

# 2009 Garrett County Tourism Market Survey Report and Economic Analysis

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- Chamber contracted with Recreation, Parks, and Tourism Resources Program of WVU
- Four-season tourism survey: August 2008 – July 2009
- 2,692 out of 4,994 non-locals responded to the survey with at least 600 respondents for each season (3% margin of error)
- Visitors were randomly approached at 21 locations/events by survey team of WVU graduate & undergrad students
- Discount coupons were used as an incentive for survey participants

# Survey Process

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- Wisp - 615
- ASCI - 76
- County Fair - 26
- Honi-Honi - 115
- Art & Wine Festival - 69
- Penn Alps - 264
- Swallow Falls - 571
- Englanders - 174
- Farmer's Market/Candyland - 57
- Autumn Glory - 40
- DCL Discovery Center - 94
- Foodland Fresh - 44
- New Germany State Park - 11
- Deep Creek Dunk - 43
- Arrowhead - 115
- RMLV - 7
- Smiley's Fun Zone - 43
- Highland Festival - 83
- Bill's Marine - 106
- July 4<sup>th</sup> Fireworks - 55
- RMLV Welcome Parties - 84

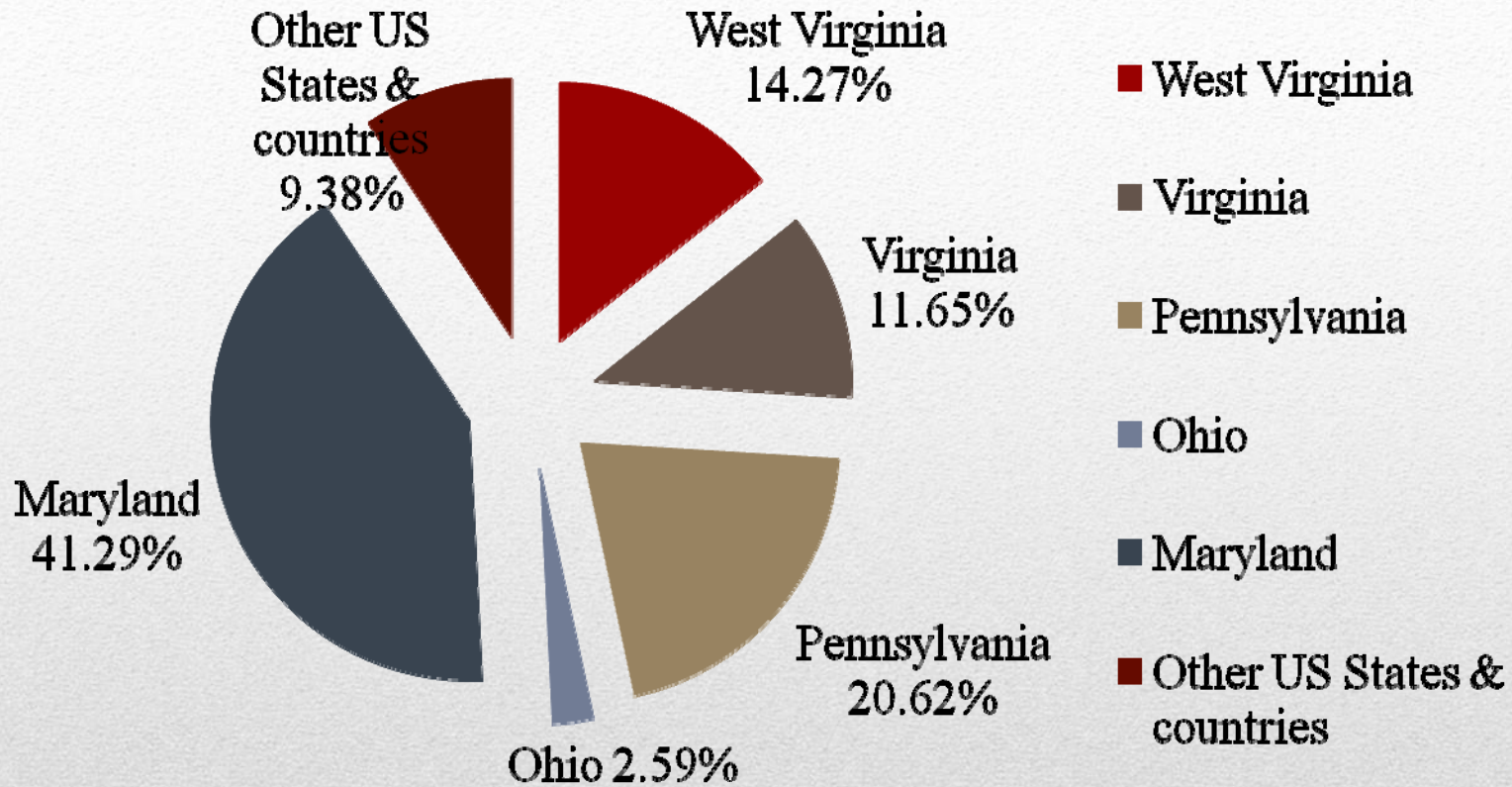
# Survey Locations

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- 56.1% Females / 43.9% Males
- Majority, 39.7%, are 40-54 years old
- 70.1% married
- 52.5% no kids in household
- 39.3% college degree; 37.2% grad degree (well educated)
- 59.5% family income of \$80,000 & over (wealthy)

# Respondent Demographics

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# Visitor Demographics – Market Segments

- Garrett County is leisure/vacation destination – 82.5% list this as primary reason for visiting GC (MD is 72%)
- 81.8% are repeat visitors; 51.3% have visited county more than 10 times
- 25.73% are second home owners; 74.27% are not
- Avg. length of stay is 4.7 nights; summer visitors stay longer avg. of 6.1 nights
- Majority of visitors stay at vacation rental homes

# Executive Summary

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- Avg. group size is 4.9
- 57% are adult visitors without kids in group; 43% travelled with at least one child below age 17 (higher avg. than MD)
- More groups include children in summer and winter (peak seasons) vs. spring and fall (shoulder seasons)
- Visitors plan trip average of 55.1 days in advance – summer trips planned avg. of 85.5 days ahead; 45.1% (majority) of trips planned less than 2 weeks ahead

## **Executive Summary Cont.**

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## **Perceived to be important attractions:**

- 93.5% scenery
- 89% state parks/ state forest
- 84.4% fall foliage
- 81.6% trails
- 76.4% festivals/events
- 76.1% water sports
- 72.6% ski resort

## **Perceived as not important attractions:**

- 66.9% real estate tour / search
- 65.8% farm tours / corn maze

# **Visitor Perception of Tourism Attractions**



- Rest / relaxation
- Have a good time with family
- Adventure seeking
- Nature observation / study
- Opportunities for children

## **Visitor Wants & Needs**

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- 51.2% dining out
- 35.4% cooking in
- 28.5% hiking
- 23.6% photography
- 21.5% Wisp Resort
- 20.1% Swallow Falls
- 12.7% downhill skiing
- 11.4% motor boating
- 10.8% fishing

# Top Visitor Activities

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- Outdoor recreation activities
- Dining
- Snow/ice activities

## **Activities Visitors think are Inadequate**

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- 62.2% not interested in relocation to Garrett County
- Reasons for not relocating:
  - Lack of jobs / employment opportunities (42%)
  - Living cost (12%)
  - Family/friends (9.7%)
  - Rural conditions (7.2%)

## Visitor Interest in Relocation

## **Incl. day trippers & visitors staying w/ family friends:**

- \$94.4 per person per day
- \$256.7 per person per trip
- \$1030.6 per group per trip

## **Overnight visitors only:**

- \$130.3 per person per day
- \$367 per person per trip
- \$1,760.3 per group per trip

❖ Spring visitors spend the least & winter visitors spend the most

# **Average Visitor Spending**

- 1,117,744 Visitors per year (estimated 402,388 summer; 310,733 winter; 240,315 fall; 164,308 spring)
- \$243.32 million in total spending resulting in 3,851 jobs
  - Higher than Mercer (\$108.6 million), Pocahontas (\$100.9 million), and Tucker (\$43 million)
- \$347.65 million in total economic impact resulting in 5,041 jobs

# Economic Impact

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- Second home owners have largest total impact, contributing \$156.5 million in sales, creating 2,275 jobs, and generating approx. \$81.5 million in value added.
- Bed and Breakfast visitors have least impact, contributing \$1.3 million in sales, 20 jobs, and \$0.76 million in value added.

## **Economic Impact Cont.**

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