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FINAL REPORT

Allegany County

Visitor Profile Study

February 2021

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PURPOSE & METHODOLOGY



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PURPOSE & METHODOLOGY

Purpose

The overall purpose of this project was to conduct a research based study to gain a better understanding of the Allegany County the Mountain Side of Maryland visitor.

It is important to note that this study was conducted during the COVID-19 pandemic. The purpose of the study is to understand the past behavior one visitors and not make assumptions on future behavior.

Methodology

This project included several pieces of research, each designed to obtain data and feedback from both consumers who have inquired and visited Allegany County, or engaged in some way with Allegany County, the Mountain Side of Maryland tourism. The research reached out to vendors who manage the attractions, hotels, and restaurants your visitors frequent.

Summary of research elements:

- FAM tour of Allegany County
- Mystery shops with 7 local tourism attractions
- 270 Allegany County - Mountain Side of Maryland Visitor Segmentation Study survey's completed
- Inquiry database analysis
- Visitor mobile device data analysis

The quantitative survey consisted of approximated 20 questions targeted to individuals who have inquired about Allegany County the Mountain Side of Maryland in the past 24 months. The survey was designed to uncover what visitors and potential visitors engaged in while visiting Allegany County.

A total of 270 survey's were completed among inquiry records. The 270 completes provides a margin of error of +/- 6.09% at the 95% confidence level. The survey's were completed from August 31, 2020 through October 10, 2020. Mystery shops were conducted October 22-24, 2019.

Objectives

The survey was designed to measure:

- Visitation
- Party composition
- Trip planning habits
- Greatest assets of Allegany County
- Rankings and ratings of how well Allegany County delivers a tourism product
- Demographics
- And more

PURPOSE & METHODOLOGY

DEFINING VISITORS

When visitor profiles studied are conducted the outcome is usually based on demographic information. For example, the Allegany County visitor is more likely to be caucasian, married, 45-64 years of age with an annual household income between \$75,00 - \$150,000. This type of profile only tells part of the visitor profile.

Along with the demographic profile, we also look at the common interest profile. In Allegany County's case, this is extremely important. Understanding common interests of visitors allows a more targeted approach than just using demographic information.

The following report shows what we see as the common interests of the Allegany County visitor as well as their demographic profile.

KEY INSIGHTS & RECOMMENDATIONS



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KEY INSIGHTS

There was a lot of research to sift through; however, this process was designed so the big themes, challenges and ideas continue to surface multiple times. This creates a sense of strong attention and builds confidence as determining an insight to be a key factor in moving forward successfully in identifying and reaching the Allegany County Visitor.

Key Insight #1 - Allegany has a distinct audience that is very satisfied with the experience.

Allegany County has a distinct audience that is caucasian, middle age to older (44-74), married with an income of \$100,000+. Eight in ten are repeat visitors and general stay two-three nights. One in five stay with family and friends.

Allegany County is highly rated and visitors are very satisfied with their experience. Visitors rated six of the eight tourism attributes above a 4.0 on a 5 point scale. Scenic beauty was the top rated attribute at 4.78. Historic attractions, restaurant experiences, activities for the whole family were all rated above a 4.0. The lowest rated attributes were shopping experiences and entertainment experiences.



Key Insight #2 - Interstate 68 plays a key role in Allegany County tourism.

Interstate 68 is the main east west travel artery for visitor traffic from West Virginia to Maryland. I-68 is a 112.9 mile interstate highway that connects I-79 in Morgantown, West Virginia to I-70 in Hancock, Maryland. Texas to Florida and Florida back to Texas.

Repeatedly, hoteliers said a significant book of business are leisure travelers passing through on I-69. Also, the convenience of the limited service hotels, located close to the interstate, and downtown access makes makes Cumberland a great stoping point for travelers.



KEY INSIGHTS

Key Insight #3 - Gaming is a key attraction in Allegany County.

Gaming currently plays a significant role in driving visitors to Allegany County specifically Cumberland. Rocky Gap Casino Resort is an award winning AAA Four-Diamond Resort with a 24 hour casino, spa, dining and a Jack Nicklaus golf Course. Rocky Gap Casino Resort is located next to Rocky Gap State park. The Resort offers scenic views of the Evits Mountains and Lake Habeeb. The golf course is the only Jack Nicolaus Signature course in Maryland. The course was included in GolfWeek magazine's list of best courses to play in Maryland and the best casino courses. Unfortunately, gaming guests generally stay in the casino and do not venture out to other attractions. They are there for gaming. Gaming is big business and generates significant occupancy tax.



Key Insight #4 - Downtown Cumberland and Frostburg are vibrant energy centers of Allegany County.

Downtown Cumberland and Downtown Frostburg are the energy centers for Allegany County. For good reason, there is a lot of activity going on between shopping, dining, parks, exciting new businesses, redevelopment, and convenient access to the most scenic views of Allegany County. Over half of the visitors had visited Downtown Cumberland and over one-third had visited Downtown Frostburg.

The quaint downtowns of Cumberland and Frostburg are essential for generating tourism spending. They offer memorable experiences, such boutique shopping, local and speciality restaurants, hotels, and access to multiple walking tours. The beginning (mile 0) of the Great Allegany Passage bike Trial and the C&O Towpath trail are located in downtown Cumberland. More people in the downtowns equates to increased receipts.



KEY INSIGHTS

Key Insight #5 - The Great Allegheny Passage and the C&O Towpath bike trails elevate outdoor tourism.

The Great Allegheny Passage is a 150-mile rail trail beginning in Pittsburgh, PA at Point State Park and ending in Downtown Cumberland, MD. Cyclists on the trail pass through Cumberland Narrows, cross the Mason-Dixon Line, top the Eastern Continental Divide at 2,392', have beautiful views of the Laurel Highlands while passing through wind farms, coal and steel-making corridor.

According to the Analysis of the Great Allegheny Passage Trail Usage Patterns by Dr. Andrew Herr, Associate Professor of Economics at Saint Vincent College the GAP trail had an estimated 989,455 users which was up 4.6% from 2018. 2020 is a different story. Even with the COVID-19 pandemic, the estimated trail user is 1.491 million. Outdoor recreation has been on the rise for several years but the COVID-19 pandemic has elevated it to a different level. Allegany County fits this market perfectly.

During the in-market visit, we spoke to several parties of all ages, that were traveling on the GAP Trail connecting to the C&O Towpath trail. Hoteliers in the downtown area also made mention of cyclists who were overnight guests. Some were using Cumberland as the terminal of their trip and some were traveling on. Riding from Pittsburgh, PA to Washington, DC. Approximately twenty percent (20%) of the online respondents stated the main purpose of their trip was the Great Allegheny Passage Trail.



KEY STRATEGIES AND RECOMMENDATIONS

Without question, Allegany County is well known as a destination that provides a great visitor experience. It is always import to look at new growth opportunities. COVID-19 proved that is a great way with DMOs having to redirect and rethink what it has to offer. Our strategies and recommendations takes the research conducted and looks for new opportunities to grow your tourism market.

1. A stronger than normal emphasis should be given in messaging outdoor activities.

- Outdoor tourism activities have become a major player in tourism due to COVID-19. Allegany County has plenty of outdoor activities to offer.
- Cycling the Great Allegheny Passage trail and the C&O Towpath is a very popular outdoor activity. Create ways to encourage overnight stays for cycling visitors.
- Cycling is not the only outdoor activity. Allegany County also has first class fishing, hiking, canoeing, kayaking and camping. With the award winning State Parks in the county the opportunity exist to become the outdoor recreation capital of Maryland.

2. Connect and promote African American Heritage in Allegany County

- African American Heritage tourism is quickly becoming a top tourism segment and Allegany County has relevant assets to offer.
- Allegany County is rich in African American history. Especially the stories related to the Underground Railroad and Shanty Town in Cumberland.

3. Figure out a way to expand to younger audiences.

- Currently, the those interested in Allegany County are 45-64 years of age. Since the conversion rate is high (67%), marketing to the audience could expand your visitor mix. Marketing might include:
 - Packaging the GAP Trail with the downtowns
 - Creating specific promotions for a younger audience (Brew tours, etc..)
 - Create packages that include the downtown experiences, history and the outdoors.

4. Expand the Great American Road Experience experience.

- Due to COVID-19, road trips have become more popular. Allegany County has such a distinct audience currently that is very satisfied with their experience, the opportunity exists to expand road trips along the Great American Road to locations off the beaten path.

KEY STRATEGIES AND RECOMMENDATIONS

5. Continue to concentrate on developing a robust Allegany County inquiry database to conduct on-going research.

- Having a robust inquiry database is critical to understanding the Allegany County visitor. This database allows the opportunity to reach out to those who are interested in Allegany County as a destination. The goal should be collecting 5,000 - 10,000 records per year.
- All marketing efforts should be directing consumers to the website to request information. This process is trackable and important to continually understand the visitor.
- Conduct an annual evaluation of inquiry point-of-origin. This type of yearly evaluation provides data to determine which efforts have the best return-on-investment.
- Begin to monitor in detail the Smith Travel Research occupancy data and average daily rate and compare the data to competitive markets.
- A visitor profile conversion study is recommend every three to five years.

STUDY FINDINGS



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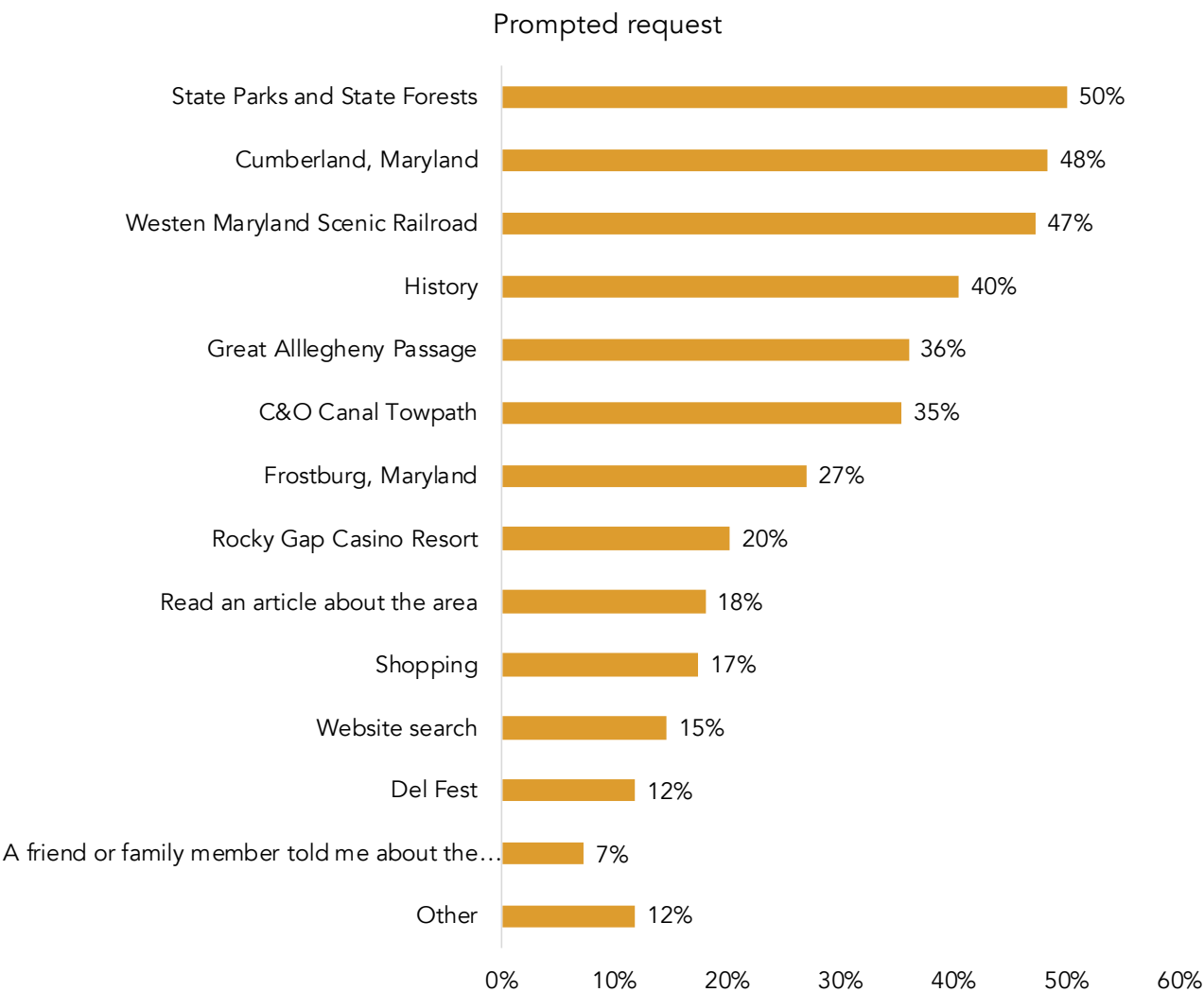
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IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Information Requested

State parks and forest, Cumberland, MD and the Western Maryland Scenic Railroad are the top areas that prompted an inquiry.



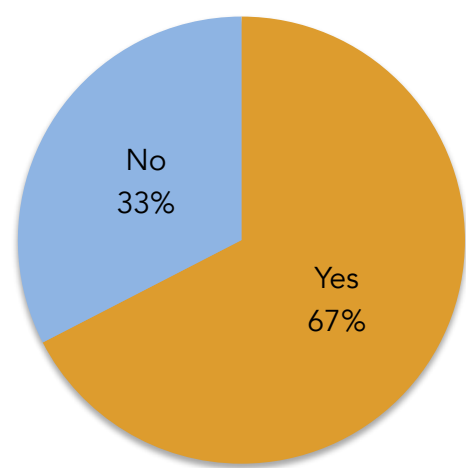
IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Conversion

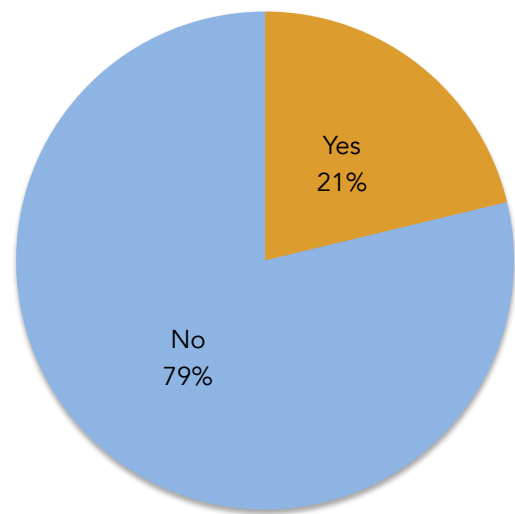
Two-thirds (67%) of the respondents have traveled to or through Allegany County since requesting information.

Traveled to or through Allegany County



Over three-quarters (79%) of visitors were repeat visitors. Twenty-one percent (21%) were first time visitors.

First trip

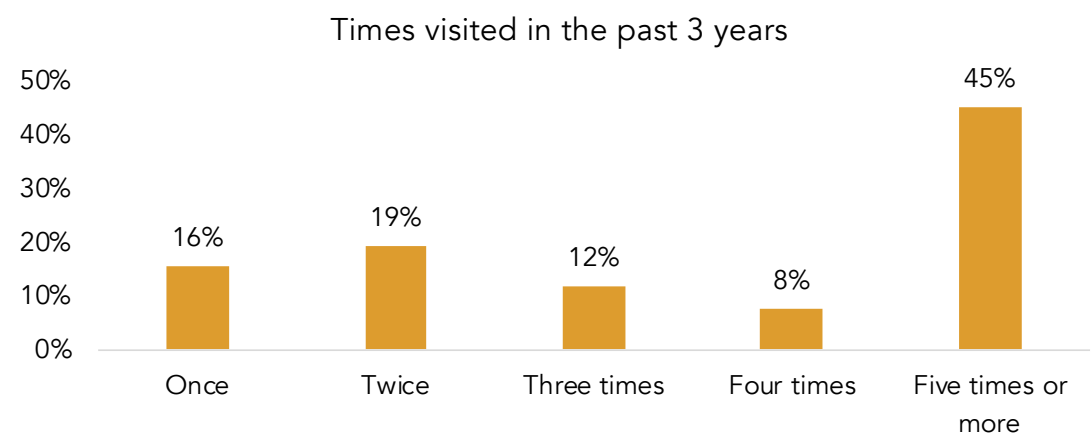


IMMERSION AND ASSESSMENT

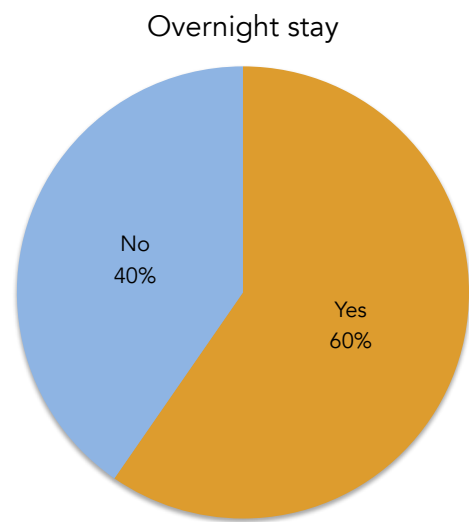
VISITOR PLANNING AND CONVERSION STUDY

Trip Attributes

Almost half (45%) of those who are repeat visitors to Allegany County have visited five or more times in the past 3 years. Thirty-five percent (35%) have visited one to two times and twenty percent (20%) three to four times.



Six in ten (60%) visitors stayed overnight while visiting Allegany County. Forty percent of visitors were day-trippers with no overnight stay.

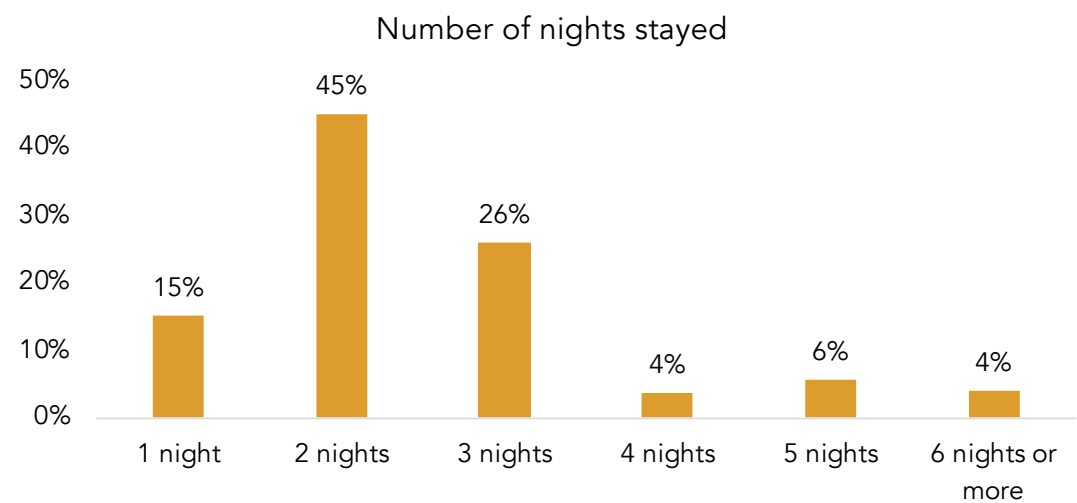


IMMERSION AND ASSESSMENT

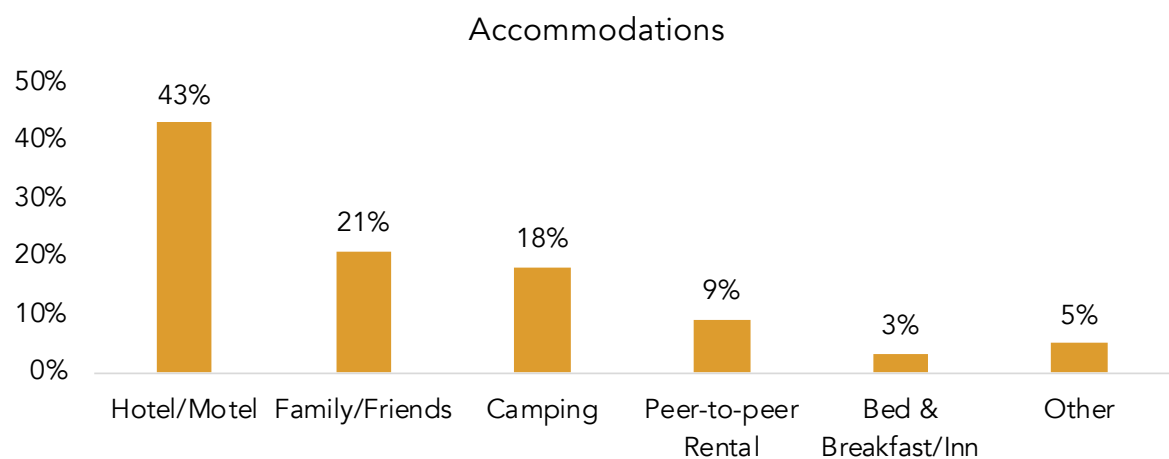
VISITOR PLANNING AND CONVERSION STUDY

Trip Attributes

Seventy-one percent (71%) of the overnight visitors stayed 2-3 nights in Allegany County.



Overnight visitors primarily stay in a hotel or motel while visiting Allegany County. It is worth noting that twenty-one percent (21%) stayed with family/friends and eighteen percent (18%) were camping.

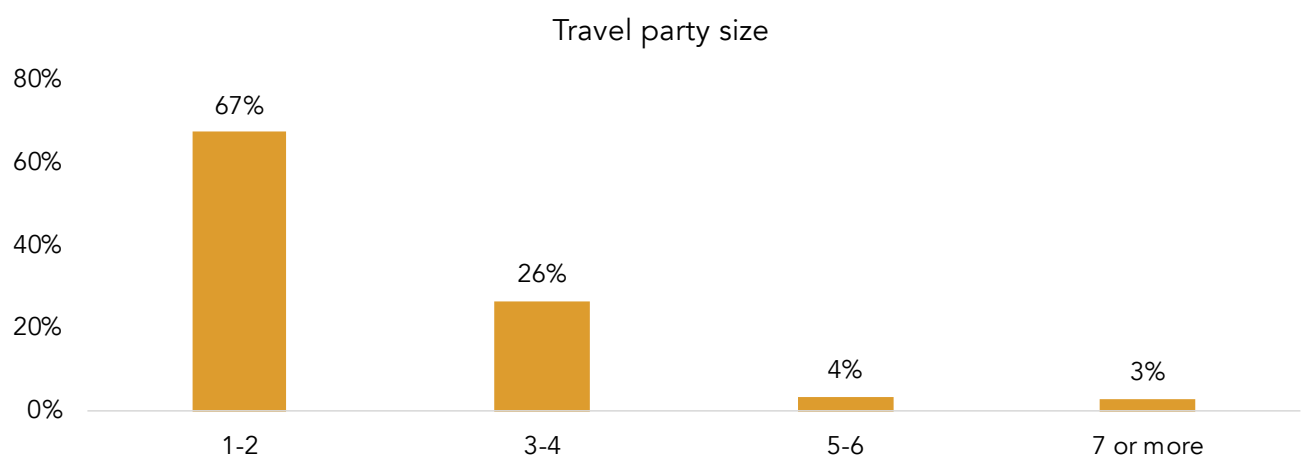


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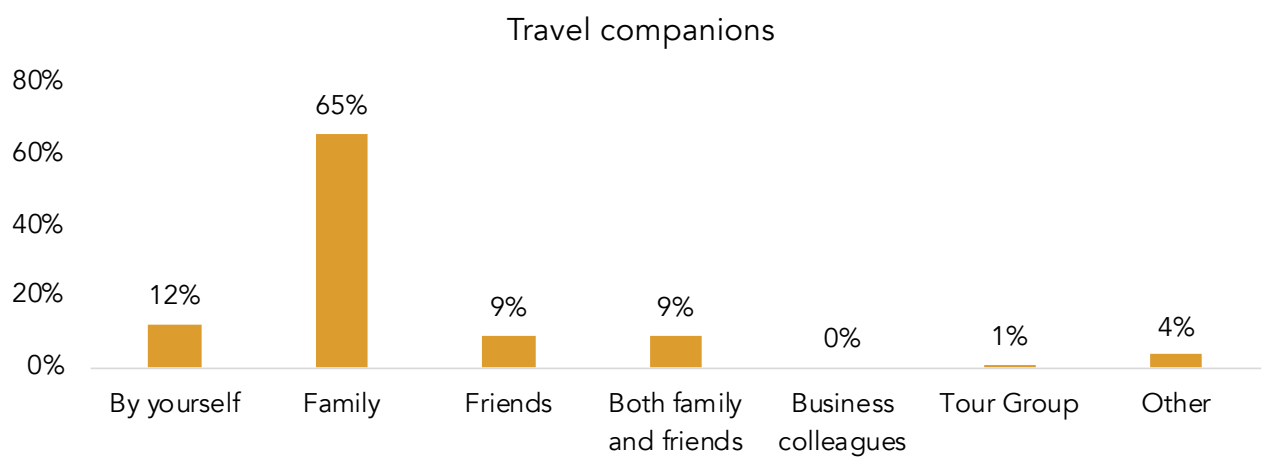
VISITOR PLANNING AND CONVERSION STUDY

Travel Party Composition

The Allegany party composition is primarily 1 to 2 people per travel party. One-quarter (27%) of respondents traveled with 3 to 4 people. Larger party sizes are minimal with those who have requested information.



Allegany visitors are far more likely to travel with family. Twelve percent (12%) traveled alone and nine percent (9%) travel with friends and both family and friends.

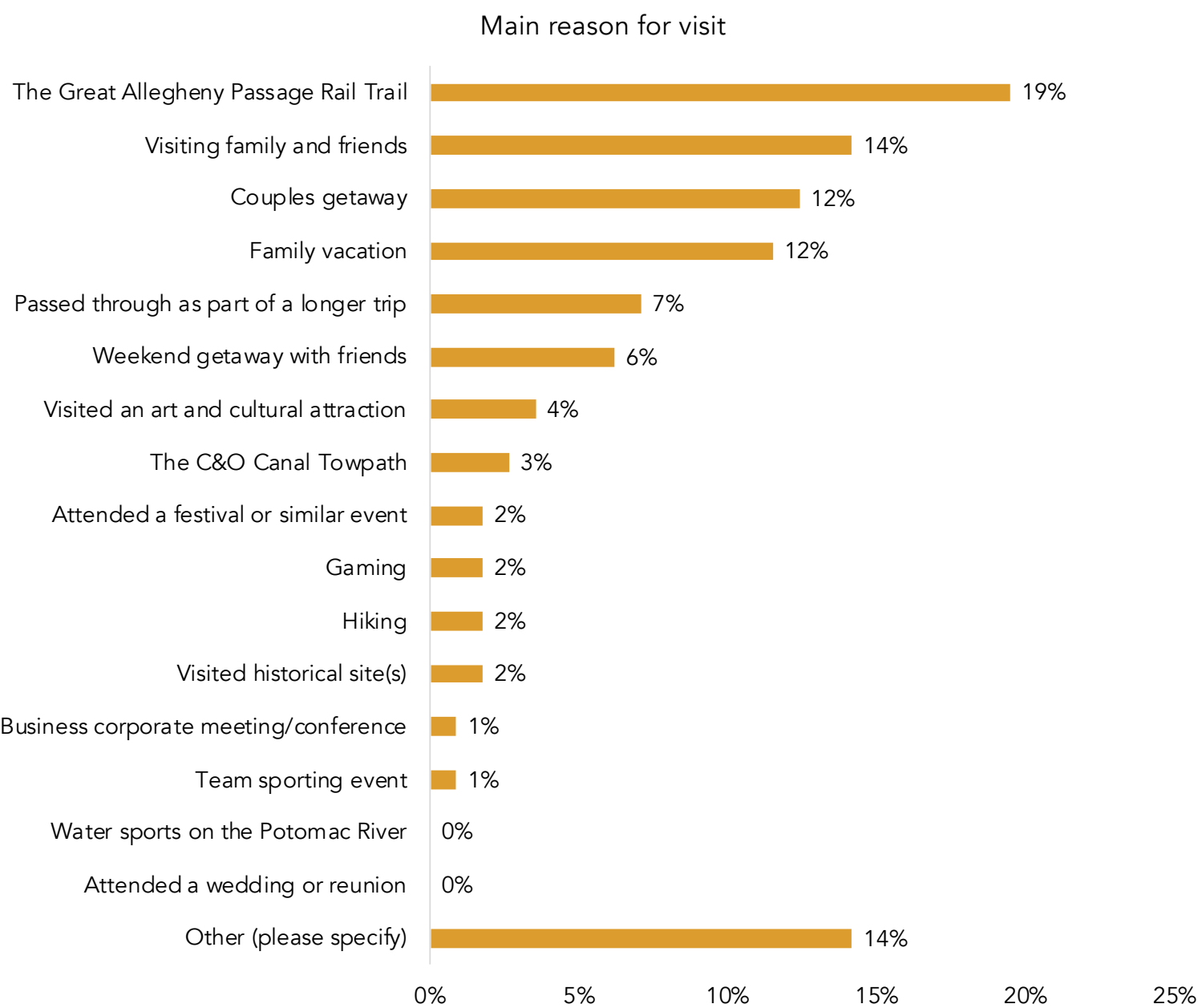


IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Trip Attributes

The Great Allegheny Passage Rail Trail (19%) is the top reason for visitation followed by visiting friends and family (14%), couples getaway (12%) and family vacation (12%).

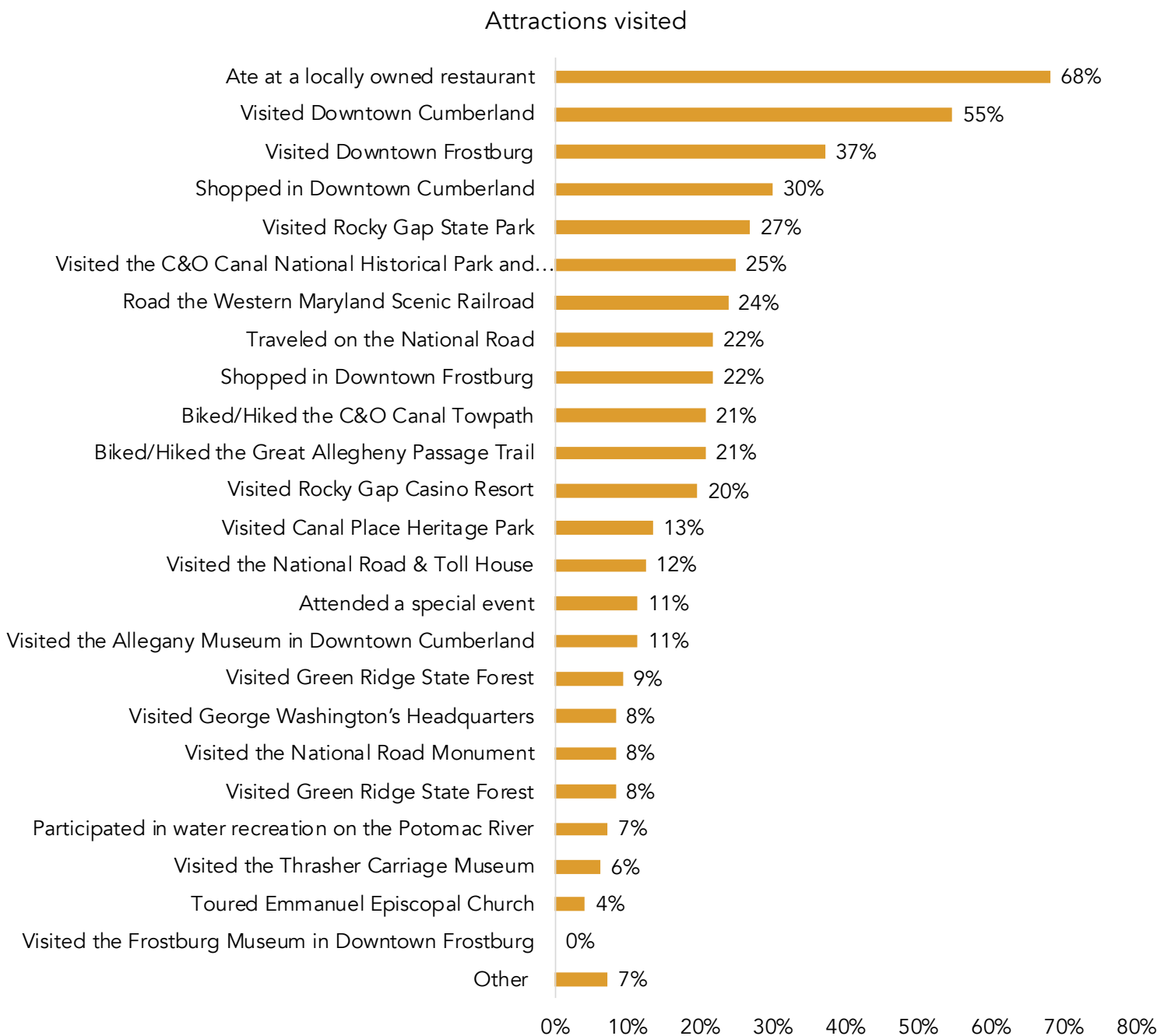


IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Trip Attributes

As expected, travelers to Allegany County eat at locally owned restaurants. They also visit and shop in the quaint downtowns of Cumberland and Frostburg. Allegany County has a lot to offer visitors including Rocky Gap State Park, the C&O Canal Historical Park, the Western Maryland Scenic Railroad, Rocky Gap Casino Resort, cycling the GAP Trail and the C&O Towpath Trail and driving the National Road.

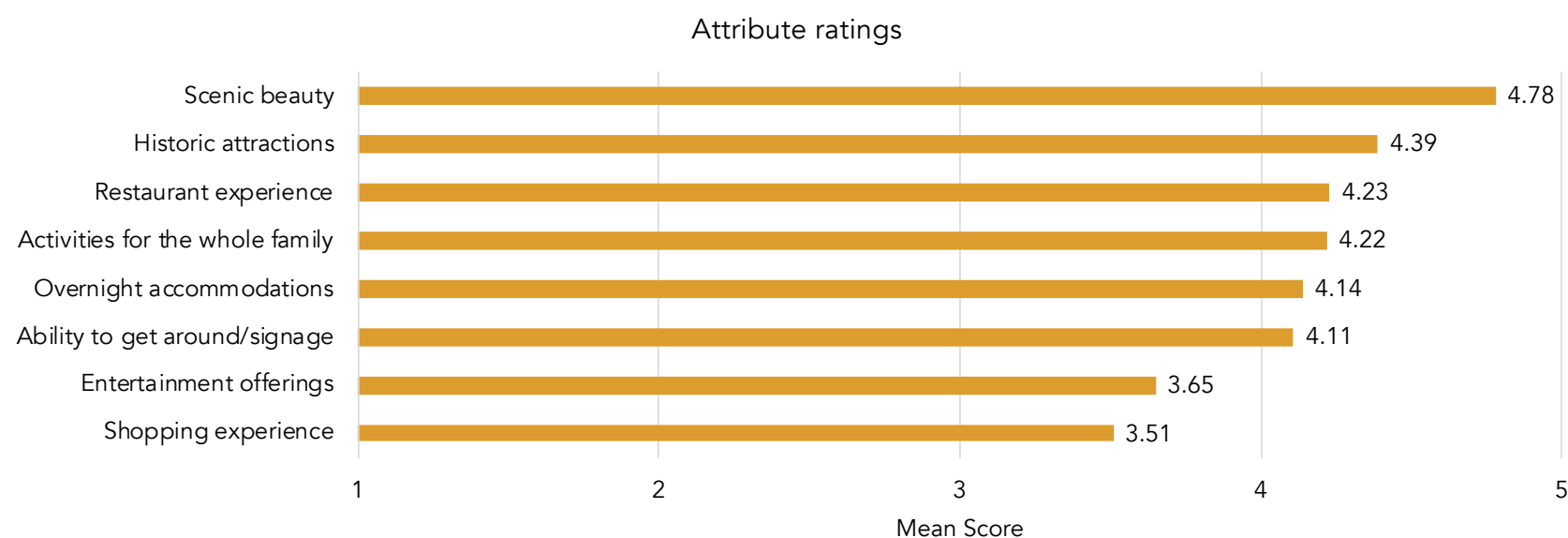


IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Trip Attributes

Visitors were asked to rate their recent experience in Allegany County on a scale of 1 to 5 with 1 being “poor” and 5 being “excellent.” Six of the eight attributes were rated above a 4.0 which is very encouraging. Scenic beauty was rated the highest at 4.78 followed by historic attractions (4.39) and restaurants experiences (4.23) and activities for the whole family (4.22). The two areas that have room for improvement are shopping experiences (3.51) and entertainment experiences (3.65).

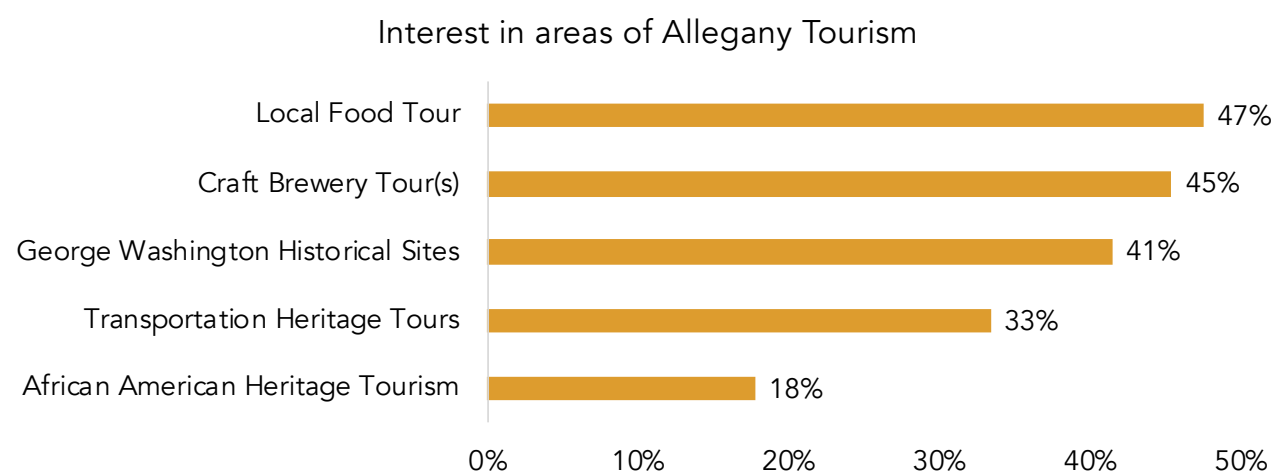


IMMERSION AND ASSESSMENT

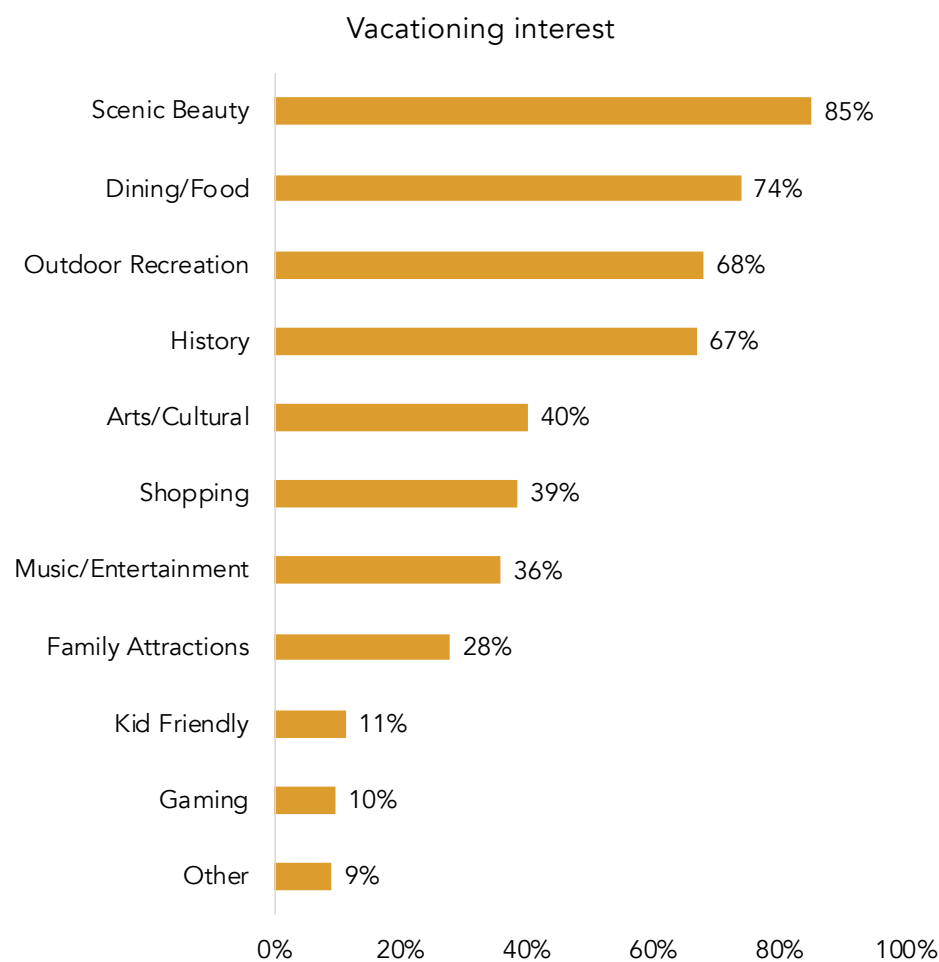
VISITOR PLANNING AND CONVERSION STUDY

Vacation Interest

Allegany County visitors are interested in a local food tour and craft brewery tours. The opportunity exists to expand African American heritage tourism. This area is significant because African American Heritage tourism is quickly becoming a sought after market.



Visitors interested in Allegany County say scenic beauty, dining/food, outdoor recreation and history are the top vacation interests.



IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Advance Travel Planning

Travel to Allegany County is planned in a relatively short window. Fifty-five percent (55%) planned travel less than 4 weeks before their visit. Of the fifty-five percent (55%), one-third (34%) planned their visit less than two weeks before their visit.

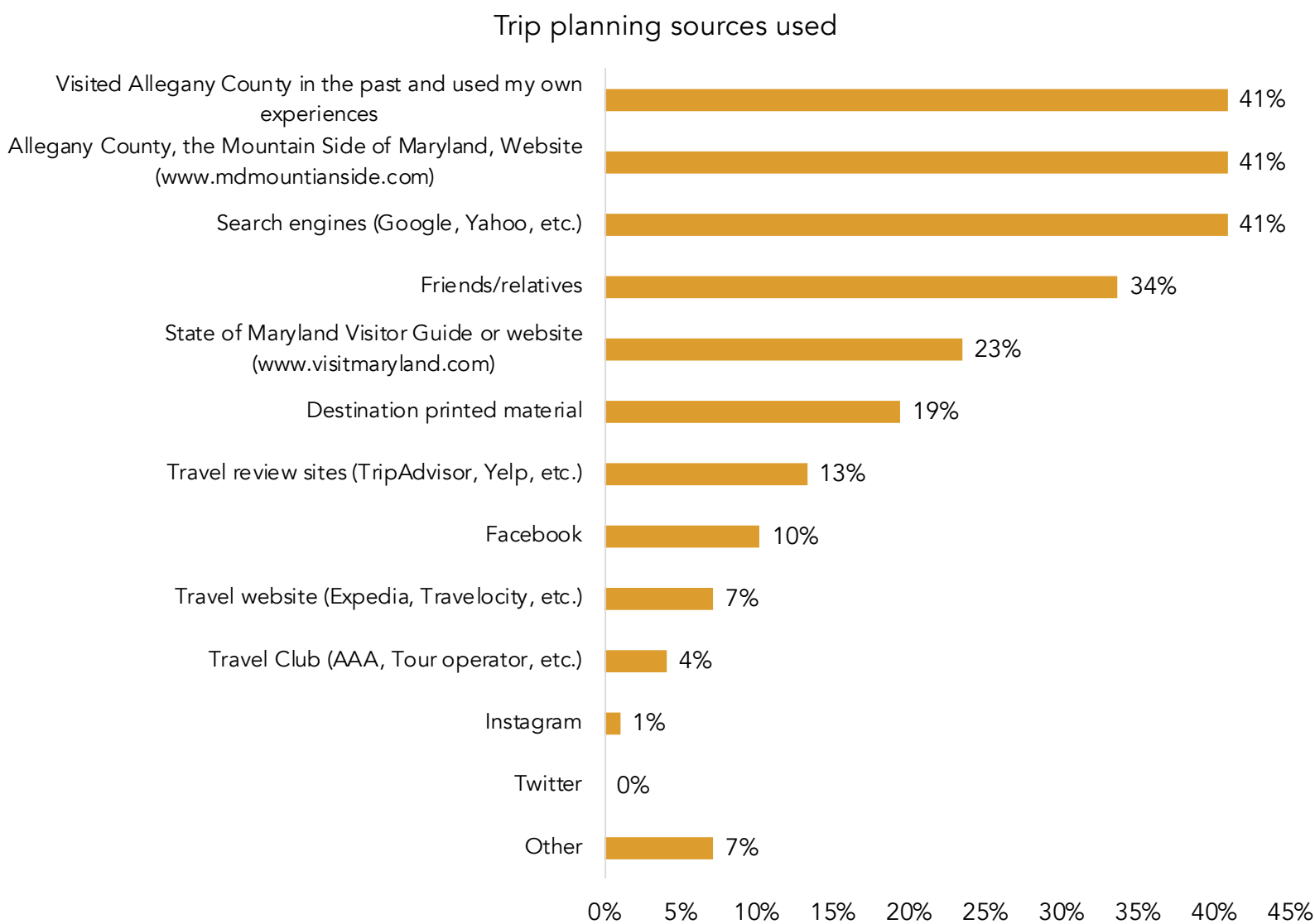


IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Planning Sources

The top two trip planning sources used by Allegany County visitors are past experiences (41%), the Allegany County, the Mountain Side of Maryland website (www.mdmountainside.com) and search engines (Google, Yahoo, etc.).










IMMERSION AND ASSESSMENT

VISITOR PLANNING AND CONVERSION STUDY

Demographics

Overall, the Allegany County visitors are caucasian, 45-74 years of age, married, with a two person household, and generally have a household income between \$100,000-\$150,000.

	Gender		Age	
	Female 62% Male 29%		18-24	0%
	Ethnicity		25-34	5%
	Caucasian 79% African American 1% Hispanic/Latino 1% Asian 1% Pacific Islander 0% American Indian 0% Other 3%		35-44	3%
	Household income		45-54	25%
	\$35,000 or less 5% \$35,000 - \$49,999 5% \$50,000 - \$74,999 20% \$75,000 - \$99,999 11% \$100,000 - \$149,99 21% Over of \$150,00 9%		55-64	24%
	Marital Status		65-74	3%
	Single 10% Married 70% Divorced 10% Widow/Widower 2%		Over 75	5%
			Household Size	
			One	16%
			Two	56%
			Three	8%
			Four	16%
			Five or more	3%
			Full-time Workers in HH	
			One	46%
			Two	44%
			Three or more	10%

ALLEGANY COUNTY INQUIRY LANDSCAPE



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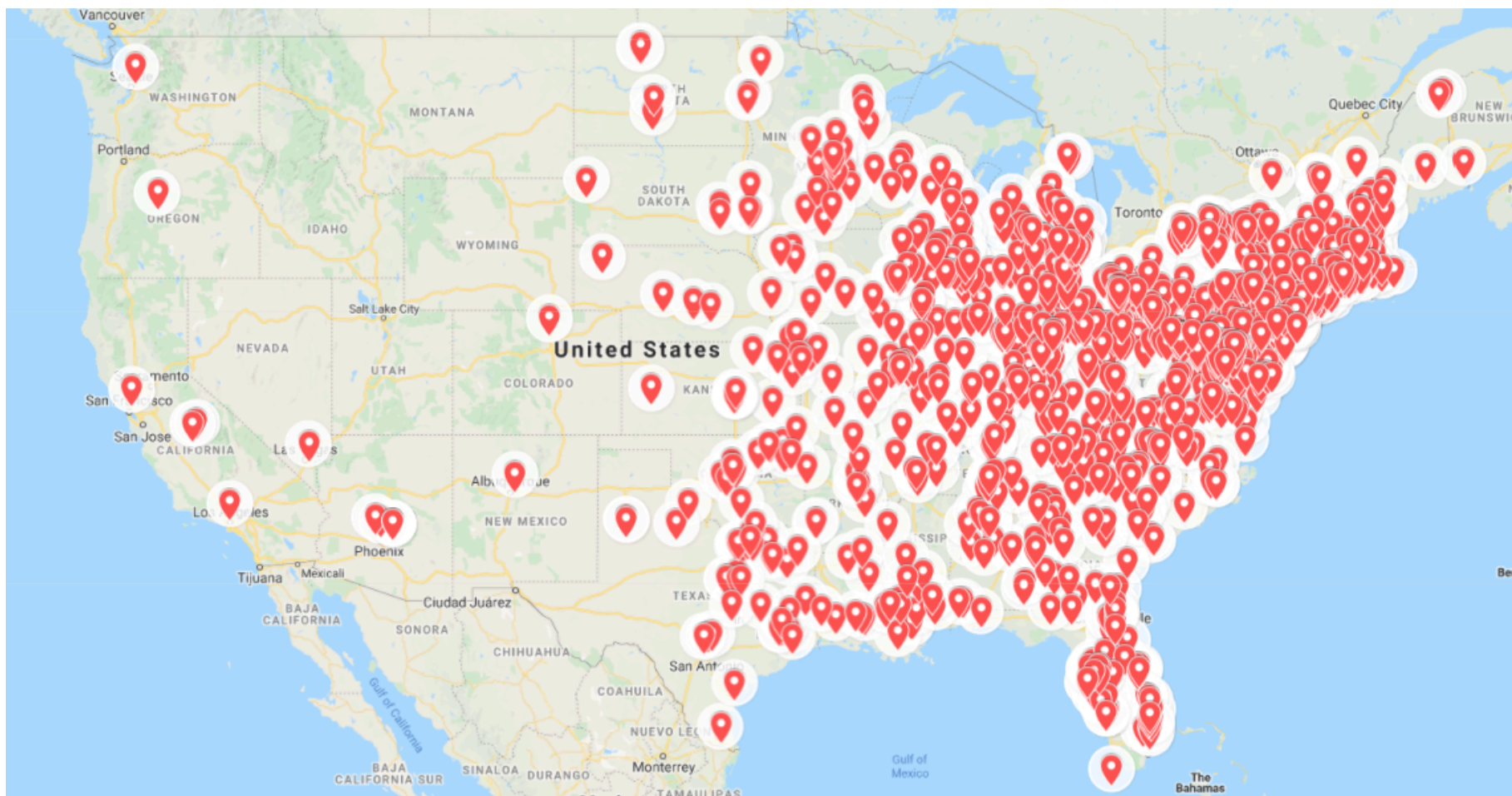
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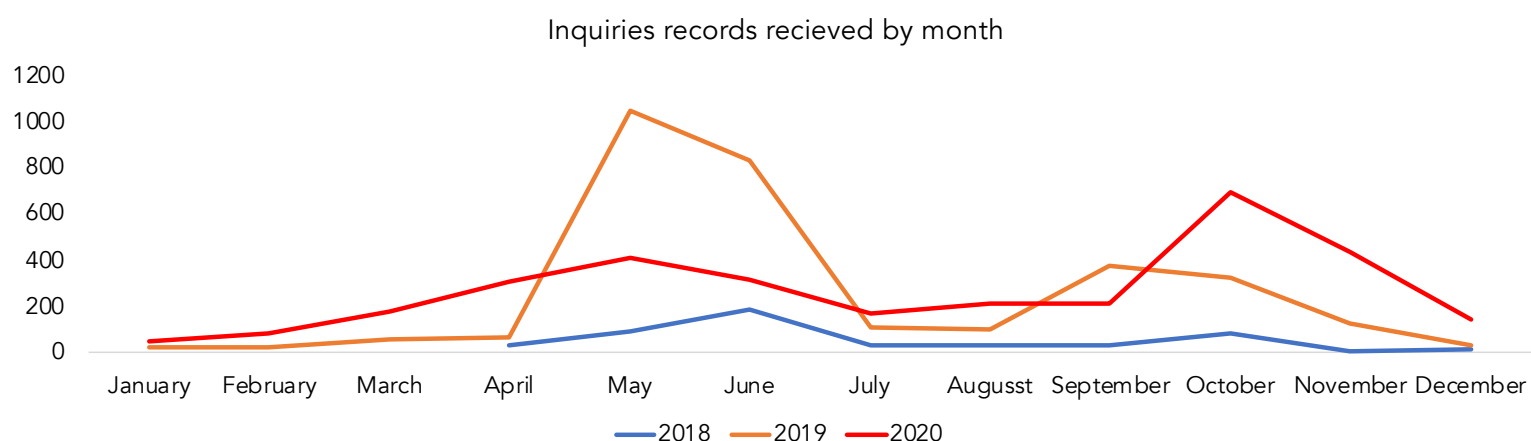
ALLEGANY COUNTY INQUIRY LANDSCAPE

Inquiry Map

Allegany County inquiries are primarily from the eastern half of the United States and primarily the northeast. The map below is based on the Allegany County inquiry records over the past 36 months.



When looking at inquiry records over the past 36 months, 2018 was relatively flat. There was growth in 2019 and 2020 especially in the months of May, June and October. May and June of 2019 saw a significant increase over previous years. The encouraging news is that In 2020, with the COVID-19 pandemic, Allegany County stayed consistent with previous years and saw an increase over previous years in October, November and December.



Source: Allegany County Tourism Inquiry Records 2018-2020

IMMERSION AND ASSESSMENT

ALLEGANY INQUIRY MARKETS

Allegany County Inquiry Market Analysis

Another important aspect of understanding your inquiry base is knowing where they live. If you have a specific location and you know where your visitors live, you get a better idea of how travel patterns, competitive locations, etc. may play a role in who comes to your location. Additionally, if you are interested in reaching your customers for a targeted marketing mail campaign, knowing where they live allows you to target your marketing message to specific geographic areas rather than distributing them across the entire market.

This report shows you the geographic areas and percentages where travelers who are interested in Allegany County are located, ranked top to bottom according to the numbers of visitors in each area. The state with the highest number of inquiries is Maryland (15%) followed by Pennsylvania (11%). When you look at other levels of geography, you find that the Baltimore, Maryland areas has the highest percentage of your inquiries.

The following geographic summary displays the top 20 states, counties, ZIP Codes and CBSAs in rank order

Top 20 States	Inquiry Count	Inquiry Percentage
Maryland	1060	15%
Pennsylvania	751	11%
New York	417	6%
Virginia	376	5%
Ohio	374	5%
Texas	327	5%
Florida	325	5%
New Jersey	318	5%
Illinois	238	3%
North Carolina	192	3%
Georgia	165	2%
Connecticut	164	2%
Michigan	159	2%
Kentucky	150	2%
West Virginia	150	2%
Tennessee	149	2%
Indiana	126	2%
Missouri	117	2%
Alabama	107	2%
Massachusetts	104	2%



IMMERSION AND ASSESSMENT

ALLEGANY INQUIRY MARKETS

Top 20 Markets	Inquiry Count	Inquiry Percentage
Baltimore, MD	120	1.74%
Pittsburgh, PA	51	0.74%
Silver Spring, MD	41	0.59%
Cumberland, MD	36	0.52%
Philadelphia, PA	33	0.48%
Cincinnati, OH	30	0.43%
Hagerstown, MD	28	0.41%
Frostburg, MD	27	0.39%
Jacksonville, FL	27	0.39%
Washington, DC	27	0.39%
Frederick, MD	26	0.38%
New York, NY	26	0.38%
Brooklyn, NY	24	0.35%
Chicago, IL	23	0.33%
Rockville, MD	23	0.33%
Gaithersburg, MD	22	0.32%
Louisville, KY	21	0.30%
Westminister, MD	20	0.29%
Youngstown, OH	20	0.29%
Arlington, VA	19	0.28%
Rochester, NY	19	0.28%



IMMERSION AND ASSESSMENT

ALLEGANY INQUIRY MARKETS

An analysis was conducted with Allegany County visitors by tracking their mobile device. The data for this analysis was collected during a digital campaign ran by Q1 Media in Austin, TX from July 29 through December 31, 2020. The data is collected electronically from cell phone location services that have been activated.

This analysis allows us to look at origin markets to Allegany County.

The top state of origin for Allegany County visitors during the digital promotion July through December are from Maryland. Pennsylvania and West Virginia were key markets as well. Washington, DC (Hagerstown, MD) was the top market for visitors.

Top 20 Markets	Visitor Percent
Maryland	28.93%
Pennsylvania	14.74%
West Virginia	11.69%
Virginia	7.41%
Ohio	6.31%
Kentucky	2.25%
Florida	2.15%
Texas	2.06%
Illinois	2.04%
Indiana	2.00%
North Carolina	1.69%
New Jersey	1.69%
New York	1.54%
Missouri	1.24%
Tennessee	1.20%
Georgia	1.12%
Wisconsin	0.85%
Michigan	0.82%
Deleware	0.79%
South Carolina	0.70%

Top 20 Markets	Visitor Percent
Washington, DC (Hagerstown, MD)	32.56%
Pittsburgh, PA	8.14%
Baltimore, MD	7.15%
Johnstown-Altoona, PA	3.81%
Philadelphia, PA	2.96%
Harrisburg-Lancaster-Lebanon-York, PA	2.45%
Columbus, OH	2.01%
New York, NY	2.01%
Charleston-Huntington, WV	1.64%
Clarksburg-Weston, WV	1.59%
Chicago, IL	1.35%
Cincinnati, OH	1.19%
Cleveland-Akron (Canton), OH	1.11%
Indianapolis, IN	1.05%
Wheeling, WV-Steubenville, OH	0.94%
Richmond-Petersburg, VA	0.81%
Lexington, KY	0.80%
Wilkes Barre-Scranton, PA	0.79%
Norfolk-Portsmouth-Newport News, VA	0.78%
Louisville, KY	0.77%

