

Appendix A

MARKET ANALYSIS

Forward

Marketing Overview

There have been several important factors put into play with relation to the tourism market in the last ten years. The impact of 9/11 in 2001 was one factor, reflecting in low visitor numbers to the Museum for several years. The Geronimo Springs Museum participated in a state-wide survey in 2005 to determine recovery effects since 9/11. Results of this survey indicated that recovery was just starting to be seen in 2005.

Another important factor has been the increased participation in Internet use. Visitors can now search the World Wide Web for vacation destinations, study the community profiles of an area, book reservations online and even take e-tours of interesting destinations. The Internet has increased the visibility of the Geronimo Trail National Scenic Byway through links to the National Byways Website and through many local and state websites as well. The challenge now is to make sure information about the GTNSB is kept up-to-date with the continuous growth in Sierra County.

A third factor influencing tourism is that Southern New Mexico is now on the radar, not only as a hot tourist destination but also as an exceptional place to live. This can be attributed to increased Internet usage as well as to increased media interest by well known magazines and newspapers. The Sierra County Recreation and Tourism Advisory Committee has been working diligently since its beginning in 2004 to make sure that Sierra County is well represented at trade shows and that its website is kept current with visitor information. The GTNSB is linked to this website and has reaped the benefits.

The goals of the Geronimo Trail Advisory Board is to continue expanding their levels of domestic and international tourism and to improve their visitor tracking tools in order to have more comprehensive local data.

Marketing Partnerships

Since 1997, partnerships within the community toward tourism has grown stronger. The Rural Economic Development Through Tourism (REDTT) Board brought together many important players to focus specifically on marketing Sierra County. Event planners, organizational leaders, business owners and government representatives sat at the same table each month to discuss marketing tools; to schedule familiarization (FAM) tours and develop plans for better supporting the tourist trade. The GTNSB grew from the relationships

formed in REDTT. Many FAM Tours were conducted to educate local businesses and the media about the Byway. REDTT dissolved in 2005. The Sierra County Recreation & Tourism Advisory Committee is made up of those who participated in REDTT plus more representatives from communities along the Byway and these partnerships are helping to strengthen the tourist trade.

Product Development

Increasing expenditures by visitors to the GTNSB communities is an important goal of the Corridor Management Plan. Developing products to encourage tourists to stay awhile and spend money is also an important goal of the Sierra County Recreation & Tourism Advisory Committee. Such products might include:

- Tour Packages
- Hotel room discounts
- Discounted meals
- Package including hot baths
- Retail Goods
- Coupon Books
- Attraction Entrance Fees
- Car Rentals
- Transportation Tickets – air, train, etc.

Access to the Internet can provide potential visitors more ease in planning their trip and buying into some of these products, thus ensuring their visit and alerting businesses along the Byway of incoming tourists and their spending potential.

Executive Summary

The following summary was based on findings taken from the TravelScope study for New Mexico Visitors in 2005.

State of Origin

- The leading state of origin was New Mexico, accounting for 70.7% of day trips and 35.6% of overnights.
- New Mexicans made up 58.2% of visitors who drove, 53.3% of leisure visitors and 59.1% of business travelers.

The GTNSB may create a business product that would encourage business travelers to stay in Sierra County and take time to visit the GTNSB.

- The top state for visitors who fly to New Mexico is California

Transportation

- 86% of all trips were taken in a car/truck/RV. *As most visitors to NM are driving a private and/or recreational vehicle, a drive along the GTNSB is a definite vacation choice.*
- 12.8% of out of state trips and 13.3% of business trips were taken by airplane.

As gas prices continue to climb and if the economy declines, visitors from out-of-state may rethink their vacation destination and stay closer to home. The GTNSB may see more in-state visitors than out-of-state visitors in the future.

Party Size

- Average party size was 2.1 persons
- 45.5% of overnight trips consisted of 2 persons, and another 36.8% consisted of 1 person.

Accommodations

- 57.2% of overnight visitors stayed in hotels, 26.8% stayed in private homes or condos and 7.1% camped or stayed in an RV.

The GTNSB would benefit by marketing products that include hotel discounts and /or discount meals, baths and retail products available in communities along the Byway.

Trip Activities

- For overnight visitors, the most common trip activities were touring / sightseeing, shopping, nature/ culture, historic sites, museums or art exhibits and national or state parks.
- Day-trippers were most likely to shop and attend festivals or craft fairs.

All of these most common activities for overnight visitors and for day trippers can be done along the GTNSB.

Trip Purpose

- The most common trip purpose for overnight visitors was to visit friends or relatives (30.8%)
- 20.6% of those surveyed were taking a vacation and 19.7% were visiting for other leisure purposes.

Demographics

- Average age of head-of-household was 55.8 years old.
- 31.7% of visitors had a child present in the household
- Average income was \$58.930, slightly higher than the national average for all travelers.
- 19.9% of overnight visitors and 17.5% out of state visitors were retired.
- 26.2% of New Mexico visitors were Hispanic.

Baby boomers and their children are the primary travelers visiting the GTNSB. Marketing to both the maturing audience and to their families is important. The retiree audience will be making a comeback in the near future with different expectations for accommodations and entertainment. The GTNSB needs to keep these factors in mind.

Geronimo Springs Museum Visitors

Visitors to Geronimo Springs Museum and Geronimo Trail Information & Visitor Center pick up brochures and learn about the GTNSB. They often become the visitors to communities along the GTNSB. The following numbers show the total number of visitors in a year and reflect a 38% increase in visitors since 9/11.

Year	Total Visitors
2002	4096
2003	4844
2004	5436
2005	7126
2006	8775
2007	8589

The following chart shows the number of visitors to the Geronimo Springs Museum from New Mexico, from Out-of-State (OS) and from a Foreign Country (FC) during the months of May 2007 to March 2008. These numbers also reflect those who Did Not Say (DNS) where they were from.

Corridor Management Plan 2008
Geronimo Trail National Scenic Byway

MONTH	NM	OS	FC	DNS	TOTAL
MAY 2007	261	328	28	202	819
JUN 2007	210	309	15	192	726
JUL 2007	201	304	32	115	652
AUG 2007	198	232	38	164	632
SEP 2007	222	323	37	139	721
OCT 2007	208	448	56	208	763
NOV 2007	193	283	57	39	572
DEC 2007	162	275	31	27	495
JAN 2008	231	325	55	42	653
FEB 2008	248	394	55	137	834
MAR 2008	345	524	54	50	973

Most out-of-state visitors were consistently from New Mexico's boarder states of Texas, Arizona, California and Colorado. Canada showed the highest foreign visitor numbers during this period of time.