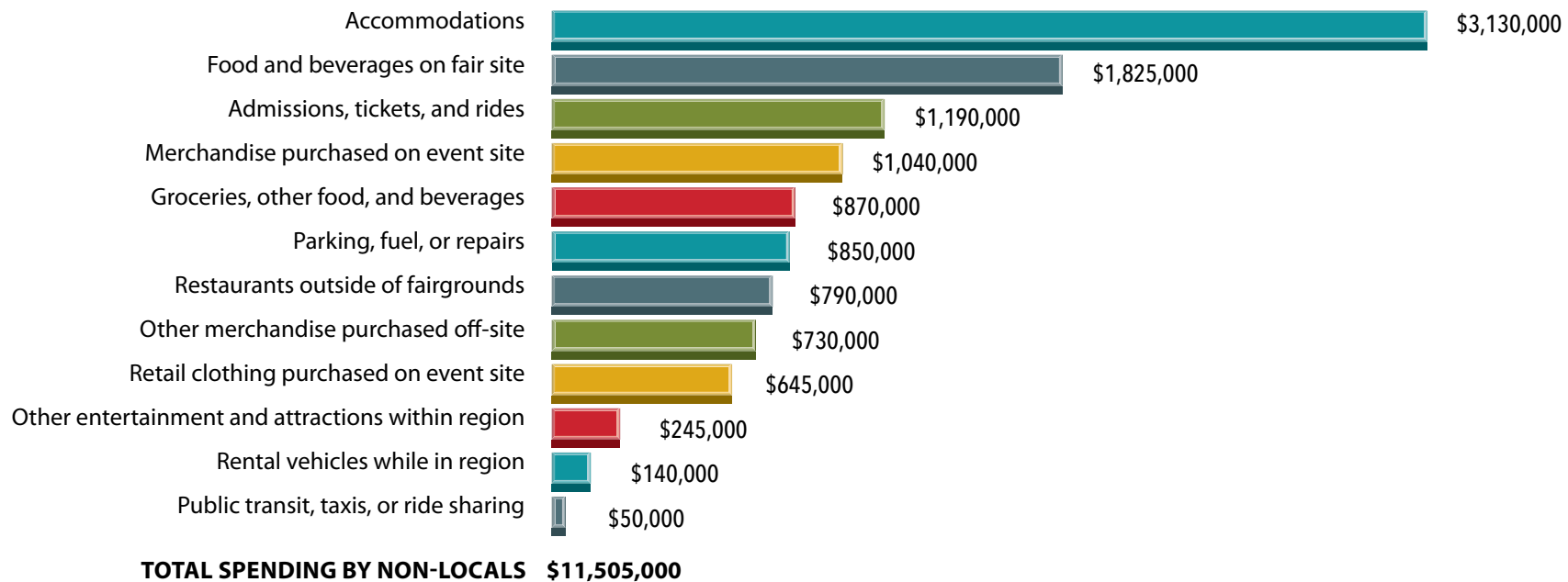
	GREENBRIER COUNTY
INITIAL EXPENDITURES	\$12.7M
<i>Spending by non-local attendees</i>	<i>\$11.5M</i>
<i>Event operations</i>	<i>\$1.2M</i>
INDUSTRY OUTPUT	\$16.9M
<i>Direct & Indirect</i>	<i>\$14.5M</i>
<i>Induced Impact</i>	<i>\$2.4M</i>
EMPLOYMENT SUPPORTED	178
TAXES GENERATED	\$2.5M
<i>Federal</i>	<i>\$1.2M</i>
<i>State</i>	<i>\$1.1M</i>
<i>Local</i>	<i>\$0.2M</i>



Economic Benefits



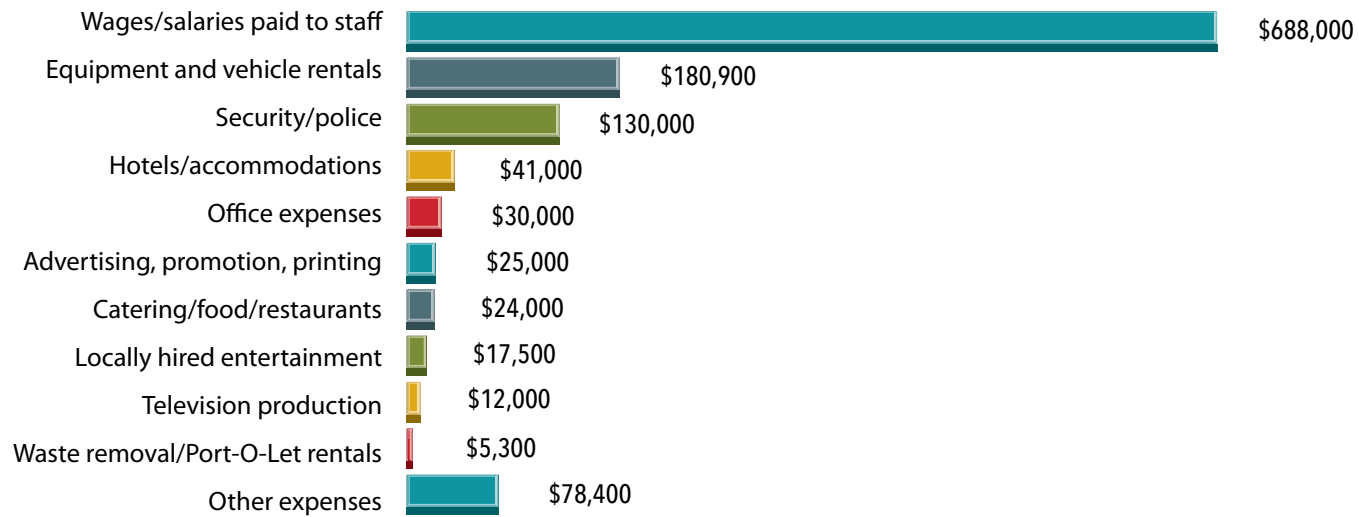
SPENDING ESTIMATES BY NON-LOCALS



Economic Benefits



OPERATIONAL SPENDING (SPENT LOCALLY)



TOTAL OPERATIONAL EXPENDITURES \$1,232,100

Economic Benefits



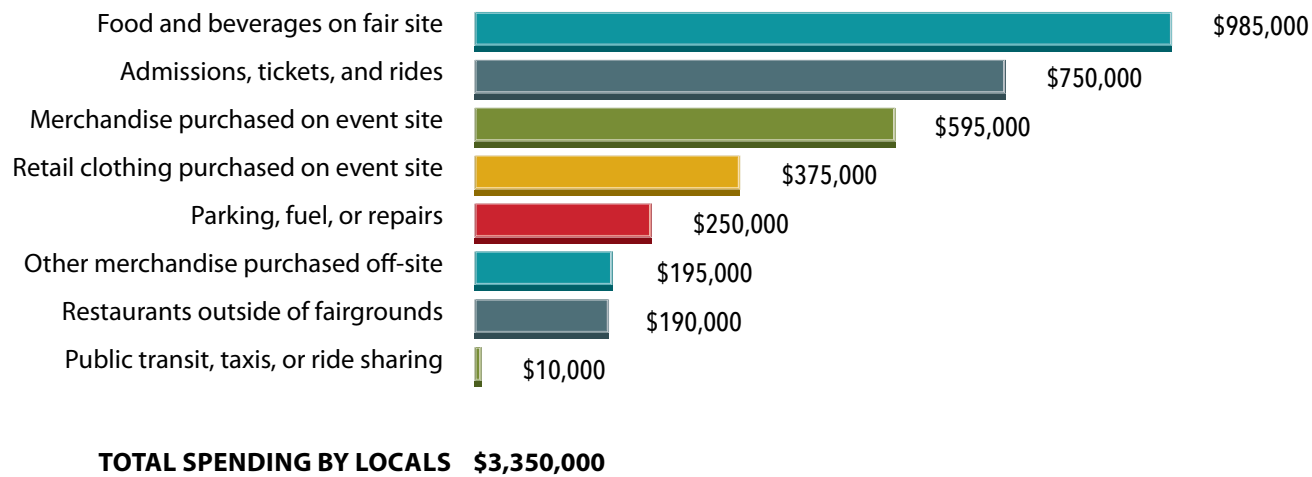
TYPES OF EMPLOYMENT SUPPORTED

Accommodation and food services	112
Retail trade	20
Arts, entertainment, and recreation	10
Health care and social assistance	6
Wholesale trade	5
Administrative and waste management services	5
Manufacturing	3
Transportation and warehousing	3
Real estate and rental leasing	3
Agriculture, forestry, fishing, and hunting	2
Professional, scientific, and technical services	2
Other services	2
Other	5
TOTAL EMPLOYMENT SUPPORTED (FULL YEAR JOB EQUIVALENTS)	178

Economic Benefits



SPENDING ESTIMATES BY LOCALS (NOT ECONOMIC IMPACT)



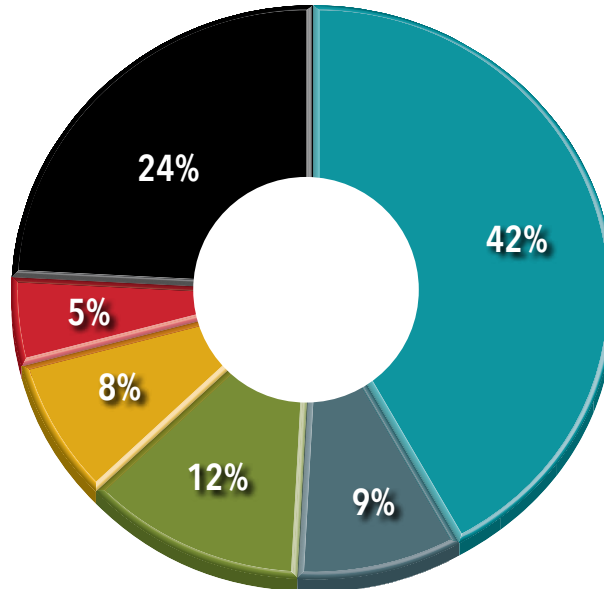
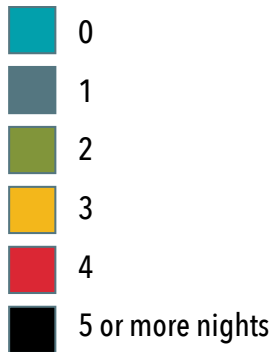
Travel and Tourism



Travel and Tourism



OVERNIGHT STAYS (AMONG NON-LOCALS)



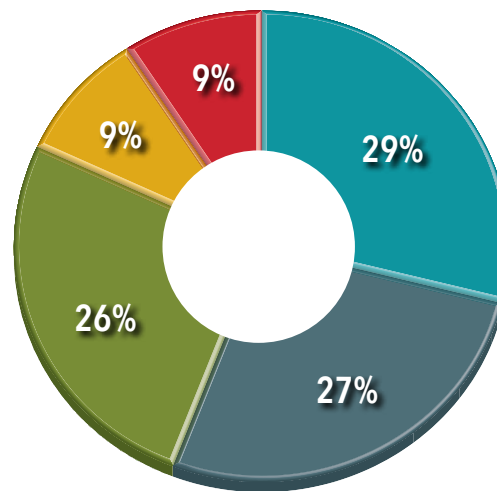
AVERAGE: 2.8 nights

Travel and Tourism



TYPE OF ACCOMMODATION (AMONG RESPONDENTS WHO STAYED OVERNIGHT)

- Camping
- Hotel or motel
- Private home (friend/relative)
- Vacation rental (Airbnb, VRBO, etc.)
- Other accommodations

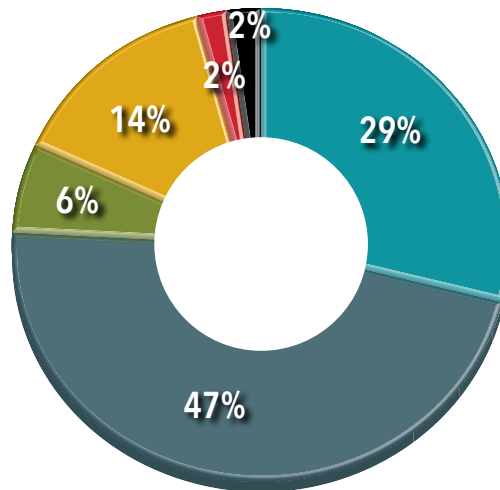


Travel and Tourism



NUMBER OF PEOPLE STAYED IN ROOM (AMONG RESPONDENTS WHO STAYED IN HOTELS)

- 1 person
- 2 people
- 3 people
- 4 people
- 5 people
- 6 people



AVERAGE: 2.2 people

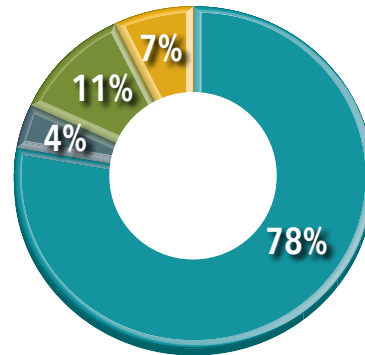
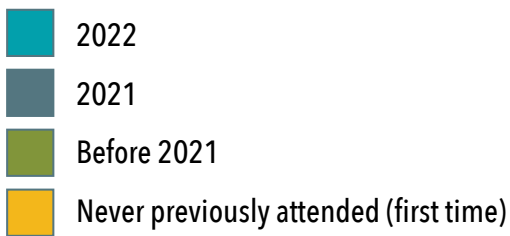
Marketing and operations



Marketing and operations



LAST YEAR ATTENDED

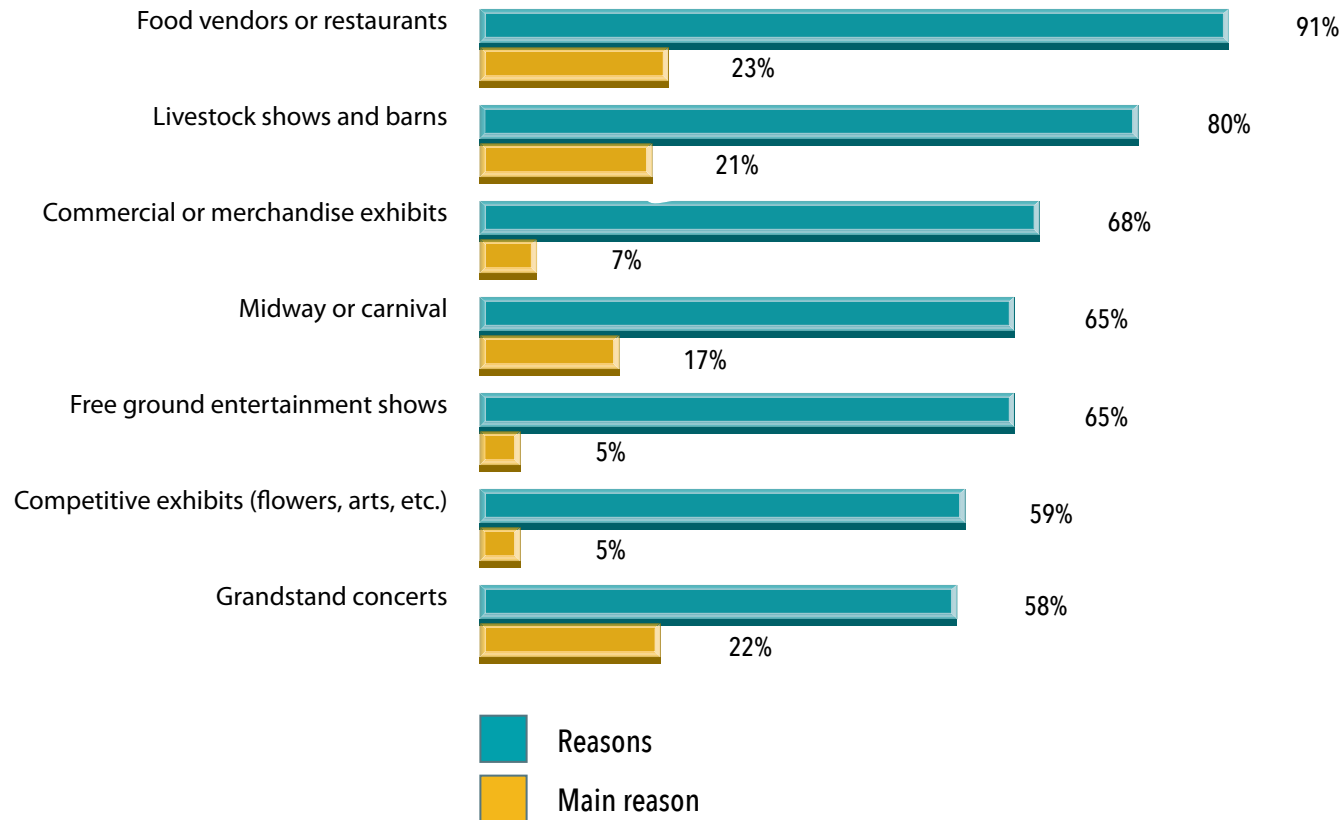


Last year attended	Locals	Non-locals	Under 30	30 - 49	50 and over
2022	92%	71%	81%	82%	82%
2021	3%	4%	3%	2%	4%
Before 2021	4%	15%	6%	11%	11%
Never previously attended (first time)	1%	10%	10%	5%	3%

Marketing and operations



REASONS FOR VISITING THE EVENT



Marketing and operations



REASONS FOR VISITING THE EVENT

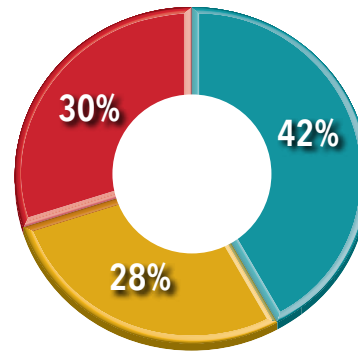
Reasons for visiting the event	Locals		Non-locals		Under 30		30 - 49		50 and over	
	Reasons	Main reason	Reasons	Main reason	Reasons	Main reason	Reasons	Main reason	Reasons	Main reason
Food vendors or restaurants	94%	25%	89%	21%	94%	23%	94%	26%	94%	21%
Livestock shows and barns	81%	19%	78%	22%	90%	21%	84%	19%	81%	29%
Commercial or merchandise exhibits	68%	4%	69%	10%	65%	2%	71%	5%	77%	10%
Midway or carnival	76%	18%	58%	15%	73%	17%	72%	22%	58%	6%
Free ground entertainment shows	64%	4%	66%	6%	67%	6%	67%	3%	73%	8%
Competitive exhibits (flowers, arts, etc.)	59%	5%	59%	6%	54%	4%	65%	6%	70%	7%
Grandstand concerts	67%	25%	51%	20%	65%	27%	60%	19%	51%	19%

Marketing and operations



PREFERENCE FOR PURCHASES

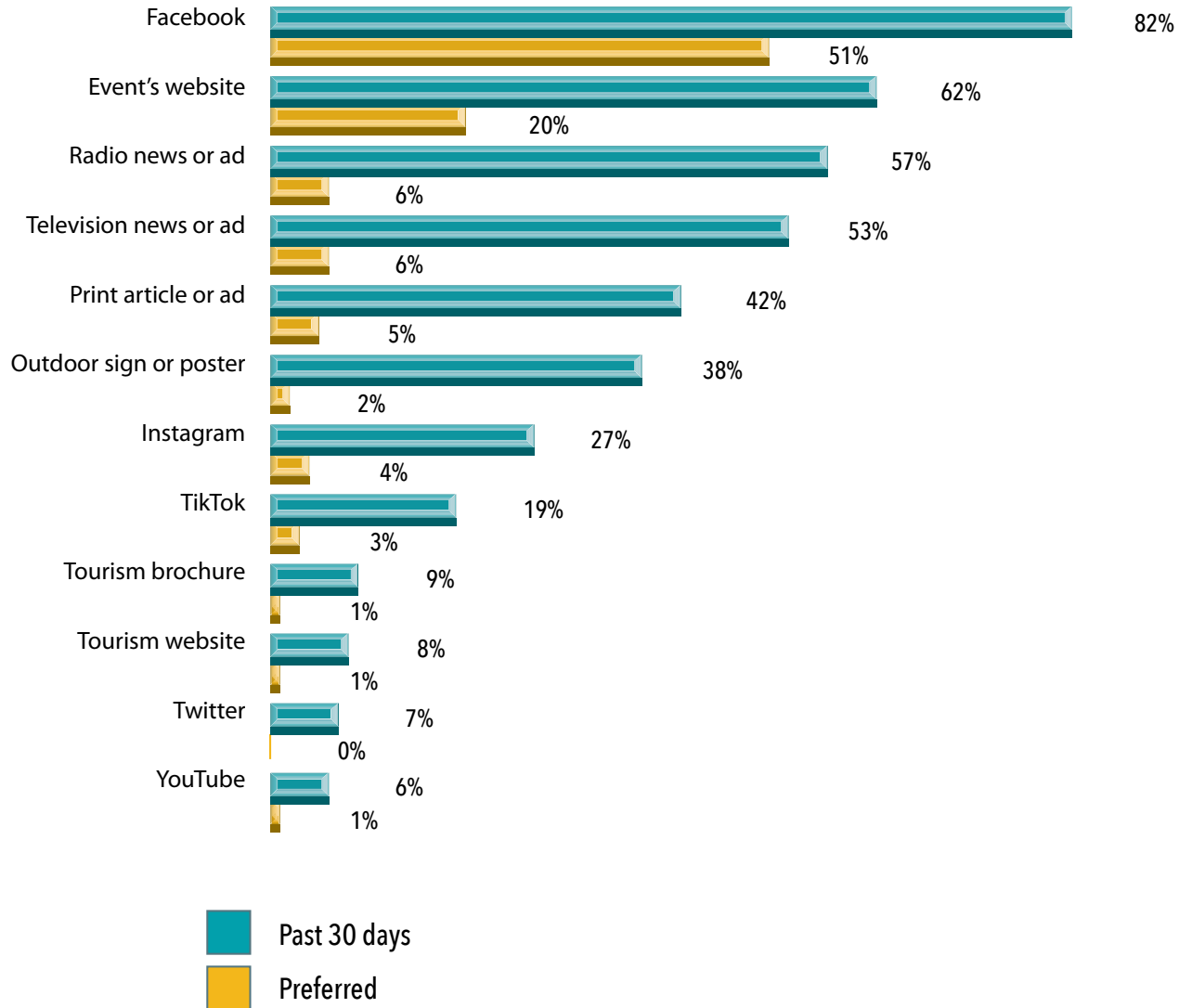
- Paying with cash
- Paying electronically
- No preference



Preference for purchases	Locals	Non-locals	Under 30	30 - 49	50 and over
Paying with cash	44%	39%	52%	39%	38%
Paying electronically	26%	30%	25%	32%	27%
No preference	30%	31%	23%	29%	35%

Marketing and operations

SOURCE OF EVENT INFORMATION (PAST 30 DAYS)



Marketing and operations



SOURCE OF EVENT INFORMATION (PAST 30 DAYS)

Source of event information (past 30 days)	Locals		Non-locals		Under 30		30 - 49		50 and over	
	Past 30 days	Preferred	Past 30 days	Preferred	Past 30 days	Preferred	Past 30 days	Preferred	Past 30 days	Preferred
Facebook	85%	48%	80%	51%	83%	49%	86%	62%	82%	39%
Event's website	64%	16%	60%	22%	59%	13%	63%	17%	66%	29%
Radio news or ad	71%	7%	46%	6%	57%	9%	57%	5%	57%	4%
Television news or ad	63%	8%	45%	6%	51%	4%	46%	2%	61%	12%
Print article or ad	59%	7%	31%	4%	37%	2%	43%	4%	49%	9%
Outdoor sign or poster	53%	4%	27%	1%	49%	4%	37%	2%	33%	1%
Instagram	30%	5%	25%	3%	45%	6%	28%	4%	16%	2%
TikTok	21%	5%	18%	2%	41%	10%	15%	2%	9%	1%
Tourism brochure	9%	0%	10%	1%	9%	1%	8%	0%	10%	1%
Tourism website	5%	0%	10%	2%	7%	1%	7%	2%	7%	1%
Twitter	6%	0%	7%	1%	10%	1%	6%	0%	4%	0%
YouTube	6%	0%	6%	1%	10%	0%	4%	0%	4%	1%

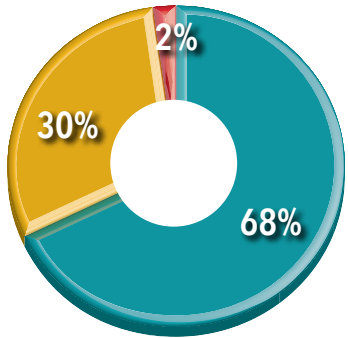
Marketing and operations



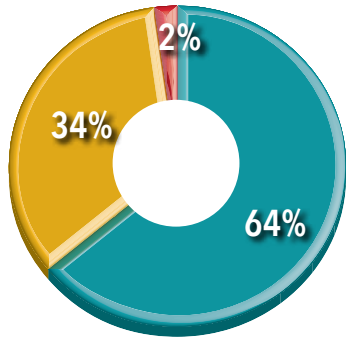
EVENT RATINGS



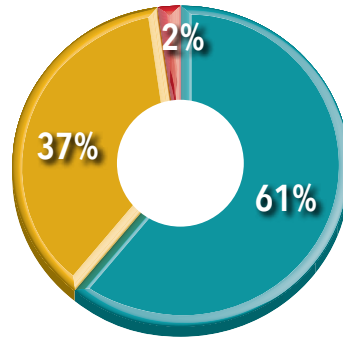
Variety of food/beverage



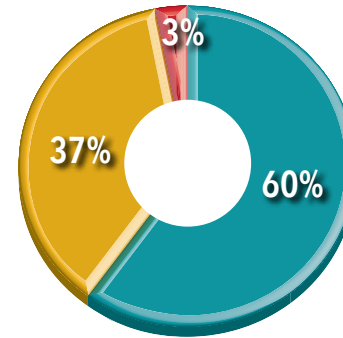
Family activities



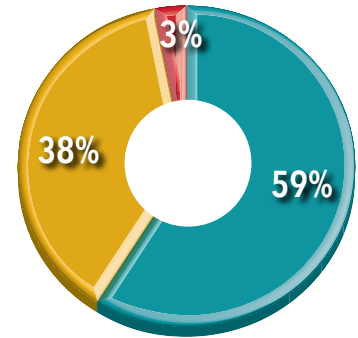
Quality of food/beverage



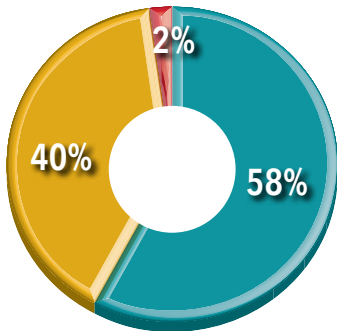
Quality of entertainment



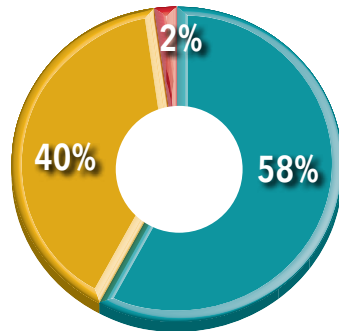
Variety of entertainment



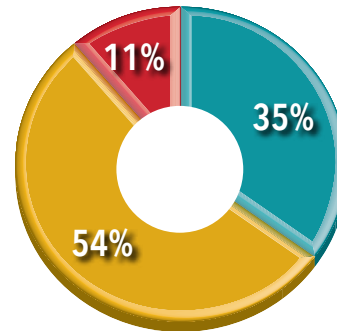
Atmosphere



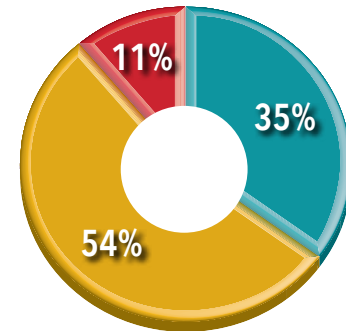
Educational activities



Cleanliness



Green initiatives



Marketing and operations



EVENT RATINGS

Event ratings	Locals	Non-locals	Under 30	30 - 49	50 and over
Variety of food/beverage					
excellent	66%	70%	77%	69%	60%
good	32%	28%	21%	29%	38%
poor	2%	2%	2%	2%	2%
Family activities					
excellent	63%	65%	66%	64%	61%
good	35%	33%	33%	35%	35%
poor	2%	2%	1%	1%	4%
Quality of food/beverage					
excellent	58%	64%	68%	64%	54%
good	41%	34%	31%	34%	44%
poor	1%	2%	1%	2%	2%
Quality of entertainment					
excellent	60%	59%	73%	58%	51%
good	36%	38%	26%	40%	42%
poor	4%	3%	1%	2%	7%
Variety of entertainment					
excellent	58%	60%	73%	58%	50%
good	39%	38%	26%	41%	45%
poor	3%	2%	1%	1%	5%

Marketing and operations

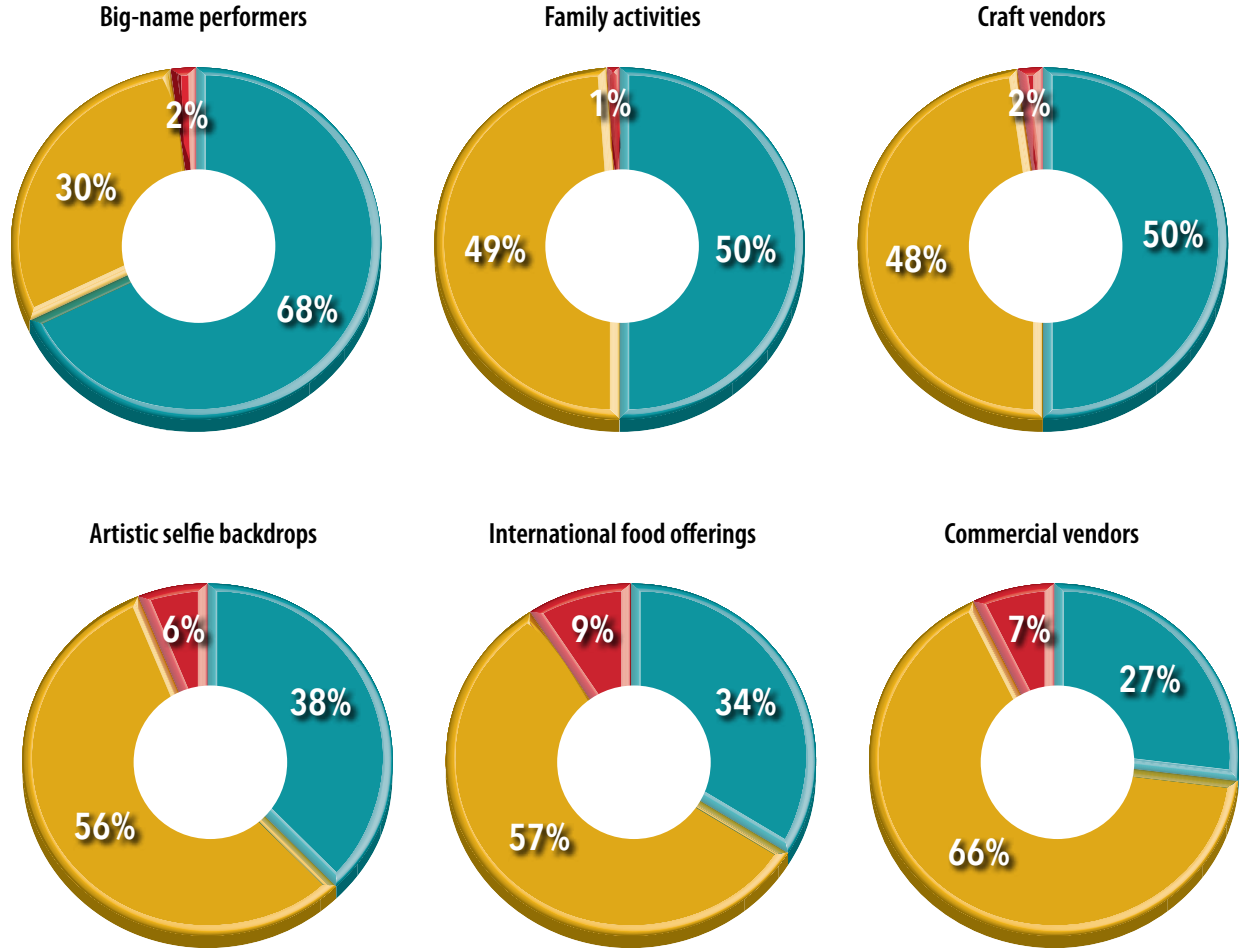


EVENT RATINGS (CONTINUED)

	Event ratings	Locals	Non-locals	Under 30	30 - 49	50 and over
Atmosphere						
	excellent	53%	62%	59%	58%	58%
	good	46%	36%	40%	40%	40%
	poor	1%	2%	1%	2%	2%
Educational activities						
	excellent	56%	59%	58%	62%	54%
	good	42%	38%	40%	38%	42%
	poor	2%	3%	2%	0%	4%
Cleanliness						
	excellent	30%	38%	35%	33%	36%
	good	55%	53%	50%	56%	56%
	poor	15%	9%	15%	11%	8%
Green initiatives						
	excellent	34%	36%	47%	34%	25%
	good	54%	54%	42%	55%	64%
	poor	12%	10%	11%	11%	11%

Marketing and operations

FEATURES WOULD LIKE TO EXPERIENCE AT FUTURE FESTIVALS



Marketing and operations

FEATURES WOULD LIKE TO EXPERIENCE AT FUTURE FESTIVALS



Features would like to experience at future festivals	Locals	Non-locals	Under 30	30 - 49	50 and over
Big-name performers					
more	73%	64%	70%	67%	67%
about the same	25%	34%	29%	31%	31%
less	2%	2%	1%	2%	2%
Family activities					
more	53%	48%	48%	53%	49%
about the same	46%	52%	51%	47%	51%
less	1%	0%	1%	0%	0%
Craft vendors					
more	47%	53%	42%	48%	57%
about the same	51%	45%	54%	51%	42%
less	2%	2%	4%	1%	1%
Artistic selfie backdrops					
more	38%	38%	44%	41%	30%
about the same	56%	56%	50%	53%	65%
less	6%	6%	6%	6%	5%
International food offerings					
more	34%	34%	47%	32%	25%
about the same	57%	56%	51%	58%	61%
less	9%	10%	2%	10%	14%
Commercial vendors					
more	29%	25%	26%	25%	28%
about the same	65%	67%	66%	69%	67%
less	6%	8%	8%	6%	5%

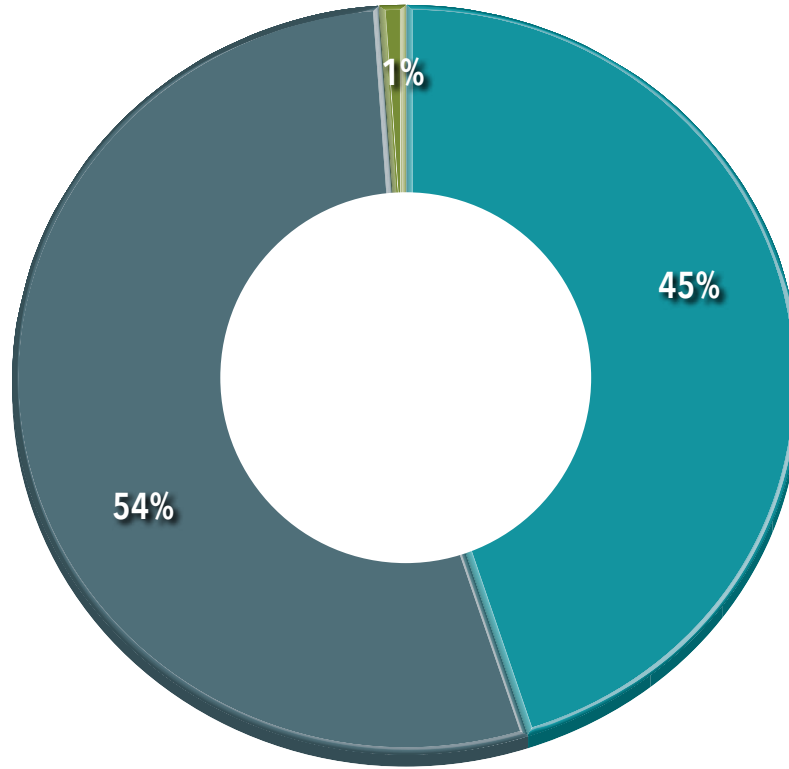
Demographics



Demographics

GENDER

- Man
- Woman
- Non-binary

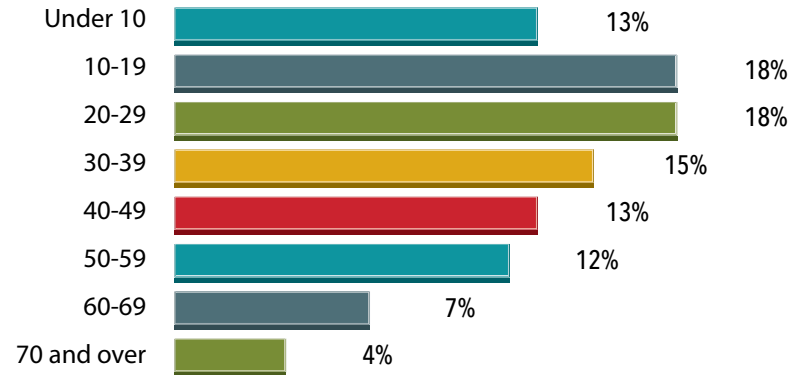


Gender	Locals	Non-locals	Under 30	30 - 49	50 and over
Man	45%	44%	44%	44%	45%
Woman	54%	54%	55%	55%	54%
Non-binary	1%	2%	1%	1%	1%

Note: gender categories include respondent and members of party

Demographics

AGE CATEGORIES

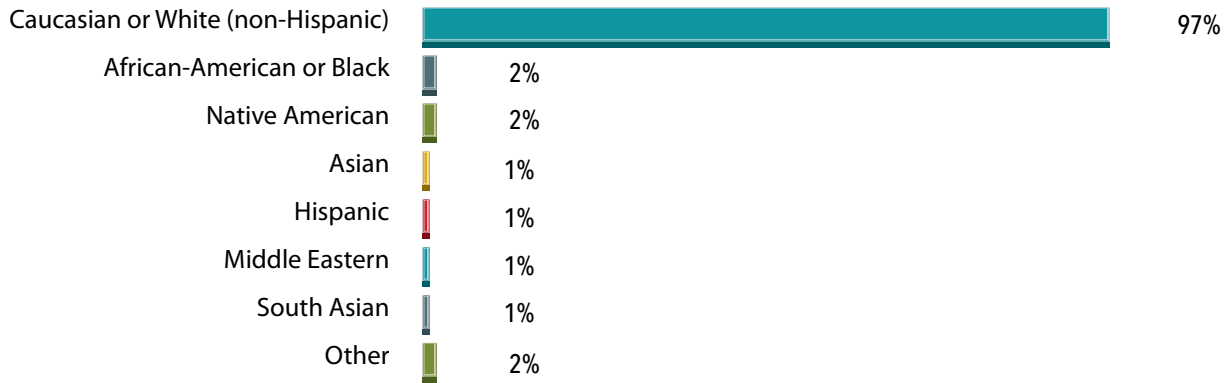


Age categories	Locals	Non-locals
Under 10	15%	12%
10-19	19%	18%
20-29	21%	15%
30-39	14%	17%
40-49	13%	12%
50-59	10%	14%
60-69	6%	7%
70 and over	2%	5%

Note: age categories include respondent and members of party

Demographics

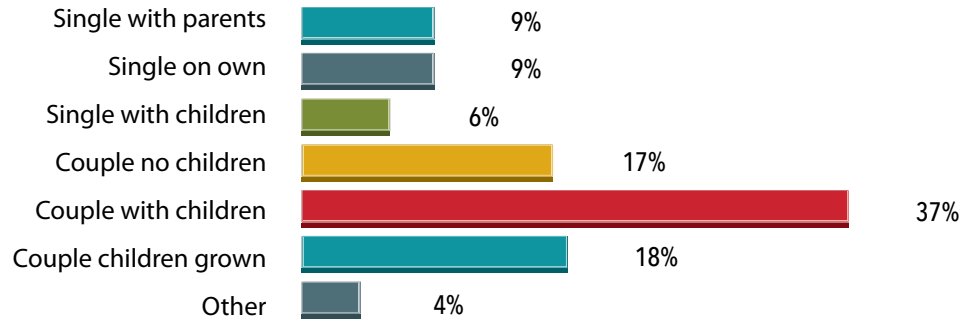
ETHNICITY



Ethnicity	Locals	Non-locals	Under 30	30 - 49	50 and over
Caucasian or White (non-Hispanic)	96%	98%	96%	96%	99%
African-American or Black	2%	1%	3%	1%	1%
Native American	2%	3%	4%	2%	1%
Asian	1%	1%	1%	1%	1%
Hispanic	2%	0%	3%	0%	0%
Middle Eastern	0%	1%	1%	0%	1%
South Asian	1%	1%	2%	0%	0%
Other	2%	2%	3%	2%	1%

Demographics

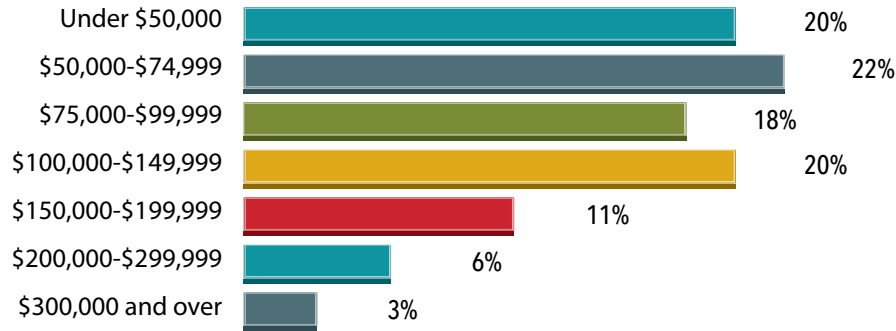
CURRENT LIVING SITUATION



Current Living Situation	Locals	Non-locals	Under 30	30 - 49	50 and over
Single with parents	10%	8%	27%	3%	2%
Single on own	9%	9%	19%	6%	5%
Single with children	8%	4%	2%	9%	5%
Couple no children	16%	18%	27%	10%	16%
Couple with children	38%	37%	18%	61%	23%
Couple children grown	16%	20%	1%	9%	44%
Other	3%	4%	6%	2%	5%

Demographics

ANNUAL HOUSEHOLD INCOME (BEFORE TAXES)

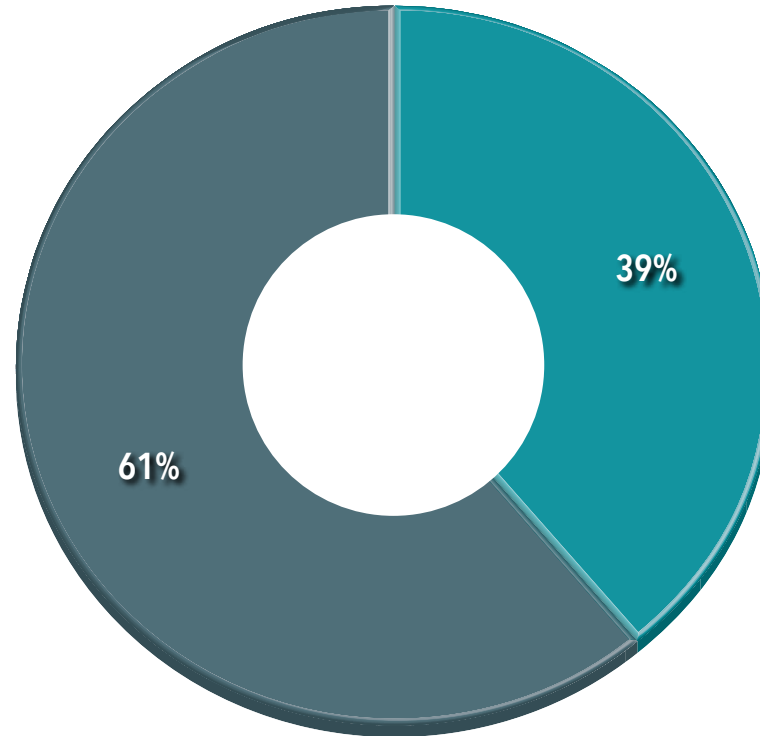


Annual household income (before taxes)	Locals	Non-locals	Under 30	30 - 49	50 and over
Under \$50,000	24%	18%	37%	17%	12%
\$50,000-\$74,999	25%	20%	28%	19%	19%
\$75,000-\$99,999	14%	20%	19%	17%	17%
\$100,000-\$149,999	19%	20%	12%	20%	26%
\$150,000-\$199,999	9%	12%	1%	14%	16%
\$200,000-\$299,999	7%	6%	2%	11%	4%
\$300,000 and over	2%	4%	1%	2%	6%

Demographics

PLACE OF RESIDENCE

- Greenbrier County (Local)
- Outside Greenbrier County (Non-local)

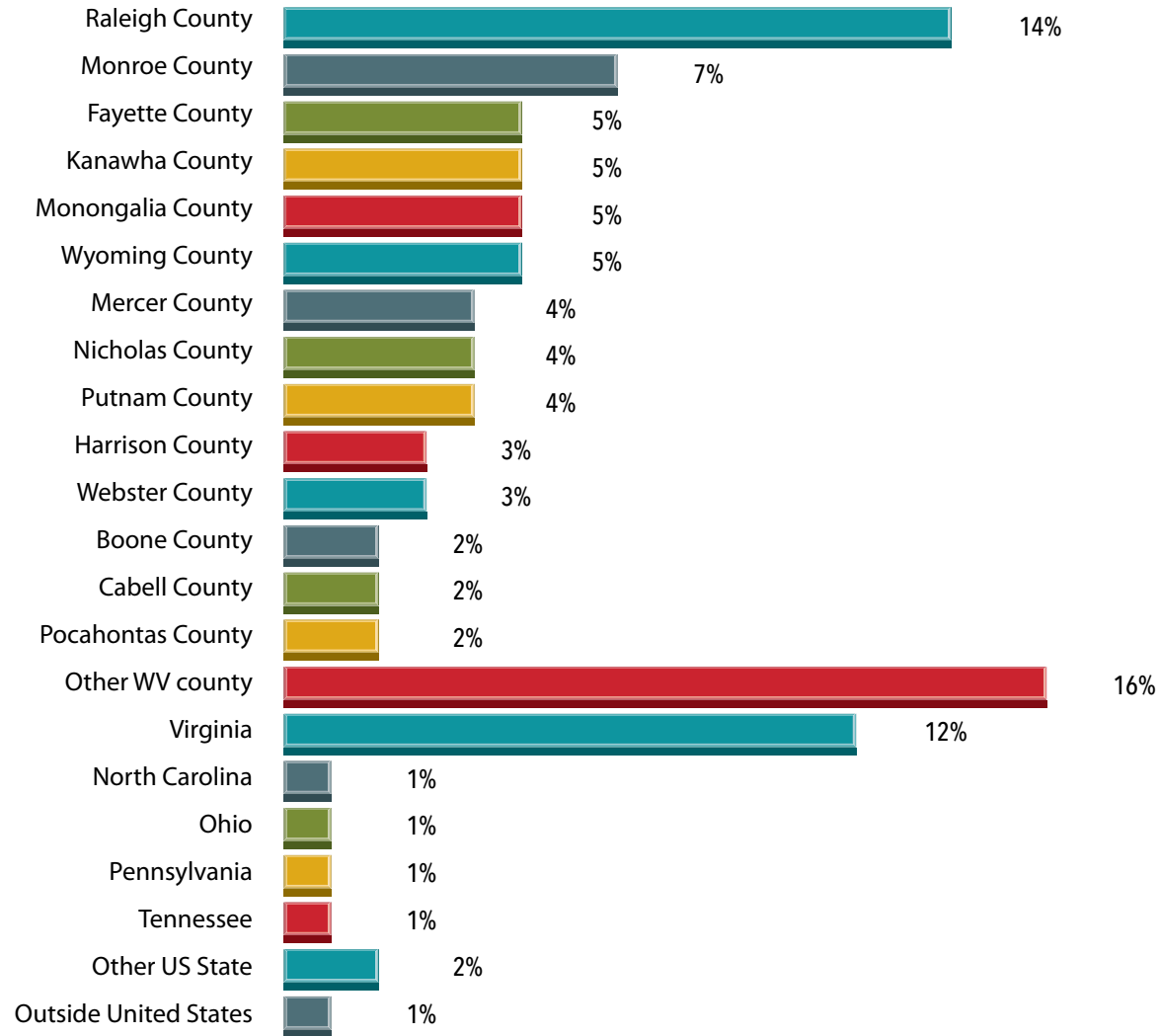


Place of residence	Locals	Non-locals	Under 30	30 - 49	50 and over
Greenbrier County (Local)	100%	0%	50%	43%	38%
Outside Greenbrier County (Non-local)	0%	100%	50%	57%	62%

Demographics



PLACE OF RESIDENCE (AMONG THOSE RESIDING OUTSIDE OF GREENBRIER COUNTY)



Demographics



PLACE OF RESIDENCE (AMONG THOSE RESIDING OUTSIDE OF GREENBRIER COUNTY)

Place of residence (among those residing outside of Greenbrier County)	Under 30	30 - 49	50 and over
Raleigh County	12%	15%	16%
Monroe County	11%	9%	4%
Fayette County	3%	5%	3%
Kanawha County	7%	4%	4%
Monongalia County	5%	8%	2%
Wyoming County	7%	2%	8%
Mercer County	7%	3%	3%
Nicholas County	7%	3%	2%
Putnam County	4%	4%	5%
Harrison County	5%	3%	2%
Webster County	4%	2%	3%
Boone County	7%	1%	2%
Cabell County	0%	4%	0%
Pocahontas County	0%	2%	3%
Other WV county	11%	10%	14%
Virginia	3%	12%	15%
North Carolina	1%	2%	0%
Ohio	0%	1%	3%
Pennsylvania	1%	1%	2%
Tennessee	0%	2%	1%
Other US State	4%	7%	7%
Outside United States	1%	0%	1%