Garrett County Branding Study
Welcome

Nicole Christian, Garrett County Chamber of Commerce
Our Agenda

• **Purpose & Overview of Project**: What We Set Out to Accomplish

• **Analysis & Assessment**: What We Learned

• **Artwork & Brand Messaging**: Our Brand Defined

• **Next Steps**: Implementation Phases Ahead

• **Audience Q&A**
Purpose & Overview of Project

• Define the go-to-market brand for Garrett County

• Develop a plan to leverage the brand to drive county economic development:
  • Increase tourism
  • Increase investment, development, and employment opportunities
  • Increase population
The Branding Advisory Team

- Nicole Christian, Garrett County Chamber of Commerce
- Leigh Clarke, Chanteclaire Farm
- Jonathon Smiley Kessler, Pine Lodge, Fun Zone
- Mike Koch, Garrett County Economic Development
- Clint McCabe, Clear Mountain Bank
- Emily Newman-Edwards, Savage River Lodge
- Frank Shap, Garrett County Economic Development
- Laura Stutzman, Eloqui
- Mark Stutzman, Eloqui
- Paula Yudelevit, HART for Animals, MarketWorks LLC
Our Challenges: A Balancing Act

- Reflect our "culture"
- Be credible
- Move Fast
- Dazzle
- Attract a diverse economy
- Be aspirational
- Maintain Alignment
- Discipline
Challenges: The Toughest Balancing Act

*From the start, we’ve known we needed to balance our efforts to leverage the considerable brand equity in Deep Creek Lake with our imperative to cast a larger, more inclusive brand that would unite the county -- perhaps the region.*
Challenges:
The Toughest Balancing Act

How do you enlarge the brand without diluting it?

How do you leverage the equity in Deep Creek without excluding non-Lake business and residents?
Analysis & Assessment: What We Learned

Mike Koch, Garrett County Economic Development
Analysis: Research Objectives

• Determine the existing attitudes and perceptions of the County.
• Identify existing brand challenges & differentiators.
• Delve into the targets’ feelings, emotions, and attitudes about Garrett County and our region.
Analysis: Research Methodology

• Secondary Research
  • WVU Tourism Study, 2009/2010

• Primary Qualitative Research
  • 1:1 Interviews – formal and informal -- among “Brand Advocates”
  • Focus Groups among “Next Gen Brand targets”

• Primary Quantitative Research
  • Extensive, custom on-line survey fielded in January 2013 to county visitors, residents, and second home owners
Analysis: Qualitative Research Findings

• Brand Advocates are strong supporters of the county and our region. They are supporters and frequent users of its recreational attributes.

• Brand Advocates are likely to recommend Garrett County as a vacation destination: an overall measure of 4.06

• Brand Advocates were unanimous in citing the county’s natural beauty and the variety of outdoor activities

• However, Next Gen Brand Targets do not share this satisfaction:

  “There’s nothing to do here,” the county activities are “Not for me.”
Analysis: Qualitative Research Findings

• However, Brand Advocates were less likely to recommend Garrett County as a place of residence: An overall measure of 3.33

• Brand advocates cited both strengths and weaknesses in their explanations:
  **Strengths:** Closeness of community; low crime; quality of living
  **Weakness:** No strategy; no jobs; no growth; harsh winters

• Next Gen Brand Targets were similarly neutral-to-negative regarding their willingness to recommend:

• Antipathy expressed by county natives:
  “I want to stay; but I’ll have to leave to make a living.”
Analysis: Qualitative Research Findings

• When asked about county challenges, both Brand Advocates and Next Gen Brand Targets alluded, directly and indirectly, to existing county divisions:
  • Between “Lake Tourons” and county residents
  • Between residents in north and residents in south
  • Between long-term residents and more recent arrivals
  • Between “lake” oriented businesses community and the non-lake oriented business community

• Both groups also repeatedly mentioned “aversion and reluctance to change” and the notion of being “stuck.”
Analysis: Qualitative Research Findings

• When asked about county differentiators:
  • Brand Advocates cited the county’s natural and scenic beauty, variety of outdoor activities, and community spirit and support.
  • Next Gen Brand Targets also cited scenic beauty and variety of outdoor activities as major county differentiators.
Analysis: Quantitative Research Findings

- A custom, quantitative survey was fielded in January 2013
- A chance to win one of five $100 VISA Gift Cards was offered as an incentive to stimulate responses
- 2,243 responses were collected over a two-week period
- 85 survey questions:
  - Frequency, length & depth of county relationship
  - Variety, frequency, satisfaction level, and drivers of dis-satisfaction with available county activities; relative importance of activities
  - Most strongly associated county descriptors and physical attributes
  - Household configuration and demographic information
  - Numerous opportunities for free-form verbatim responses
Analysis: Quantitative Research Findings

Q1 Are you a full-time resident in Garrett County?

- **Yes**: 229 Respondents (10.21%)
- **No**: 2,013 Respondents (89.79%)

84.72% of Residents had lived in the county more than 5 years or were born there.

Q3 Do you own a second home or vacation property in Garrett County?

- **Yes**: 322 Respondents (14.38%)
- **No**: 1,918 Respondents (85.63%)

32.62% of second home owners derive rental income from the property.

- Visitation frequency is high, 17.83% visit at least weekly; an additional 51.91% at least monthly; and additional 22.61% at least once a season.

- 75.16% travel more than two hours each way.

“It’s all about connection - between people in the place and people with the place.”
Analysis: Quantitative Research Findings

- A full three-quarters of respondents come here most frequently to rest and dine.
- Respondents more frequently go hiking than boating.
- Respondents more frequently go fishing than skiing, bicycling, rafting/kayaking, or golfing.

“We must strike a fine balance: outdoor adventure sports epicenter AND a place to rest and unplug...”
### Analysis: Quantitative Research Findings

#### Q65 Garrett County offers a wide variety of outdoor activities. On a scale of 1 - 10 with 10 being most important, how important is this to you?

<table>
<thead>
<tr>
<th></th>
<th>1 - Not Important</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10 - Most Important</th>
<th>Total</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor activities</td>
<td>0.99% 21</td>
<td>0.66% 14</td>
<td>0.85% 18</td>
<td>1.08% 23</td>
<td>5.05% 107</td>
<td>5.14% 109</td>
<td>13.30% 282</td>
<td>23.54% 499</td>
<td>20.61% 437</td>
<td>28.77% 610</td>
<td>2,120</td>
<td>8.20</td>
</tr>
</tbody>
</table>

#### Q66 Garrett County is a place where folks often unplug and rest. On a scale of 1 - 10 with 10 being most important, how important is this to you?

<table>
<thead>
<tr>
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<th>1 - Not Important</th>
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<th>7</th>
<th>8</th>
<th>9</th>
<th>10 - Most Important</th>
<th>Total</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quiet rest &amp; relaxation</td>
<td>1.04% 22</td>
<td>0.33% 7</td>
<td>0.71% 15</td>
<td>0.80% 17</td>
<td>3.54% 75</td>
<td>4.06% 86</td>
<td>7.31% 155</td>
<td>19.21% 407</td>
<td>21.52% 456</td>
<td>41.48% 879</td>
<td>2,119</td>
<td>8.62</td>
</tr>
</tbody>
</table>

“And, quiet rest wins by a nose...”
Analysis: Quantitative Research Findings

Which adjectives best describe Garrett County?

- **Beautiful**: 64.06%
- **Relaxing**: 61.64%
- **Picturesque**: 53.34%
- **Natural**: 46.28%

"Beautiful, Relaxing, Picturesque, Natural, Restful..."
Analysis: Quantitative Research Findings

We are perceived as:

<table>
<thead>
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<td>Beautiful</td>
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<td>Picturesque</td>
<td>53.34%</td>
</tr>
<tr>
<td>Natural</td>
<td>46.28%</td>
</tr>
<tr>
<td>Restful</td>
<td>39.45%</td>
</tr>
<tr>
<td>Family-oriented</td>
<td>38.79%</td>
</tr>
<tr>
<td>Friendly</td>
<td>37.55%</td>
</tr>
</tbody>
</table>

We are not perceived as:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diverse</td>
<td>5.22%</td>
</tr>
<tr>
<td>Under-developed</td>
<td>4.79%</td>
</tr>
<tr>
<td>Crowded</td>
<td>3.94%</td>
</tr>
<tr>
<td>Backward</td>
<td>2.04%</td>
</tr>
<tr>
<td>Creative</td>
<td>1.75%</td>
</tr>
<tr>
<td>Boring</td>
<td>1.56%</td>
</tr>
<tr>
<td>Innovative</td>
<td>0.62%</td>
</tr>
</tbody>
</table>
Which physical attributes best describe Garrett County?

“Deep Creek Lake, Natural Beauty, Mountains, Quiet & Tranquility, State Parks...”
### Analysis: Quantitative Research Findings

We are associated with these attributes:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deep Creek Lake</td>
<td>72.26%</td>
</tr>
<tr>
<td>Its natural beauty</td>
<td>55.80%</td>
</tr>
<tr>
<td>The Mountains</td>
<td>49.67%</td>
</tr>
<tr>
<td>Its quiet and tranquility</td>
<td>37.87%</td>
</tr>
<tr>
<td>Its State Parks</td>
<td>30.83%</td>
</tr>
<tr>
<td>Its panoramic views</td>
<td>29.64%</td>
</tr>
<tr>
<td>Its four seasons</td>
<td>26.69%</td>
</tr>
</tbody>
</table>

We are not associated with these attributes:

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<tr>
<td>Its ski trails</td>
<td>10.13%</td>
</tr>
<tr>
<td>Environment connection</td>
<td>8.28%</td>
</tr>
<tr>
<td>Its farms and barns</td>
<td>8.23%</td>
</tr>
<tr>
<td>Its safety</td>
<td>5.90%</td>
</tr>
<tr>
<td>Its nightlife options</td>
<td>2.00%</td>
</tr>
<tr>
<td>Its fields</td>
<td>1.86%</td>
</tr>
<tr>
<td>Its amusement centers</td>
<td>1.52%</td>
</tr>
<tr>
<td>Its distinctive architecture</td>
<td>0.81%</td>
</tr>
</tbody>
</table>
Analysis: Quantitative Research Findings

- 94.10% of Respondents are somewhat or very likely to recommend Garrett County as a vacation destination.

- When asked why, 884 respondents left detailed free-form responses.

“I have loved Deep Creek all of my life. I have traveled all over the world, and Garrett County is my favorite. It feels like home!”

Ability Beautiful Close to DC Close to Home
Deep Creek Lake Enjoy Expensive Family
Oriented Far Four Seasons Friends Garrett
County Kids Laid Love Options Outdoor
Activities Place Proximity Reasonable
Analysis: Quantitative Research Findings

- **77.00%** of Respondents are **not** very likely to recommend as a place of permanent residence.

- When asked why, **870 respondents** left detailed free-form responses.

> “Too cold & too much snow to live there full time, limited economic development opportunities & not enough shops, restaurants, cultural activities, etc.”

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**Q72 How likely is it you would recommend Garrett County as a place of full-time residence to a friend or colleague?**

- **Very likely**: 23.00%
- **Somewhat likely**: 25.29%
- **Neutral**: 33.86%
- **Somewhat unlikely**: 9.62%
- **Unlikely**: 8.24%

Answered: 2,100   Skipped: 143
Analysis: Quantitative Research Findings

- 69.64% of Respondents do not believe Garrett County is a good place to start a business.

- When asked why, 820 respondents left detailed free-form responses.

“Garrett County does not attract enough people, residents, or customers for a business owner to start a business.”
Our creative exploration has taken us across the continuum. The data gave us clear and definitive guidance.

“Sometimes you have to see what won’t work before you understand what will work.”
Summing It Up

Our Brand is rooted in “Deep Creek”
Summing It Up

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• 72.26% of Respondents MOST strongly associate Garrett County with Deep Creek Lake as a physical attribute.

• There is considerable “brand equity” in Deep Creek that we are compelled to consider; equity that can and should be leveraged by all residents and businesses.
Summing It Up

**Our Brand is rooted in “Deep Creek”**

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**Deep Creek communicates geographic location that is regional as well as specific; our brand must be “more than the lake,” unbound from the physical...**
Summing It Up

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- 72.26% of Respondents MOST strongly associate Garrett County with Deep Creek Lake as a physical attribute.
- There is considerable “equity” in Deep Creek that we are compelled to consider; equity that can and should be leverage by all residents and businesses.

Deep Creek communicates geographic location that is regional as well as specific; our brand must be “more than the lake,” unbound from the physical...

- A full three-quarters of respondents come here most frequently to rest and dine; respondents more frequently go hiking than boating.
- Garrett County is unknown and has no equity (can we name a branded county?)
- Western Maryland is Frederick; Mountain Maryland is ambiguous and uninspiring.
What Influenced Us?
What Influenced Us?
What Influenced Us?
What Influenced Us?
What Influenced Us?

Welcome to the Wild Side
What Influenced Us?

What happens in Vegas, stays in Vegas.
What Influenced Us?

ASHEVILLE
any way you like it®
What Influenced Us?
Results

“The Deep Creek Experience”
It’s Our Time To Shine! think how this brand will work for you

The Deep Creek Experience
Garrett County, MD

Authentic Branding