

# Stakeholder Views of the Maryland Heritage Areas Program

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# Introduction

- As a member of the National Trust for Historic Preservation consulting team, DPA conducted work sessions in four locations in Maryland with heritage area stakeholders.
- Following the sessions, DPA prepared a questionnaire to identify the views of heritage area stakeholders from the 11 heritage areas across the state.
- This report presents the findings from an online survey among stakeholders.

## Research Objectives

- To learn how successful stakeholders feel the Maryland Heritage Areas Authority Program has been during its first ten years;
- To examine the benefits and drawbacks of the heritage area for the stakeholders' communities and what they regard as most important to the success of the program;
- To understand how well stakeholders feel the goals of the program have been met;
- To explore what views stakeholders have of the future of the program and MD HAA's role in that future; and
- To see where stakeholders would like their heritage area to be 10 years in the future.

## What Was Done

- Each heritage area director was asked to provide us with a list of stakeholders, including email contact information.
- All 400 stakeholders were emailed by the MD HAA requesting their cooperation in completing an online survey by DPA.
- DPA sent invitations and the link to an online survey on September 8, 2008.
- Two reminders were sent to those who had not responded.
- By September 22, 2008, 116 stakeholders had completed the questionnaire, a response rate of 29%. That rate is quite high for an online survey. The results reported here are based on those 116 interviews.

## What We'll Cover

### Executive Summary

- A. Who are the stakeholders and how do they feel about their heritage area?
- B. What benefits and drawbacks have heritage areas brought to their communities?
- C. What's important to the success of the heritage areas?
- D. How important are the program goals and how well have they been achieved?
- E. What is on the stakeholders' wish lists?
- F. Where would stakeholders want their heritage area to be 10 years from now?
- G. What do stakeholders feel the MD HAA should do in the future?

# Executive Summary

- Nearly all stakeholders see preservation of historic sites as critical to the success of heritage areas. Preservation of cultural traditions and conservation of natural resources are included by a large majority of stakeholders.
- The vast majority also feel maps and brochures and wayfinding signage are important to the success of their heritage area. Almost as many want signage to mark the presence of the heritage area.

- Most stakeholders are anxious to have good interaction opportunities with their peers and feel that the management entity facilitates that interaction.
- Marketing and local outreach are important to most stakeholders in a successful heritage area as are the themes which support their work.

- The tourists' needs -- accommodations, retail stores and restaurants with a local flavor -- are important to fewer stakeholders.
- Yet, most stakeholders want tourists to come and spend money to create economic benefits for their communities.

- Stakeholders are comfortable with the management entity for their heritage areas. Most feel their management entities support networking, have the support of local governments, use the management plan to guide area development, and are inclusive and diverse in membership.

- Stakeholders definitely want the state operating grants to continue, fearing their management entity will disappear without them.
- Eight in ten want both the MHAA and the Office of Tourism Development to spend more time and dollars on marketing Maryland's cultural/heritage tourism. Two-thirds would like to have grant funds available to heritage attractions for marketing their sites.

- To review –
  - Historic preservation is key to virtually all stakeholders.
  - Stakeholders want desperately to keep the operating grants and therefore their management entity.
  - Stakeholders want more state dollars from both Office of Tourism Development and MHAA to be spent on marketing heritage areas and grant money released for site marketing.
  - Tourists' needs are not such a high priority as local marketing and outreach in stakeholder communities.



# The Findings in Detail

## Stakeholder Views of the MD Heritage Areas Program

### A. Who are the stakeholders and how do they feel about their heritage area?

- **The stakeholders include representatives of all 11 of the heritage areas.**

<b>Eastern Shore</b>	<b>28%</b>
Heart of the Chesapeake	11
Stories of the Chesapeake	10
Lower Eastern Shore	6
<b>Metropolitan Heritage Areas</b>	<b>23%</b>
Annapolis, London Town, South County	14
Baltimore	9
<b>Suburban Washington, DC</b>	<b>18%</b>
Montgomery County	12
Anacostia Trails	6
<b>Western Maryland</b>	<b>17%</b>
Heart of the Civil War	11
Canal Place	6
<b>Rural</b>	<b>14%</b>
Lower Susquehanna Greenway	8
Southern Maryland	6

### A. Who are the stakeholders and how do they feel about their heritage area?

- Half of the stakeholders are directly connected to the heritage area (47%), either as board members (37%) or director/staff (9%).
- One-third of the stakeholders are from a historic organization or heritage site (31%).
- Nearly as many are from governments (28%). The rural heritage areas (Lower Susquehanna and Southern MD) are more likely than other areas to have government representatives (63%).
- Tourism representatives make up 18% of the stakeholders. The rural area had no tourism representatives in this group of stakeholders.

### A. Who are the stakeholders and how do they feel about their heritage area?

#### **Most stakeholders feel their heritage area:**

- Has strong local heritage sites (80%);
- Has beautiful viewsheds (72%) – Note that the Metropolitan (41%) and Suburban DC (43%) stakeholders are less likely to cite viewsheds and Eastern Shore (91%), Western MD (90%), and Rural (100%) stakeholders are much more likely to do so;
- Themes fit the resources available (71%);
- Heritage tourism is increasing well (61%) – all other area stakeholders mention this attribute significantly more often than Suburban DC stakeholders do (29%);
- Excellent ways to access natural areas (58%) – all other area stakeholders mention this attribute significantly more often than do Metropolitan (30%).

### A. Who are the stakeholders and how do they feel about their heritage area?

#### **Most stakeholders feel their management entity:**

- Facilitates networking in the area (70%);
- Has the support of local governments (65%). Eastern Shore stakeholders are likely to say they have government support (75%) more often than Suburban DC stakeholders do (48%);
- Uses management plan to guide area development (63%). More stakeholders in Metropolitan (78%) than in Western MD (45%) say they use the management plan for this purpose;
- Is inclusive and diverse in membership (59%). More feel this way among Metropolitan stakeholders (74%) and fewer do so in Western Maryland (35%);
- Most stakeholders in Metropolitan (67%) and Rural (75%) say their management entity inspires confidence – significantly more than do so in any other area.

### B. What benefits and drawbacks have the heritage areas brought to their communities?

#### **Benefits:**

- Most stakeholders believe that funding is the benefit the heritage program has brought. They acknowledge the chance to apply for grants and mini-grants (89%) and funding for area projects (81%) as benefits;
- Most also feel that the heritage areas have provided ways for them to work together effectively (72%) and coordination for a larger area (59%);
- Preservation of historic resources (70%) is more widely cited as a benefit than preservation of cultural traditions (60%) or protection of natural resources (34%); and
- Interpretive themes for us to support (65%), new products for tourists (59%), and better signage and wayfinding (52%) are also acknowledged as benefits by many.

### B. What benefits and drawbacks have the heritage areas brought to their communities?

#### **Drawbacks:**

- One-third of stakeholders can see no drawbacks to being in a heritage area (34%).
- One-third also feel that the matching funds needed are too high (35%). This view is more widespread among employees of the heritage areas (64%) than any other industry segment.
- One-quarter of stakeholders feel there is too much red tape and bureaucracy (26%).
- About as many feel that the heritage area creates increased competition for limited funds in the area.
- Fewer feel that it takes too long to receive paperwork for grants (15%) – again primarily from the directors and staff of the heritage areas (55%).
- Some feel that grant applications are confusing (14%). This issue is more prevalent in Western Maryland (30%) than in Metropolitan (7%) or Suburban DC (10%).
- No other drawback was selected by more than one stakeholder in ten.

### C. What's important to the success of a heritage area?

Stakeholders were shown 24 descriptions and asked to evaluate them on a 10-point importance scale. Our analysis examines the “top boxes” – the proportion who select 8, 9, or 10 to describe how important the issue is to the success of a heritage area.

**Preservation** is key to success for stakeholders.

- Preservation of historic sites and structures (97%);
- Preservation of cultural traditions (85%); and
- Conservation of natural resources (78%).

Increasing **ease of access** is also widely important to stakeholders.

- Maps and brochures describing the area's attractions and how to access them (97%);
- Wayfinding signage to help tourists find their way to the sites in the heritage area (95%);
- Signage to mark the presence of a heritage area (82%); and
- Local tour programs to package the attractions into an easily accessible trip (68%).

### C. What's important to the success of a heritage area?

**Marketing and local outreach** are important to the vast majority of stakeholders in a successful heritage area.

- Promotion of heritage area sites at accommodations and sites in order to enhance multiple site visits (88%);
- A good working relationship with local media to assure that information about the heritage area is available to residents (82%); and
- A strong local public outreach program that cultivates community involvement (78%).

Stakeholders find the **themes** that support their work are also important to success.

- Heritage themes that intrigue visitors and ways to experience the themes (88%);
- A central organizing theme that defines the area as different and distinctive (78%).

### C. What's important to the success of a heritage area?

Different types of **area attractions** are viewed by different proportions of stakeholders as important to the success of a heritage area.

- A variety of museums and other historic sites that are open on a regular basis (88%);
- Recreational opportunities in natural areas (66%); and
- Tourism resources such as spas, golf clubs, amusement parks, boat rentals, and beaches (41%).

**Creature comforts** for visitors are also viewed differently by stakeholders.

- Sufficient accommodations to serve visitors needs (71%);
- Accommodations, restaurants and retail stores that reflect the local flavor (66%);
- A variety of retail outlets to provide visitors with local arts and crafts, and farm produce from the area (58%); and
- Restaurants of a variety of types and styles to meet visitor needs (56%).

### C. What's important to the success of a heritage area?

Stakeholders are anxious to have productive **interactions with their peers.**

- Networking among my peers in the heritage area (73%); and
- A chance to learn from others involved in heritage tourism about issues and challenges in other heritage areas (65%).

**Docent training** and **economic impact** contribute to success for most stakeholders – but **strict adherence to the management plan** does not.

- Training for docents and tour guides (73%);
- A sufficient number of visitors spending money to create significant economic impact (72%);
- Strict adherence to management plan to guide heritage area investment (44%).

### D. How important are the program goals and how well have they been achieved?

Stakeholders were asked to divide 100 points among the seven program goals based on importance. This technique provides the relative importance among the goals using an average for each one.

They were also asked to evaluate how well the goals have been achieved in their area using a 10-point rating scale. Our analysis will again focus on the top box score – the proportion selecting 8, 9, or 10 to express how well they are doing.

The average scores for **importance** of the goals are quite close. The goal which received the highest importance scored 19.7 while the lowest one scored 9.4. The other five goals scored between 13.5 and 15.2.

On how well the heritage areas have achieved these goals the scores are somewhat more varied. The highest top box score is 59% and the lowest is 36%.

Perhaps most interestingly, the rank order of the goals on these tasks are completely non-correlated. Essentially, we have done the best job on the less important goals.

## Stakeholder Views of the MD Heritage Areas Program

### D. How important are the program goals and how well have they been achieved?

	Importance (mean)	Achievement (top box)
Base	116	116
Encourage preservation and adaptive re-use...	19.7	50%
Enhance visitor appeal and enjoyment of the...	15.2	54%
Enable Marylanders and visitors greater access to, and understanding of, the state's history...	14.8	59%
Accomplish these goals via partnerships...	13.8	55%
Increase economic activity associated with tourism...	13.7	36%
Foster linkages among and between heritage attractions that encourage visitors to linger...	13.5	47%
Balance impact of tourism with quality of life...	9.4	58%

### E. What is on stakeholders' wish lists?

Stakeholders were asked to indicate how much they agreed or disagreed with a number of statements concerning the future of heritage areas. Our analysis is based on those who responded *agree completely* or *agree somewhat* – the top 2 boxes on a five-point scale. For negative statements, it will be the *disagree completely* or *somewhat* measure.

Maintenance of state **operating grants** is most widely desired by stakeholders.

- If state operating grants are reduced and then eliminated as currently planned, most heritage area management entities will simply disappear – 83% agree.

### E. What is on stakeholders' wish lists?

Cultural/heritage tourism **marketing** is key to stakeholders.

- “More time and dollars should be spent on marketing Maryland’s cultural heritage tourism experiences –
  - By the Office of Tourism Development” Agree: 82%
  - By the MD HAA” Agree: 72%

### E. What is on stakeholders' wish lists?

Stakeholders would like the MD HAA to provide **measurement tools and best practices guidelines**.

- “We need good standard measurement tools to assess how effective each area has been in meeting its goals, and increasing heritage tourism and economic impact in its area.” Agree: 76%
- “MD HAA should provide ‘best practices’ guidelines for assessing the financial and management policies of the individual heritage areas.” Agree: 72%
- Fewer agree with the stronger statement, “Until we have ways to measure economic impact, we can’t say the program is a success.” Agree: 39%. Western (50%) and Rural (56%) are more likely than Eastern Shore stakeholders (22%) to agree.

More actually disagree with the statement. Disagree: 39% overall

### E. What is on stakeholders' wish lists?

According to stakeholders, **advocating for the protection of the heritage resource** is a function of the heritage areas.

- “Advocacy for protection of heritage and cultural resources is **not** the role of the heritage areas.” Disagree: 77%
- Stakeholders are divided on whether “the **Target Investment Zones** have succeeded in focusing investment in specific areas to achieve results in less time.” Agree: 32%; Disagree: 27%
- More feel that “the Target Investment Zones need to be revised in our area.” Agree: 40%; Disagree: 16%

### E. What is on stakeholders' wish lists?

Half or more of the stakeholders agree with the following statements:

- “The MD HAA should fund development of local **K-12** heritage education programs.” (58%);
- “I wish there were more opportunities to **meet** with people doing what I’m doing in other heritage areas.” (55%);
- “The **number of grants** awarded in a heritage area should vary with the number of heritage resources, the size of the area, and the number of eligible grantees.” (53%).

### E. What is on stakeholders' wish lists?

Stakeholders are divided about the following statements:

- “I’m concerned about the possibility of conflict between the heritage area management entity and its partners when raising money for heritage area program operations.”  
Agree: 43%; Disagree: 24%
- “The MD HAA spends **too much time and too many dollars** on the preservation of historic buildings and not enough on cultural or natural resources.”  
Agree: 20%; Disagree: 47%

### F. Where do stakeholders want their heritage area to be in 10 years?

Heritage area stakeholders were asked to select three phrases from a list of 12 to describe where they would like their heritage area to be in ten years.

- The most popular change desired is to have more visitors enjoying the sites and amenities of our area (48%). Interestingly, though, many fewer indicated they wanted a larger contribution of the heritage area to economic benefits for the community (18%).
- Fully a third of the stakeholders want stronger advertising and communication about our heritage area and its components (34%).
- One-quarter would like to see better signage and wayfinding throughout our heritage area (28%). Suburban DC area stakeholders are especially likely to be interested in signage (52%) – significantly higher than for the Eastern Shore (19%), Metropolitan (19%) and Rural (19%).
- A similar proportion would like to see more heritage tourism products such as sites, exhibits and trails (27%).

### F. Where do stakeholders want their heritage area to be in 10 years?

- One-quarter of the stakeholders would like to see more effective cooperation among state programs in our heritage area such as – heritage areas, scenic byways, main street, tourism, agriculture, etc. (28%).
- About as many would like to see more effective local partnering between sites and tourism organizations and businesses (25%).
- Fewer would like to see more tourism amenities such as restaurants, motels/B&Bs, boat/bike rentals, and special retail stores (15%). In the Eastern Shore (25%) and the Rural area (25%) stakeholders are more likely to be interested in having these amenities than are those in Western Maryland (5%) or Metropolitan (4%).
- A similar small proportion would like to have preservation programs underway in more locations in our heritage area (16%), or to have interpretive themes that are more appealing to visitors and residents (14%), or to achieve national heritage area designation (14%), or to have vibrant folk and living traditions (13%). Interest in national designation is more widespread in Metropolitan (30%) than elsewhere.

### G. What do stakeholders feel MD HAA should do in the future?

Stakeholders were asked to evaluate 15 tasks which might be undertaken by MD HAA in the future based on desirability. Again, they used a 10-point scale and we will use top box score – 8, 9, 10 for our analysis.

- Not surprisingly, the item receiving the strongest desirable score is maintaining or increasing operating grant funding for heritage areas (84%). Also included was the negative version of this concept – eliminating operating grants so that heritage areas succeed or fail on their own funding. That statement achieved only 2% top box ratings!
- Also related to funding, two-thirds of the stakeholders feel that making grant funds available to heritage attractions for marketing their sites is a desirable change (66%). Suburban DC stakeholders are more likely to consider this step desirable (81%), in comparison with Metro (59%), and Rural (50%).
- Nearly as many see making capital grants available in the entire heritage area, not just in Target Investment Zones (61%). Both Metropolitan (74%) and Western MD (70%) are significantly more likely than Rural (38%) to find this change in capital grants desirable.

### G. What do stakeholders feel MD HAA should do in the future?

Issues relating to access to heritage areas also receive high desirable ratings.

- Ensuring that clear signage is developed by each area to define and navigate in the heritage areas is desirable for many (72%). More stakeholders in Metropolitan (85%) and Rural (81%) than Eastern Shore (59%) find signage desirable.
- Developing an improved statewide map and guide that maps all heritage areas and physically as well as thematically relates them to each other and to Maryland Byways is desirable for a similar proportion (68%).
- Developing and highlighting interesting and environmentally friendly transportation systems within and between heritage areas (e.g., hiking/biking/paddling trails; ferries, rail connections, etc.) is also desirable for two-thirds of the stakeholders (64%).

### G. What do stakeholders feel MD HAA should do in the future?

Communications issues receive a split vote.

- Half the stakeholders would find requiring each heritage area to prepare and publish in print and online a brochure describing the area's themes, resources, and suggested tours desirable (54%). Suburban DC is more likely than all the other areas to consider this possibility desirable (86%).
- At the same time, only a third of the stakeholders wish the MD HAA to ensure that there is consistency of brochures and map styles across all heritage areas (35%). Apparently, it is fine to require brochures – but not to make heritage areas conform to a consistent style.

A statewide heritage plan is desirable for some – but not a majority of stakeholders.

- Fewer than half of the stakeholders find developing a statewide interpretive plan to which heritage areas could relate interpretation and programming desirable (45%).

### G. What do stakeholders feel MD HAA should do in the future?

Stakeholders are least likely to favor the MD HAA tightening requirements for the management entities.

- Three stakeholders in ten find assessing the heritage area management entity performance more stringently (30%). Metropolitan (15%) and Rural (13%) are less likely than the other areas to find this concept desirable.
- A similar proportion of stakeholders wish the MD HAA to provide scorecard measures by which heritage areas are evaluated and compared (29%).
- Fewer are positive about de-certifying heritage areas that do not meet minimum measures of success (22%) or providing management guidelines such as the disciplines and job titles which must be included on the heritage area boards (19%) or directing more specifically how local heritage area operating funds may be spent (13%).

# re-

again:anew <research>

re\*discover

re\*connect

re\*think

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