2009 Garrett County Tourism Market Survey Report and Economic Analysis

Presented by: Nicole Christian, IOM, CCE
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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
• 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 4th Fireworks - 55
• RMLV Welcome Parties - 84
Respondent Demographics

- 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)
Visitor Demographics – Market Segments

- Maryland: 41.29%
- West Virginia: 14.27%
- Virginia: 11.65%
- Pennsylvania: 20.62%
- Other US States & countries: 9.38%
- Ohio: 2.59%
Executive Summary

- Garrett County is a 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
• 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
Visitor Perception of Tourism Attractions

**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 Wants & Needs

• Rest / relaxation
• Have a good time with family
• Adventure seeking
• Nature observation / study
• Opportunities for children
Top Visitor Activities

- 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
• Outdoor recreation activities
• Dining
• Snow/ice activities

Activities Visitors think are Inadequate
Visitor Interest in Relocation

- 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%)
Average Visitor Spending

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
• 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
• 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.