

Visitors to Maryland Prioritize Their Heritage Interests: An Online Survey

Prepared for:
Maryland Heritage Areas Authority

In Association with:
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HTC Group

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By:

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Research Objectives

- To understand patterns of leisure travel and planning in general;
- To explore historic interests and knowledge of heritage areas generally among Maryland visitors;
- To review trip characteristics and planning for recent travel to Maryland;
- To learn what activities were participated in and what heritage areas were visited on the most recent Maryland trip; and
- To prioritize five historic storylines in each of five historic themes to examine which ones visitors are most interested in exploring.

Research Method

The survey of Maryland visitors was completed on line. Invitations were sent to online panel members in the Washington, DC and Baltimore, Maryland and Philadelphia DMAs.

To qualify for inclusion in the survey, panel members had to have

- Traveled for leisure purposes, either staying overnight or traveling at least 50 miles away from home on a day trip during the past 12 months; and
- Visited Maryland on such a leisure trip in the past 12 months.

A total of 269 panel members qualified and completed the survey. We added 13 interviews completed with people who provided their email addresses while in Maryland. Our total sample, then, included 282 past year Maryland visitors.

Invitations were sent on November 17 and the survey was completed on November 21, 2008.

What We'll Cover

- A. How do Maryland visitors generally travel for leisure?
- B. What experiences do visitors enjoy most at historic sites?
- C. What type of leisure trip was recently taken to Maryland?
- D. Where do visitors turn for trip planning information?
- E. What did visitors do while in Maryland?
- F. How do Maryland visitors prioritize historic concepts and themes?

Sample Composition

Sample Characteristics	Total
Marital Status	
Married	64%
In a domestic partnership	7
Single, never married	17
Divorced, widowed, separated	12
Household Size	
Average Number	2.85
Household Composition	
<u>Any children 18 or younger</u>	<u>38%</u>
Children younger than 6	15
Children 6 – 12	19
Children 13 – 18	19
Adult children	15
Other adults	72
Live alone	19
Educational Attainment	
High school graduate	6%
<u>College experience</u>	<u>94</u>
Some college, including AA	21
<u>College graduate</u>	<u>73</u>
College only	34
Graduate work	39

Sample Composition (Cont.)

Sample Characteristics	Total
Age	
Average age	43.8
Gender	
Man	48%
Woman	52
Ethnic Background	
Caucasian/white	83%
African American	6
Hispanic/Latino	1
Native American	1
Other	10
Annual Household Income	
Less than \$50,000	14%
\$50,000 - \$74,999	20
\$75,000 - \$99,999	24
\$100,000 - \$149,999	25
\$150,000 or more	16
Estimated Mean	\$98,183
DMAs	
Baltimore	43%
Washington, DC	41
Other	16

The Findings in Detail

A. How Do Maryland Visitors Generally Travel for Leisure?

Visitors are frequent travelers. On average they take about six trips a year on which they stay away from home overnight (5.78) and a similar number of day trips on which they travel more than 50 miles from home (6.18).

Fully a third of the visitors say they **always** select their destinations based on their interest in specific activities or interests (38%) while half say they **often** do so (50%). Clearly both activities and interests are important in destination selection.

A. How Do Maryland Visitors Generally Travel for Leisure?

Interestingly, one or more activities in each of the major categories was selected by a similar proportion of visitors. Although there were many more sites and activities in the historic sites category, one or more was selected by nine out of ten visitors for the top four categories.

	Proportion Selecting 1 or more	# of Items in Category
Historic Sites	89%	9
Natural Scenery	89%	4
Outdoor Recreation	87%	4
Cultural Attractions	87%	3
Towns and Cities	80%	3
Shopping	73%	3
Other	86%	2

A. How Do Maryland Visitors Generally Travel for Leisure?

Historic Sites (89%)

Specific types of historic sites selected by half or more of the Maryland visitors as of interest generally include --

- *Visiting historic districts (69%),*
- *Visiting monuments and memorials (61%),*
- *Visiting Civil War battlefields and sites (48%), and*
- *Learning about our nation's founding and early settlement (45%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Natural Scenery (89%)

Half the visitors or more select --

- *Viewing the scenery -- fall foliage, spring blossoms, etc. (70%),*
- *Enjoying nature/the outdoors (65%), and*
- *Driving designated scenic routes (52%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Outdoor Recreation (87%)

Again, half the visitors or more select --

- *Going to the beach (73%),*
- *Outdoor recreation – hiking, biking, skiing/boarding, snowmobiling, etc.(55%), and*
- *Recreation on the water – boating, canoeing, kayaking, fishing (49%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Cultural Attractions (87%)

- *Visiting museums (art, history, agricultural, maritime) (72%)*
- *Attending festivals, seasonal festivals or cultural events (66%), and*
- *Attending performing arts events (44%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Towns and Cities (80%)

- *Visiting small towns (55%),*
- *Visiting large cities/urban areas (53%), and*
- *Visiting Main Street communities (48%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Shopping (73%)

- *Buying locally grown produce (51%),*
- *Shopping for antiques and local arts and crafts (50%),*
and
- *Souvenir shopping (34%).*

A. How Do Maryland Visitors Generally Travel for Leisure?

Other (86%)

- *Dining on local cuisine (73%), and*
- *Visiting theme parks or amusement parks (55%).*

B. What Experiences Do Visitors Enjoy Most at Historic Sites?

There is only modest consensus concerning which interpretive approaches are enjoyed and which one is most important. Most likely to be enjoyed are –

- *Exhibits on the history of the site (67%), and*
- *Demonstrations of period crafts or tasks (59%).*

Turning to the **most important experience** we find that half the visitors select one of three basic experiences –

- *Exhibits on the history of the site (20%),*
- *Guided tours (16%), or*
- *Living history programs (13%).*

B. What Experiences Do Visitors Enjoy Most at Historic Sites?

Experiences	All Enjoyed	One Most Important
Exhibits on the history of the site	67%	20%
Demonstrations of period crafts or tasks	59%	6
Guided tours	50%	16
Living history programs	50%	13
Behind the scenes tours	49%	4
Driving tours with markers and appropriate signage	47%	5
Authentic musical performances	47%	4
Re-enactments of events or battles	45%	4
Guides dressed in period costumes	45%	4
Hands on activities for adults	43%	2
Videos/films to watch on site	41%	3
Interpreted hiking, biking or paddling trails	39%	5
Special programs or lectures	39%	2
Self-guided audio tours (CDs or iPods)	35%	4
Hands on activities for children	34%	7

B. What Experiences Do Visitors Enjoy Most at Historic Sites?

Heritage Areas are perceived quite positively.

- Two thirds of visitors say they would be much more likely to visit a site in a designated Heritage Area (17%) or somewhat more likely (45%) to do so.
- Only 38% say they would **not** be more likely to visit a site in a designated Heritage Area than a similar site elsewhere.

Those who are ***much more likely*** to visit a site in a designated Heritage Area are significantly more likely to enjoy some historic experiences than are those ***not*** more likely to do so:

- *Exhibits on the history of the site* (78% vs. 61%);
- *Living history programs* (61% vs. 43%);
- *Driving tours with markers and appropriate signage* (55% vs. 37%);
- *Re-enactments of events or battles* (57% vs. 38%); and
- *Videos/films to watch on site* (53% vs. 35%).

C. What Type of Leisure Trip Was Recently Taken to MD?

In the past year, Maryland visitors have taken an average of

- 2.4 overnight leisure trips to Maryland ,and
- 4.7 day leisure trips to Maryland at least 50 miles from their home.

On the most recent leisure trip to Maryland, visitors are most likely to have traveled with –

- spouse/significant other/domestic partner (73%),
- children (30%),
- friends (24%) ,
- other relatives (16%),
- with their grandchildren (3%) or
- alone (5%).

C. What Type of Leisure Trip Was Recently Taken to MD?

Recently, most visitors took an overnight trip (77%) while one quarter took a day trip (23%).

Among all visitors, the average length of stay was 2.7 nights.

Half of all visitors stayed at a national chain hotel/motel (27%), or at the home of family or friends (20%).

D. Where Do Visitors Turn for Trip Planning Information?

In planning their trip in Maryland, visitors used a variety of different sources of information, averaging 4.2 sources. Fully 87% report using electronic or online sources while 80% report using offline sources.

The most popular of the 13 online sources listed is search engine websites (Google, Yahoo, etc.) (46%).

- Next are local city, county or area tourism websites (26%) and Maryland State Parks/Department of Natural Resources website (26%).
- In the next tier of sites mentioned are the Maryland Office of Tourism website (18%) and websites for individual Maryland Heritage Areas (17%) among others.

D. Where do Visitors Turn for Trip Planning Information?

<u>Online and Electronic Sources</u>	
Search engine websites (i.e. Google, Yahoo, etc.)	46%
Local city, county or area tourism websites	26%
Maryland State Parks/ Department of Natural Resources website	26%
National Parks websites	19%
Maryland Office of Tourism website	18%
Websites for individual Maryland Heritage Areas	17%
Airline/hotel websites	15%
Special interest websites (i.e. history, Civil War websites etc.)	15%
AAA website	15%
Online travel agency websites (i.e. Expedia, Travelocity, etc.)	11%
Travel guide websites (i.e. Frommers, Fodors, etc.)	11%
Scenic Byways websites	6%
DVDs or podcasts for touring the individual Heritage Areas	2%

D. Where Do Visitors Turn for Trip Planning Information?

The most popular of the 16 offline sources is friends, family, co-workers (45%), with only half as many selecting the next most popular, *articles in magazines* (22%).

Maryland's Official Tourism Guides (11%) and Brochures for individual Maryland Heritage Areas (10%) are mentioned by a similar proportion.

D. Where Do Visitors Turn for Trip Planning Information?

<u>Offline Sources</u>	
Friends, family, co-workers	45%
Articles in magazines	22%
Visited a Welcome Center/ Visitor Center	18%
Newspaper travel section	17%
Travel books or guide books	16%
Advertisements in magazines	14%
Called or visited AAA office	11%
Maryland's Official tourism guides	11%
Brochures for individual Maryland Heritage Areas	10%
Maryland Scenic Byways guidebook or map	8%
Special interest guides such as Civil War Trail Map Guides, Historic National Road Guide, etc.	5%
National Heritage Areas Brochure	4%
Called local tourism office	2%
Travel agent	2%
Called a travel company (airline, hotel chain, etc.)	2%
Called Maryland Office of Tourism toll-free number	1%

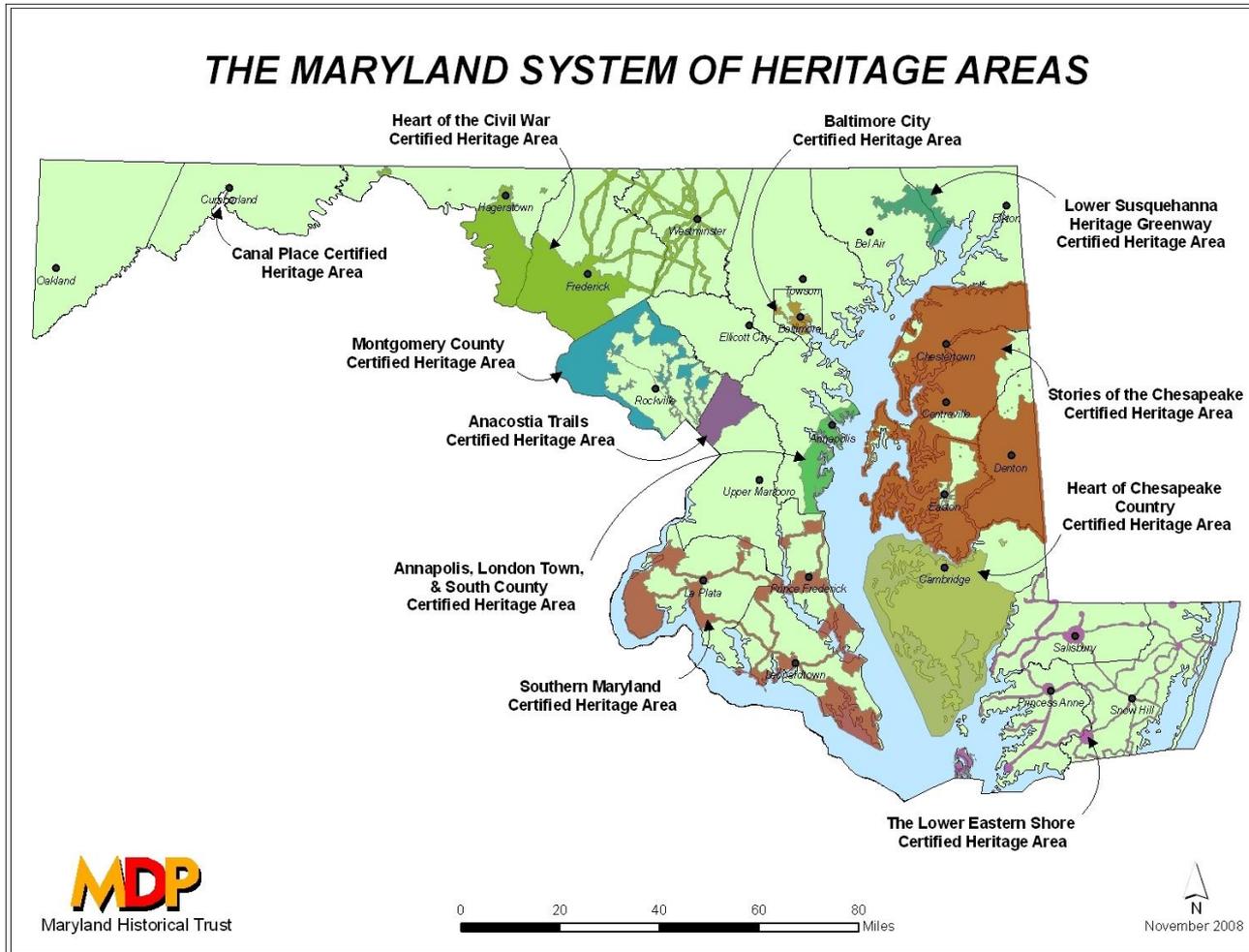
D. Where Do Visitors Turn for Trip Planning Information?

Half of the visitors say that one of the online sources was **most influential** in the decision to visit (54%) and somewhat fewer say an offline source was most influential (43%).

The leading online source is *search engine websites* (15%) but no other source is selected as most influential by more than 7% suggesting a wide dispersion in what is important.

For offline sources, friends, *family and co-workers* is selected as most influential by 22%, half of all the votes for offline. No other source receives more than 4% suggesting a wide dispersion in importance here as well.

E. What Did Visitors Do While in Maryland?



E. What Did Visitors Do While in Maryland?

A portion of the Maryland visitors surveyed had visited each of the 11 Heritage Areas on their most recent trip to Maryland. Naturally the proportion visiting each of the Heritage Areas differed dramatically.

- Most popular are **Annapolis, London Town and South County** (43%) and **Baltimore City** (39%) – the two urban areas.
- **Heart of the Civil War** is third with 34% visiting that Heritage Area.
- The three Heritage Areas on the Eastern Shore are next with one quarter visiting **Stories of the Chesapeake** (27%), one fifth visiting the **Lower Eastern Shore** (21%) and one sixth visiting **Heart of the Chesapeake** (16%).
- **Southern Maryland** (18%) and **Lower Susquehanna** (12%), primarily rural areas, follow.
- Suburban Washington, DC in **Montgomery County Heritage Area** (16%) and **Anacostia Trails** (5%) are next.
- **Canal Place** is visited by one visitor in ten (10%).

E. What Did Visitors Do While in Maryland?

Only one third of the visitors acknowledge that they knew they were in a Heritage Area (32%). Two thirds of the visitors either did not know they were in a Heritage Area (57%) or did not remember (11%).

Twice as many said it was **very influential** (would not have come if it had not been in a Heritage Area) (5%) or **somewhat influential** (helped us decide, gave us a reason to go there rather than somewhere else) (17%) as were negative (10%).

E. What Did Visitors Do While in Maryland?

Using the same descriptions of activities for the trip to Maryland as was used for general leisure travel planning, we asked visitors what they had done on their most recent trip to Maryland. The Maryland trip activities show some interesting differences from the general leisure travel planning activities.

The most widely participated in activity was the natural scenery category (66%), followed by shopping (59%) and then historic sites (57%), cultural attractions (57%), outdoor recreation (56%), towns and cities (51%), and other (64%).

Note that shopping is now near the top of the list suggesting that people do not **plan** to shop on leisure trips but they **do** shop when they travel for leisure. This is especially true for souvenir shopping.

E. What Did Visitors Do While in Maryland?

Natural Scenery (66%)

- *Viewing the scenery (37%),*
- *Visiting a Maryland state park (36%), or*
- *Enjoying nature/the outdoors (36%).*

Shopping (59%)

- *Souvenir shopping (35%),*
- *Buying locally grown produce (34%), or*
- *Shopping for antiques or local arts and crafts (29%).*

Historic Sites (57%)

- *Visiting historic districts (33%),*
- *Visiting monuments and memorials (24%), and*
- *Visiting Civil War battlefields and sites (18%).*

E. What Did Visitors Do While in Maryland?

Cultural Attractions (57%)

- *Visiting museums (arts, history, agricultural, maritime) (34%), and*
- *Attending festivals or cultural events (34%).*

Outdoor Recreation (56%)

- *Swimming/beaches (35%) ,*
- *Outdoor recreation – hiking, biking, skiing/boarding, snowmobiling (25%),*
- *Water-based recreation – boating, canoeing, kayaking, fishing (23%).*

E. What Did Visitors Do While in Maryland?

Towns and Cities (51%)

- *Visiting small towns (33%),*
- *Visiting Main Street communities (28%), and*
- *Visiting large cities/urban areas (17%).*

Other (64%)

- *Dining out on local cuisine (55%),*
- *Visiting theme parks or amusement parks (15%).*

F. How Do Maryland Visitors Prioritize Historic Concepts and Themes?

The five Maryland Historic Themes were:

- Founding, Settlement and Growth;
- Natural Resources;
- Maryland's Role in National Conflicts;
- Transportation and Work; and
- African-American History.

Founding, Settlement and Growth

Most popular in this theme is *early architecture and building traditions* (26.1) followed quite closely by *founding and settlement* (22.8) and *Native American history* (21.6)

Early architecture and building traditions	26.1
Founding and settlement – John Smith and other notable Maryland settlers	22.8
Native American history, culture and traditions	21.6
Religious freedom – the founding of Protestant and Catholic denominations, early churches, religious tolerance	15.2
Immigration and western expansion	14.3

Natural Resources

In natural resources, *outdoor recreation and adventure past and present* garnered nearly a third of all the points assigned (31.3) while Chesapeake Bay foodways received one quarter (24.5).

Outdoor recreation & adventure (hunting, fishing, beaches, boating) past and present	31.3
Chesapeake Bay foodways and cultural traditions	24.5
Changing uses of the land and present day protection of natural resources	15.8
Agriculture – history and present day practices	14.4
Influence of the environment on Maryland’s growth	14.0

Maryland's Role in National Conflicts

America's 18th and 19th century wars – Civil War (26.9), Revolutionary War (23.2) and the War of 1812 (21.8) -- are more popular than those of the 20th century.

Nation and state torn apart – the Civil War on the border in Maryland, and the 150 th anniversary commemoration (2009-2015)	26.9
America's fight for independence – the Revolutionary War	23.2
Finishing the fight for independence – the War of 1812, the bicentennial commemoration of the war (2012-2014), and the story of the Star Spangled Banner	21.8
Role of Maryland in World War II – building a navy and an air force	15.7
The Cold War and modern diplomacy	12.4

Transportation and Work

The working Chesapeake Bay and its tributaries is clearly more popular than any other component of this theme (29.8).

The working Chesapeake Bay and its tributaries – commercial fishing and boating, development of unique boats, historic maritime cultures, growth of waterfront recreation	29.8
Space – the next frontier – NASA Goddard, the Hubble, mapping the universe	21.8
Roads and railroads – changing travel modes, National Road, B&O Railroad	17.8
Construction of transportation modes – canals, railroads, roads	16.8
Aviation inventions and development	13.8

African-American History

The *Civil War and Reconstruction* dominates the African-American History theme with 33.1 points.

Civil War and Reconstruction	33.1
Frederick Douglass, Harriet Tubman and the Underground Railroad	23.3
Antebellum era (slavery and free black communities)	15.5
Desegregation, Thurgood Marshall and Civil Rights	14.5
African-American cultural traditions – arts and entertainment	13.6

F. How Do Maryland Visitors Prioritize Historic Concepts and Themes?

The Maryland Historic Themes

Founding, Settlement and Growth	26.4
Natural Resources	26.1
Maryland's Role in National Conflicts	19.0
Transportation and Work	16.2
African-American History	12.3

F. How Do Maryland Visitors Prioritize Historic Concepts and Themes?

Individual Storylines	Theme	Points Assigned
Outdoor recreation and adventure... past and present	Natural Resources	907
Early architecture and building traditions	Founding, Settlement	718
Founding and Settlement, John Smith ...	Founding, Settlement	587
Chesapeake Bay foodways	Natural Resources	580
Native American history, culture...	Founding, Settlement	547
Nation and state torn apart...	National Conflicts	531
The working Chesapeake Bay...	Transportation and Work	438
The Revolutionary War	National Conflicts	432
Changing uses of land...	Natural Resources	428
Religious freedom...	Founding, Settlement	417
The War of 1812	National Conflicts	397
Immigration and Western Expansion	Founding, Settlement	365

F. How Do Maryland Visitors Prioritize Historic Concepts and Themes?

Individual Storylines	Theme	Points Assigned
Space – the next frontier	Transportation and Work	355
Agriculture – history and practices	Natural Resources	352
Influence of the environment...	Natural Resources	345
Frederick Douglass, Harriet Tubman	African-American History	309
Roads and railroads...	Transportation and Work	307
World War II ..navy and air force	National Conflicts	305
Construction of transportation modes...	Transportation and Work	300
Civil War and Reconstruction	African-American History	273
The Cold War and modern diplomacy	National Conflicts	229
Aviation inventions and development	Transportation and Work	225
Desegregation, Marshall, civil rights	African-American History	218
Cultural traditions, arts	African-American History	218
Slavery and free black communities	African-American History	215

re-

again:anew <research>

re*discover

re*connect

re*think

re*view

