OTDB 2016 Top Priorities

Economic Vitality - Continue the Greatness Program and improve it
Economic Vitality: **David chair**, Scott D. will be vice-chair.

Design - Updating way-finding signage
Design: **Mark chair**, Susan will be vice-chair, Scott S.

Organization - Improve communications and relations with stakeholder groups and other organizations including City Council, Recruit more volunteers for committees including SU Students, Hold Happy Hour events for relationship building
Organization: **Susan and Steve co-chairs**. Mark will be vice-chair. David, Kathleen.

Promotions - Conduct a marketing campaign to promote the OTW Brand including use of promotional give away items, Work with new Tourism Director
Promotions: **Scott S. chair**, Steve will be vice-chair. Andrea.

Additional Priorities:

- Start a downtown murals project perhaps in the Parking Garages
- Secondary District marketing – drive visitors there and do targeted marketing
- Pursue grant opportunities (especially for the secondary district)
- Historic Marker program
- Increase visibility/role of DT Welcome Center
- Improve collection of survey data
- Refine and improve events
- Profile businesses and owners

CITY OF WINCHESTER & FREDERICK COUNTY, VA

2014 Combined Tourism Economic Fact Sheet

Yearly 2014 Tourist Activity in the City and County

- Generated $235.5 million per year in direct tourist spending
- Produced $43.8 million per year in worker income & paychecks
- Created $8.8 million per year in local county & city tax revenues
- Created $7.2 million per year in state tax revenues
- Generated $16.9 million per year in combined state & local taxes
- Generated 2,302 jobs per year
- 2014 Tourist spending increased by 4.4% over 2013

Source [1]

On an Average Day in 2014

Tourist Spending in the City of Winchester & Frederick County:

- Generated $46,180 daily in combined state & local tax revenues
- Created $19,766 daily in local county & city tax revenues alone
- Created $26,414 daily in state tax revenues
- Generated $120,068 daily in worker paychecks

Source [1], [2]

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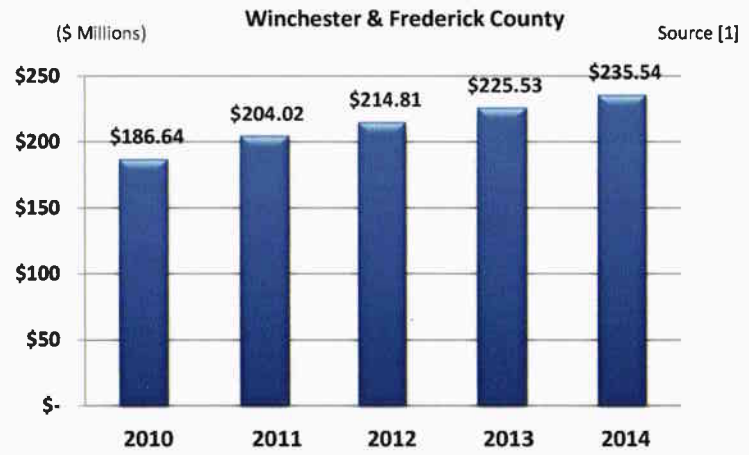
Five Year Trend of Annual Tourist Spending



Source [1]

2014 Tourism Tax Relief on County Households

As a result of taxes generated by tourist spending in Winchester & Frederick County...

- Each of the 43,466 Winchester/Frederick households pay $388 less in local and state taxes. In other words, if tourism did not exist, each household would have to pay $388 more in state and local taxes to replace the taxes generated by tourist spending

Source [1], [2], [3]

Sources: [1] Local Tourism Spending report generated for Winchester & Frederick County by the Virginia Tourism Corporation (VTC) from their website: www.vatc.org. These numbers EXCLUDE indirect, or multiplier impacts.
[2] Additional analysis by Justin Kerns
[3] U.S. Census Bureau, Number of Households in Virginia Counties, 2012.

How have Frederick Co., VA Employment Trends Changed From 2001 to 2014?

Industry (% of total jobs)	2001	2014
Manufacturing	31.12%	21.29%
Retail& Wholesale Trade, Transportation, Utilities	22.25%	27.35%
Education& Health Services	3.56%	8.15%
Prof.& Business Services	12.23%	11.37%
Tourism & Hospitality	8.69%	11.10%
Construction	13.98%	8.40%
Financial Activities	2.68%	6.71%
All other	5.49%	5.63%

Source: U.S. Dept. of Commerce, Bureau of Labor Statistics, Location Quotient & Justin R. Kerns

Winchester/Frederick & Bordering VA Counties
Tourist Spending Comparison

Locality	2013	2014	% Change
Loudon Co.	$1,545,224,847	$1,593,504,616	3.1%
Winchester & Frederick Co. Combined	$225.5 million	$235.5 million	4.4%
Shenandoah Co.	$192.2 million	$199.8 millioin	4.0%
Faquier Co.	$156.5 million	$162.3 million	3.7%
Warren Co.	$125.2 million	$134.0 million	7.0%
Page Co.	$61.9 million	$63.6 million	2.7%
Rappahannock Co.	$20.4 million	$21.1 million	3.7%
Clarke Co.	$18.0 million	$18.6 million	3.3%

Source: Local Tourism Spending report generated by the Virginia Tourism Corporation (VTC) from their industry website: www.vatc.org. These numbers EXCLUDE indirect, or multiplier impacts.

Winchester

Travel Economic Impacts	2010	2011	2012	2013	2014	Percent Change
Employment	937	950	964	995	1,021	2.7%
Expenditures	$ 85,695,330	$ 92,408,099	$ 96,312,054	$ 100,885,780	$ 105,590,928	4.7%
Local Tax Receipts	$ 3,012,258	$ 3,096,691	$ 3,189,007	$ 3,389,110	$ 3,483,083	2.8%
Payroll	$ 16,884,339	$ 17,314,933	$ 17,846,643	$ 18,625,446	$ 19,412,320	4.2%
State Tax Receipts	$ 3,776,050	$ 3,887,087	$ 4,026,905	$ 4,188,812	$ 4,285,161	2.3%

Local Excise Tax Rates	2010	2011	2012	2013	2014	Percent Change
Admissions Excise Tax Rate	5 %	5 %	5 %	5 %	5 %	n/a
Food Service Excise Tax Rate	5 %	5 %	5 %	5 %	5 %	n/a
Lodging Excise Tax Rate	5 %	5 %	5 %	5 %	5 %	n/a
Local Excise Tax Collection						
Admissions Excise Tax Collected	$ 74,998	$ 35,060	$ 32,441	$ 6,717	$ 143,120	2,030.7%
Food Service Excise Tax Collected	$ 4,802,534	$ 5,078,409	$ 5,377,143	$ 5,537,780	$ 5,850,114	5.6%
Lodging Excise Tax Collected	$ 573,326	$ 593,201	$ 622,719	$ 679,845	$ 746,567	9.8%

Notes:

Background

These summary profiles represent locality-specific travel-related data kept by the Virginia Tourism Corporation for the years 2010-2014. Each profile is intended to provide three unique categories of information:

1) The economic impacts of domestic travelers' spending
2) Local Excise Taxes Collections reported to the Auditor of Public Accounts and
3) Local Excise Tax Rates imposed within each locality.

The discussion below explains the topics within each major section in more detail.

Travel Economic Impacts (TEIM)

Frederick

Travel Economic Impacts	2010	2011	2012	2013	2014	Percent Change
Employment	1,103	1,148	1,190	1,253	1,281	2.3%
Expenditures	$ 100,947,391	$ 111,607,661	$ 118,502,919	$ 124,643,682	$ 129,949,843	4.3%
Local Tax Receipts	$ 3,089,006	$ 3,255,895	$ 3,415,800	$ 3,645,142	$ 3,731,655	2.4%
Payroll	$ 19,683,711	$ 20,685,293	$ 21,833,539	$ 23,514,481	$ 24,412,655	3.8%
State Tax Receipts	$ 4,483,787	$ 4,732,357	$ 4,994,466	$ 5,223,031	$ 5,355,877	2.6%

Local Excise Tax Rates	2010	2011	2012	2013	2014	Percent Change
Admissions Excise Tax Rate	0 %	0 %	0 %	0 %	0 %	n/a
Food Service Excise Tax Rate	4 %	4 %	4 %	4 %	4 %	n/a
Lodging Excise Tax Rate	2 %	2 %	2 %	2 %	2 %	n/a
Local Excise Tax Collection						
Admissions Excise Tax Collected	$ 0	$ 0	$ 0	$ 0	$ 0	n/a
Food Service Excise Tax Collected	$ 3,364,544	$ 3,621,407	$ 4,009,506	$ 4,151,563	$ 4,308,621	3.8%
Lodging Excise Tax Collected	$ 370,692	$ 410,889	$ 445,200	$ 440,681	$ 477,493	8.4%

Notes: