

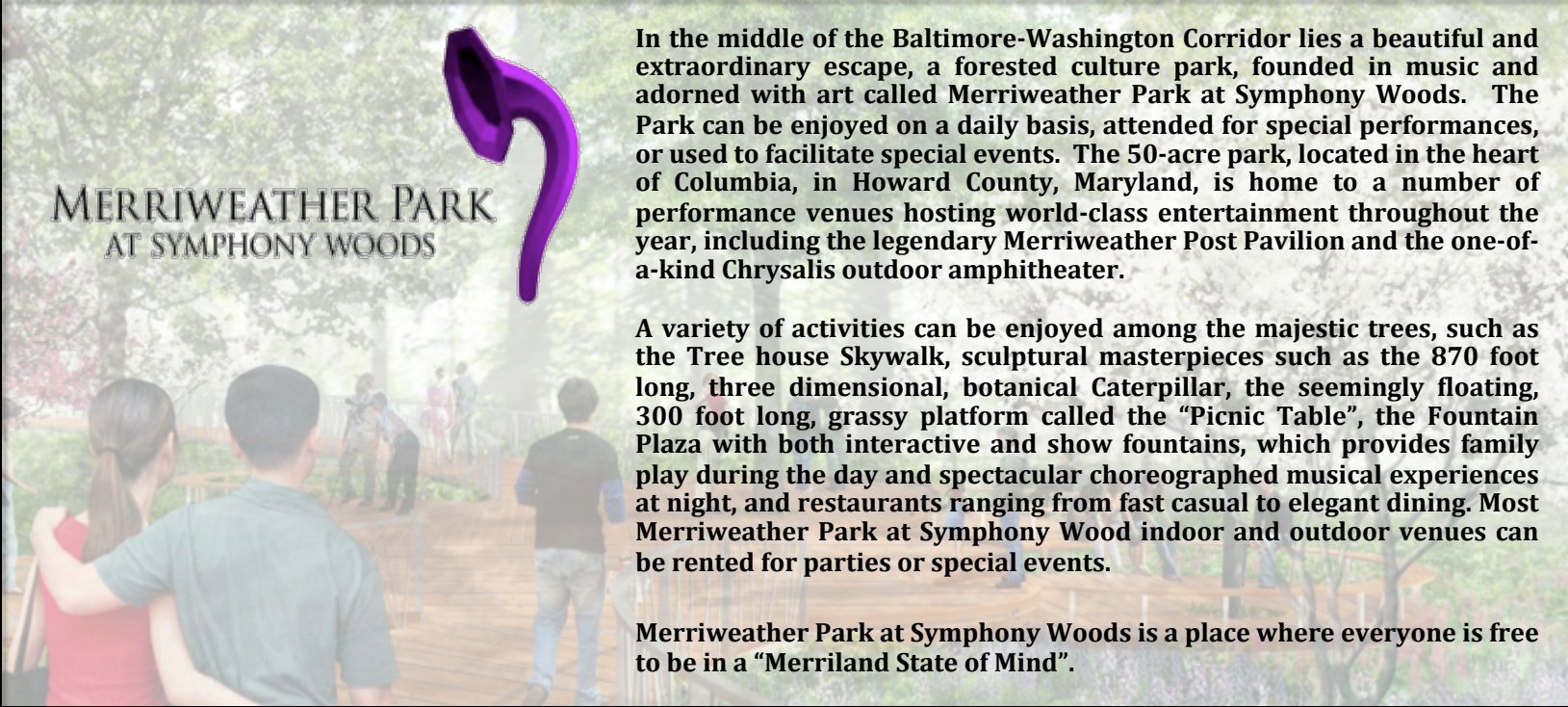


MERRIWEATHER PARK AT SYMPHONY WOODS



Introduction to Merriweather Park

Prior to being shown a video of the overall experience, respondents were initially introduced to Merriweather Park at Symphony Woods with a brief written description of the Park similar to what they might see in a short advertisement or internet description.



**MERRIWEATHER PARK
AT SYMPHONY WOODS**

In the middle of the Baltimore-Washington Corridor lies a beautiful and extraordinary escape, a forested culture park, founded in music and adorned with art called Merriweather Park at Symphony Woods. The Park can be enjoyed on a daily basis, attended for special performances, or used to facilitate special events. The 50-acre park, located in the heart of Columbia, in Howard County, Maryland, is home to a number of performance venues hosting world-class entertainment throughout the year, including the legendary Merriweather Post Pavilion and the one-of-a-kind Chrysalis outdoor amphitheater.

A variety of activities can be enjoyed among the majestic trees, such as the Tree house Skywalk, sculptural masterpieces such as the 870 foot long, three dimensional, botanical Caterpillar, the seemingly floating, 300 foot long, grassy platform called the “Picnic Table”, the Fountain Plaza with both interactive and show fountains, which provides family play during the day and spectacular choreographed musical experiences at night, and restaurants ranging from fast casual to elegant dining. Most Merriweather Park at Symphony Wood indoor and outdoor venues can be rented for parties or special events.

Merriweather Park at Symphony Woods is a place where everyone is free to be in a “Merriland State of Mind”.

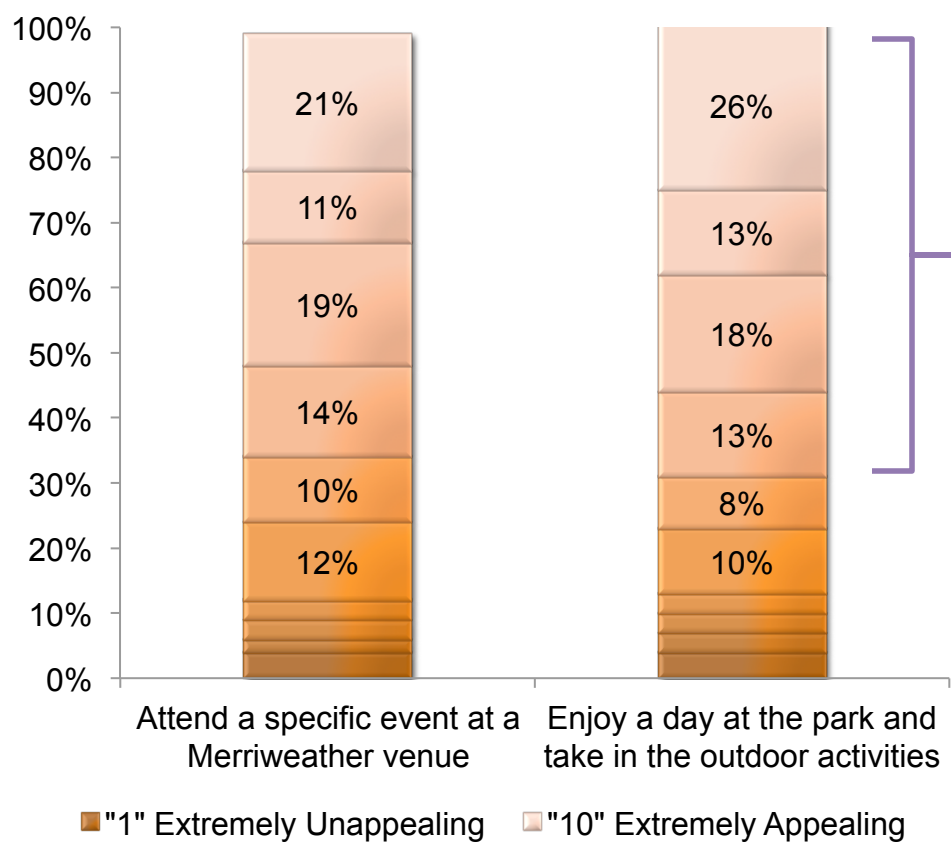
Merriweather Park at Symphony Woods



Interest in Visiting Merriweather Park (Pre-Video)

Based on the written description of Merriweather Park at Symphony Woods , appeal is strong for both visiting the venues for specific events and enjoying a day at the Park. Locals and Tourists have stronger interest than Distant Residents perhaps due to Distant Residents (11-50 miles away) seeing their local offering as closer and easier to visit.

**Interest in Visiting Merriweather Park
(All Respondents)**



Percent 7-10 Interest		
	Attend an Event	Enjoy a Day at the Park
Total	65%	69%
Local	68%	62%
Distant Resident	58%	60%
Mid-Atlantic	69%	77%
Distant Tourist	71%	81%
Family	70%	78%
Non-Family	62%	64%

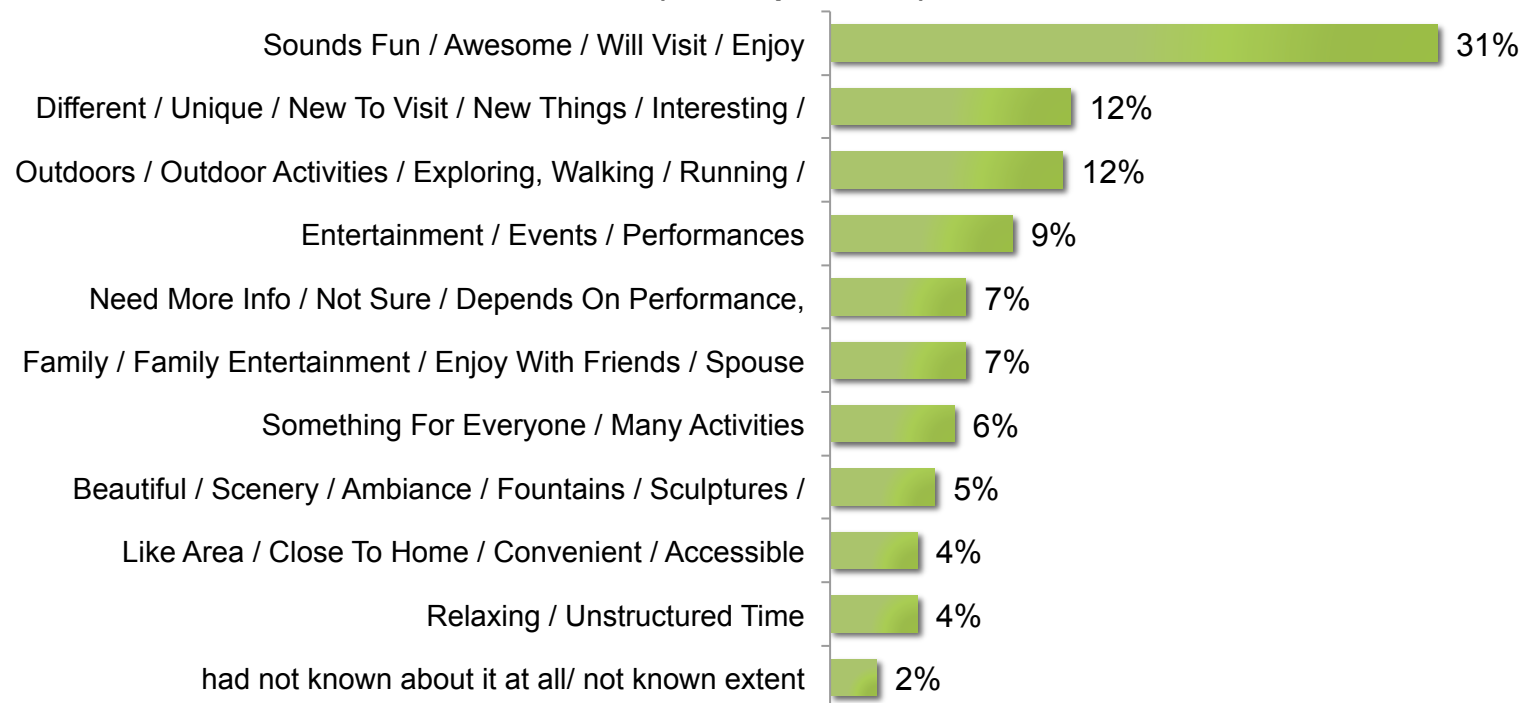


D1: On a scale of 1 to 10, where 1 indicates "not at all interested" and 10 means "extremely interested" how interested would you be in visiting Merriweather Park to: [Attend a Specific Event at the One of the Venues] or [Enjoy a Day at the Park and Take in the Outdoor Activities].

Variety of Activities and Overall Fun Drive Interest

Among those who had a high interest (7-10) in either attending a specific event or spending a day at the Park, the most frequently mentioned positive comments related to the variety of activities and the overall appeal of Merriweather Park at Symphony Woods .

Reasons for High Interest (7-10) (All Respondents)



Reasons for High (7-10) Appeal



"I love the entire description of the park...with art, entertainment, and the beauty of the park itself, it is something that my entire family would enjoy and it has something for everyone. It sounds amazing!"

"Because I love entertainment especially live music and bands. This is something that I would definitely be interesting in attending."

"I love the outdoors and that would be a great experience to enjoy the activity and have some fun."

"I loved it."

"Sounds like a great day/weekend. Love that there is lots to do in one place. You can go from one activity to the next without traveling by car/taxi etc. Win win situation in my eyes."

"Fun."

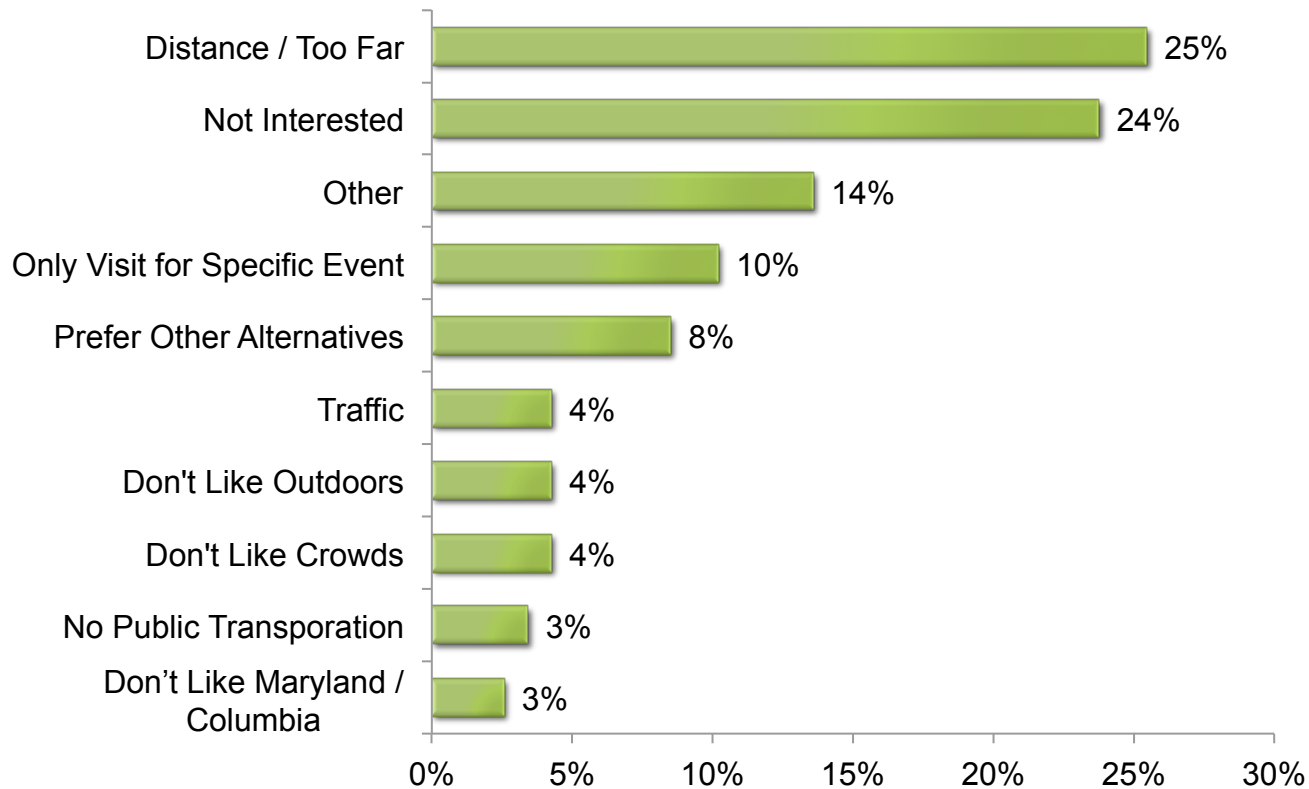
"This place sounds amazing...it sounds like there would be something for everyone, and that we could spend the entire day there and not get bored. It sounds great!"



Distance and Lack of Interest Drive Down Rating for a Few

Those who had a low interest (1-3) (only 10% of respondents) cited distance - especially among Residents - and lack of interest in the concept as the primary reasons. Some respondents (10% of the 10% with low interest in the Park) did indicate they might consider a visit depending on what specific events were offered.

**Reasons for Low Interest Rating (1-3)
(All Respondents)**



INSIGHT

It is hard not to like Merriweather Park at Symphony Woods. Just 10% gave a low interest rating with distance being the biggest barrier (mentioned by less than 3% in total).

IMPLICATION

Having unique and compelling entertainment scheduled will help convert the 1% overall that will make their decision based on specific events.



Reasons for Low (1-3) Appeal



"I would be concerned about traffic to and from D.C. Prefer to do things in the city where we can use public transportation or walk."

"I do not like the area and I don't believe it is safe."

"Just Not Interested."

"I enjoy visiting new places with my family but do not enjoy large crowds."

"I live on the Virginia side of DC so it would have to be a very special event for me to attend, especially if there isn't metro access."

"I'm interested in planned theatrical performances, but not in just wandering around a nature enclave."

"Not on Metro Line."

"Parking is a pain and I'm not really thrilled with the crowds, but would go if there was something I really wanted to see."



Lack of Interest Isn't Just About Merriweather Park

Respondents who indicated a low interest (1-3 on 10 point scale) in either attending a specific event or spending the day at Merriweather Park at Symphony Woods had common characteristics that differentiated them from the total sample of respondents.

- They were older (~50% were 55 or older).
- Were predominantly non-family households.
- Had lower participation and interest in participating in the types of venues and entertainment offered at Merriweather Park at Symphony Woods.

	Total	Low Interest in Attending Specific Event	Low Interest in Spending Day at Park
Age			
21-35	33%	11%	12%
36-45	24%	14%	20%
46-55	21%	21%	21%
56-65	23%	54%	48%
Family Composition			
Young Kids	8%	2%	3%
Older Kids	9%	11%	9%
Multi Age	22%	10%	6%
Non-Family	61%	78%	82%
Participation Last 12 Months (Self or Household)			
Active Outdoor Activities	80%	72%	67%
Visited Museum/Cultural Attraction	81%	69%	66%
Visited National or State Park	75%	64%	57%
Attended Live Theater Performance	57%	47%	49%
Attended Live Dance Performance	30%	18%	17%
Attended Live Concert	65%	51%	51%
Visited Sculpture Garden	32%	20%	22%
Visited Art Gallery	52%	41%	41%
Attended Outdoor Festival	74%	49%	52%
8-10 Interest in Participating			
Active Outdoor Activities	64%	54%	49%
Visiting Museum/Cultural Attraction	64%	47%	48%
Visiting National or State Park	70%	63%	54%
Attending Live Theater Performance	56%	38%	39%
Attending Live Dance Performance	34%	13%	13%
Attending Live Concert	65%	39%	48%
Visiting Sculpture Garden	31%	12%	9%
Visiting Art Gallery	41%	21%	23%
Attending Outdoor Festival	68%	33%	39%



MOST Interested Prospects (Sweet Spot)

The sweet spot of respondents are those who indicated a '10' in interest in visiting the Park for the day AND a '10' for visiting the Park for a special event.

Consistent among both the Local/Resident segment and the Tourist segment, sweet spot respondents are significantly more likely to visit art galleries, attend live theater and dance performances, and visit outdoor festivals. Marketing to patrons of these venues will help spread the word about all there is to do at Merriweather Park at Symphony Woods.

Among Locals/Residents, sweet spot respondents are:

- Significantly more likely to host out of town visitors several times per year;
- More likely to have visited local performance venues (including those at Merriweather Post Pavilion and Symphony Woods) and more frequently; and
- More likely to have visited both the Library and the Mall.

Likewise, Tourists in the sweet spot are nearly three times as likely to have visited a local performance venue on a previous trip.

INSIGHT

The sweet spot are those extremely interested in the Park itself, but who also spark to special events.

IMPLICATION

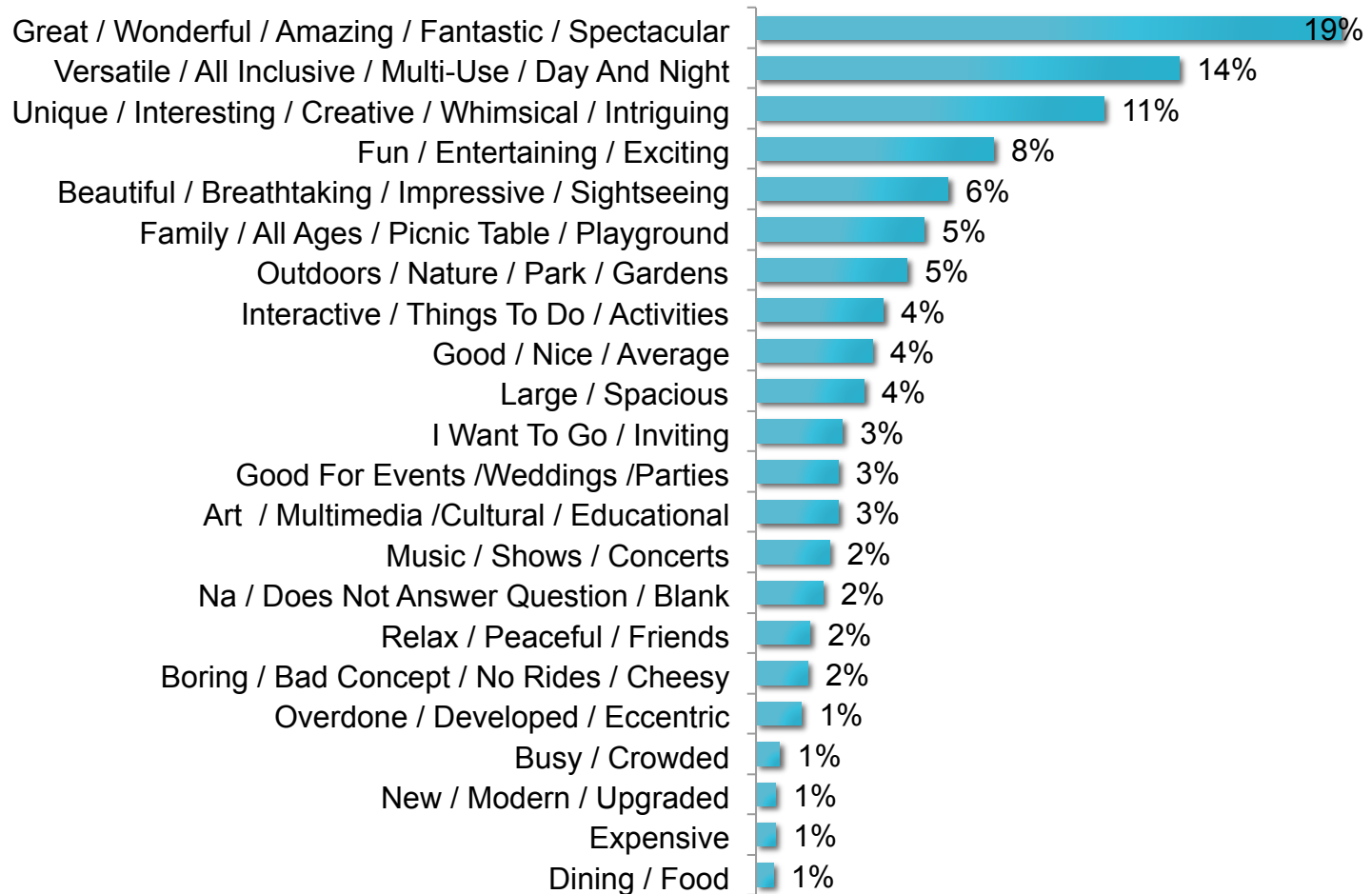
Bringing in acts and entertainment that specifically appeal to this segment will help ensure Merriweather Park at Symphony Wood is a success.



The Word is Positive

The words used to describe Merriweather Park at Symphony Woods were overwhelmingly positive, with only 5% being negative.

Words Used to Describe Merriweather Park at Symphony Woods (All Respondents)



Positive Reactions to the Park



“Beautiful, lots to do and see and something for everyone's taste and likes.”

“Multifaceted, something for everyone, day or night.”

“Amazing.”

“One of the best parks I've ever seen. Full of entertainment and beautiful venue for occasions.”

“It seems to have everything anyone could ask for whether you are young or old.”

“Fascinating and unique.”

I would want my wedding there.”

“A beautiful landscape that is great for all ages and changes from day to evening.”

“An outdoor museum and concert facility with restaurants and bars and something for everyone!”



Most Appealing Aspects

The outdoor offerings and the number and variety of activities tops the list of what prospective visitors find most appealing. There are few differences among geographic origin or families versus non-families.

	Total
Outdoors / Nature / Trail	14%
Many Venues / Versatile / Day And Night / Much To See	13%
Things To Do / Explore / Activities / Interactive	10%
Features / Caterpillar / Tree Houses / Butterfly / Fountains / Picnic Table	10%
Music / Concerts / Shows / Events / Amphitheater / Light Shows	7%
Art / Sculpture / Architecture / Layout / Cultural	7%
Beautiful / Scenery	7%
All Of It / Good / Great / Amazing	5%
Family / Playground / Boom Box / Kids	5%
Friends / Relaxing / Peaceful / Atmosphere	4%
Something For Everyone	3%
Different / Unique	3%
Fun / Entertainment	2%
Nothing	2%
Location / Close / Jobs / Money	1%
Other	7%



Most Appealing Aspects



"Absolutely beautiful design and the incorporation of nature into the overall space."

"The layout the park itself and the greenery the lighting at night.. simply amazing."

"The combination of outdoor space and art for practical use and the variety of things one can do there."



"It is a place that you can go and enjoy a variety of events. It can also be used to have a personal event of your own."

"The entire area seems very interesting and full of things to do for the whole family."

"So many things to do all in one place."



"Floating picnic table, caterpillar and chrysalis -- all very new and different and interesting visually."

"The playground and the giant caterpillar. I have a couple of kids and this seems like a great venue to take them for a full day of activities!"

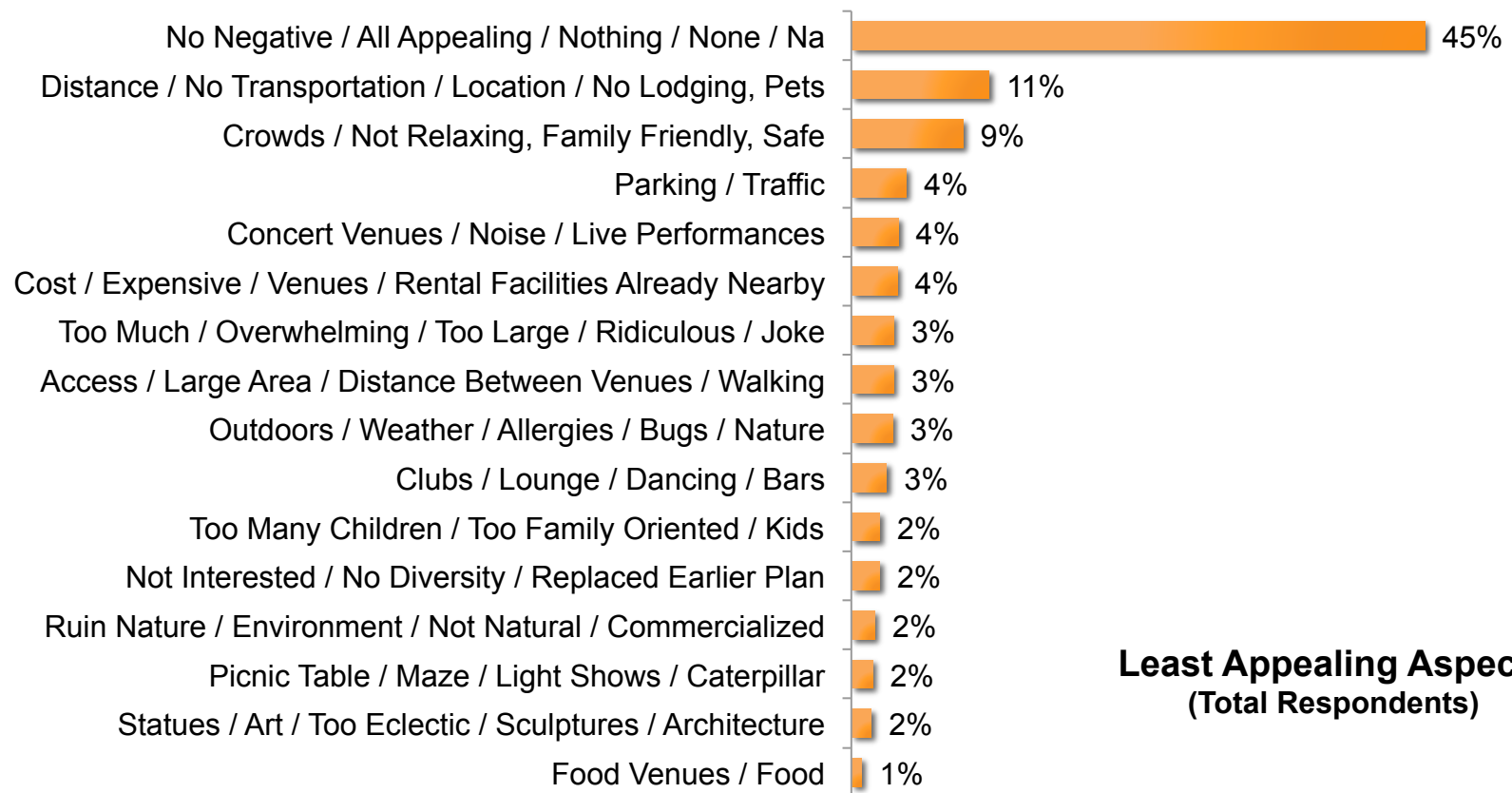
"The Treehouse Skywalk looks awesome to visit."



Least Appealing Aspect = Distance and Access

An unusually high number of respondents (45%) could not list something they did not find appealing, an unusually high number of respondents to be found speechless when it comes to providing critical feedback.

The most frequently mentioned negatives were related to distance, access, crowds, and parking, yet less than 5% mentioned concerns about parking.



**Least Appealing Aspects
(Total Respondents)**



Least Appealing Aspects of the Park

The aspects respondents found least appealing were related to the distance and lack of public transportation, crowding, and traffic/parking.



"I think the distance is the biggest drawback. Living in Northern Virginia, it takes over an hour to get to Maryland by Metro, and this is even farther than that."

"Location, which is not accessible by public transportation."

"Distance. If I want to go to a park there are many closer to home."



"Sounds way too busy... not exactly my idea of a restful, peaceful time."

"I got the impression it got very crowded and my family would not like that."

"Crowds. Too many people could make it more stressful than fun."



"Where are you going to park all those cars?! No, really. And when there's a Merriweather concert going on? Oy. I'm glad I live 1 1/2 miles away, and I will have to find another route to US29...."

"The distance from the parking is a little too far for my taste."



QD3a: What aspects of Merriweather Park are not appealing and why?

A Merriland State of Mind Means You are Free to be...

After viewing the video about Merriweather Park at Symphony Woods, respondents' top-of-mind thoughts of what you are free to be when you are in a "Merriland State of Mind" mostly focused on being "Merry," "Happy," "Free." Overall, the descriptors were mostly positive.



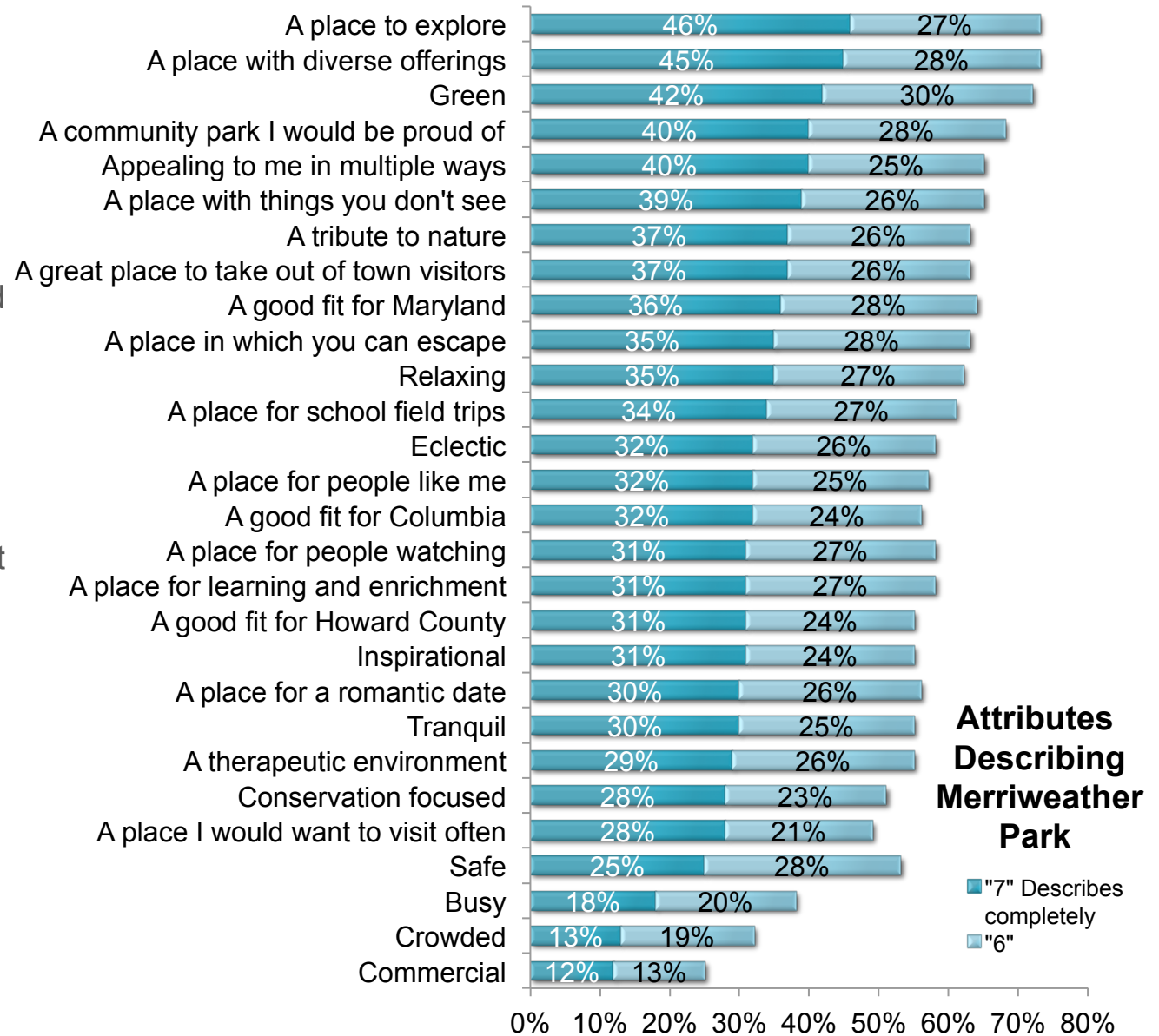
Note: Word size increases with the number of mentions.
D3aa. Please fill in the blank. "A Merriland state of mind means you are free to be _____."?

Overall Park Attributes

There is strong agreement that Merriweather Park at Symphony Woods is a unique and diverse destination, with much to explore.

Ratings for attributes related to being “green” nature also were favorable.

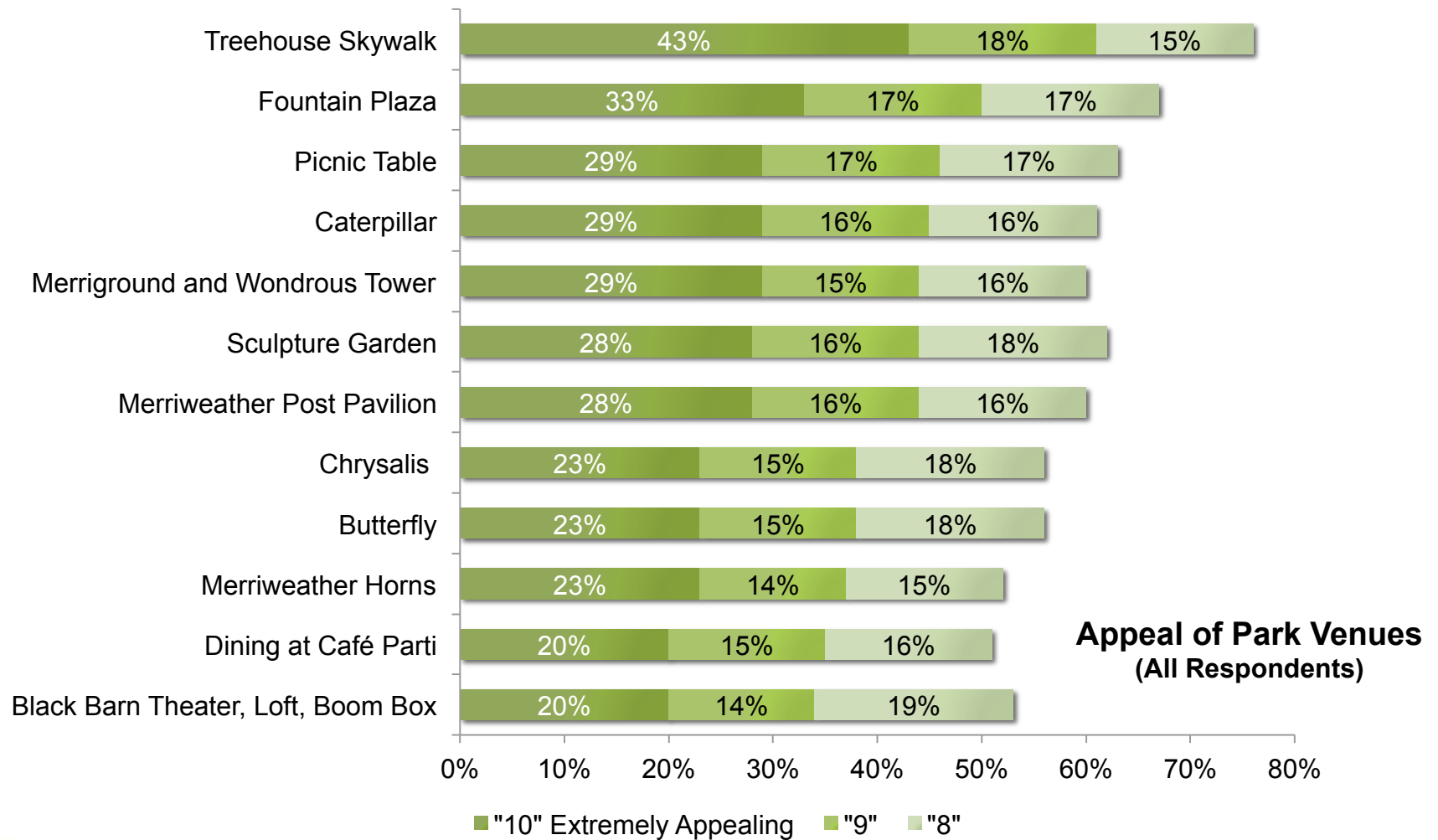
Also, a majority agree Merriweather Park at Symphony Woods is a good fit for Maryland (64% rated it a 6 or 7) and Columbia (56% rated it a 6 or 7).



D3b. For each attribute below, please indicate how well it describes Merriweather Park at Symphony Woods, where 7 indicates it “Describes the park completely” and 1 means “Does not describe the park at all”. You can choose any number from 1 to 7

Relative Appeal of Park Venues

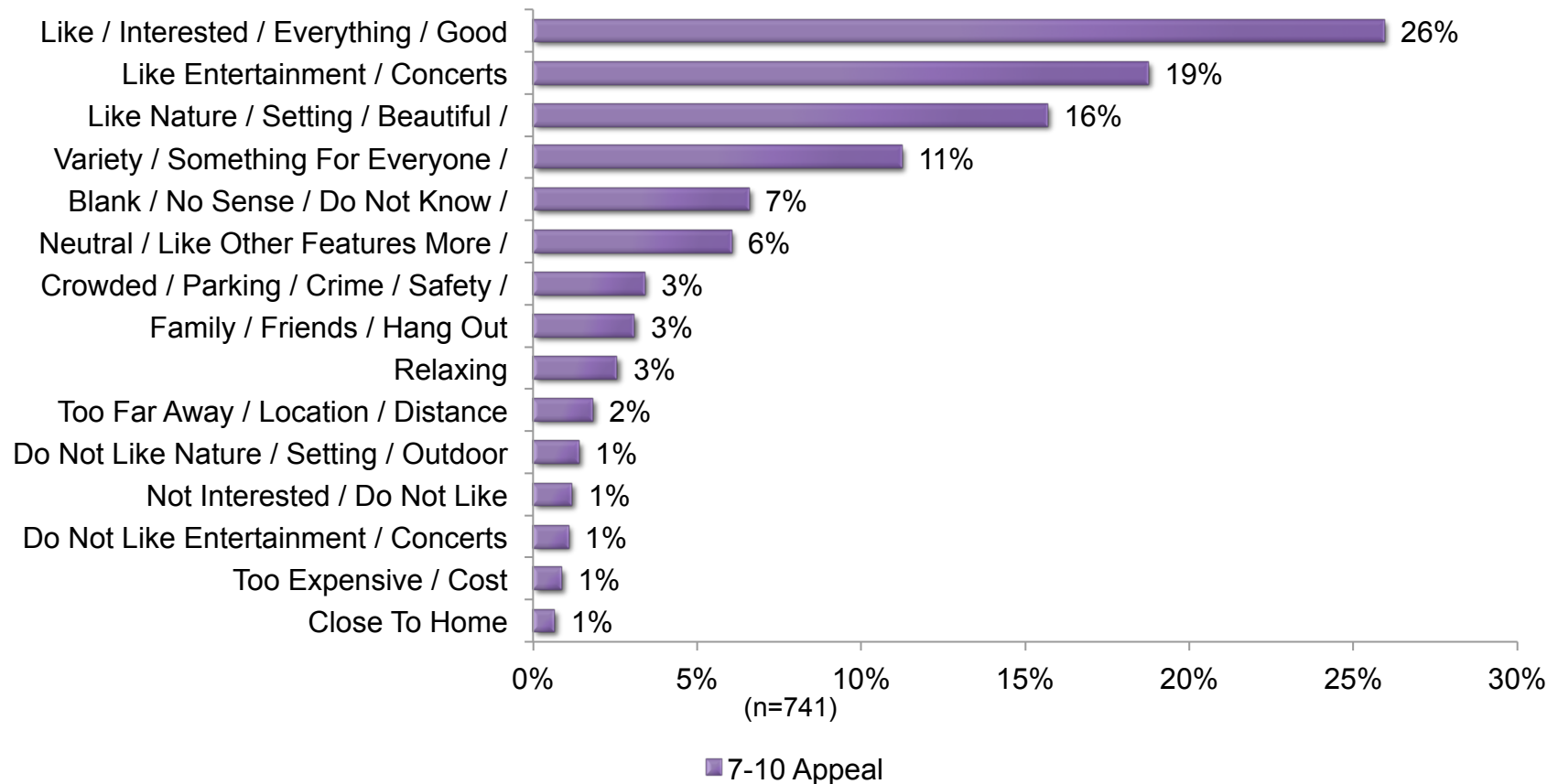
The Treehouse Skywalk led the list of most appealing items, followed by the Fountain Plaza and Picnic Table. All aspects of Merriweather Park at Symphony Woods had at least half of total respondents rating the venue as 8 to 10 in appeal.



Reasons for High (7-10) Appeal

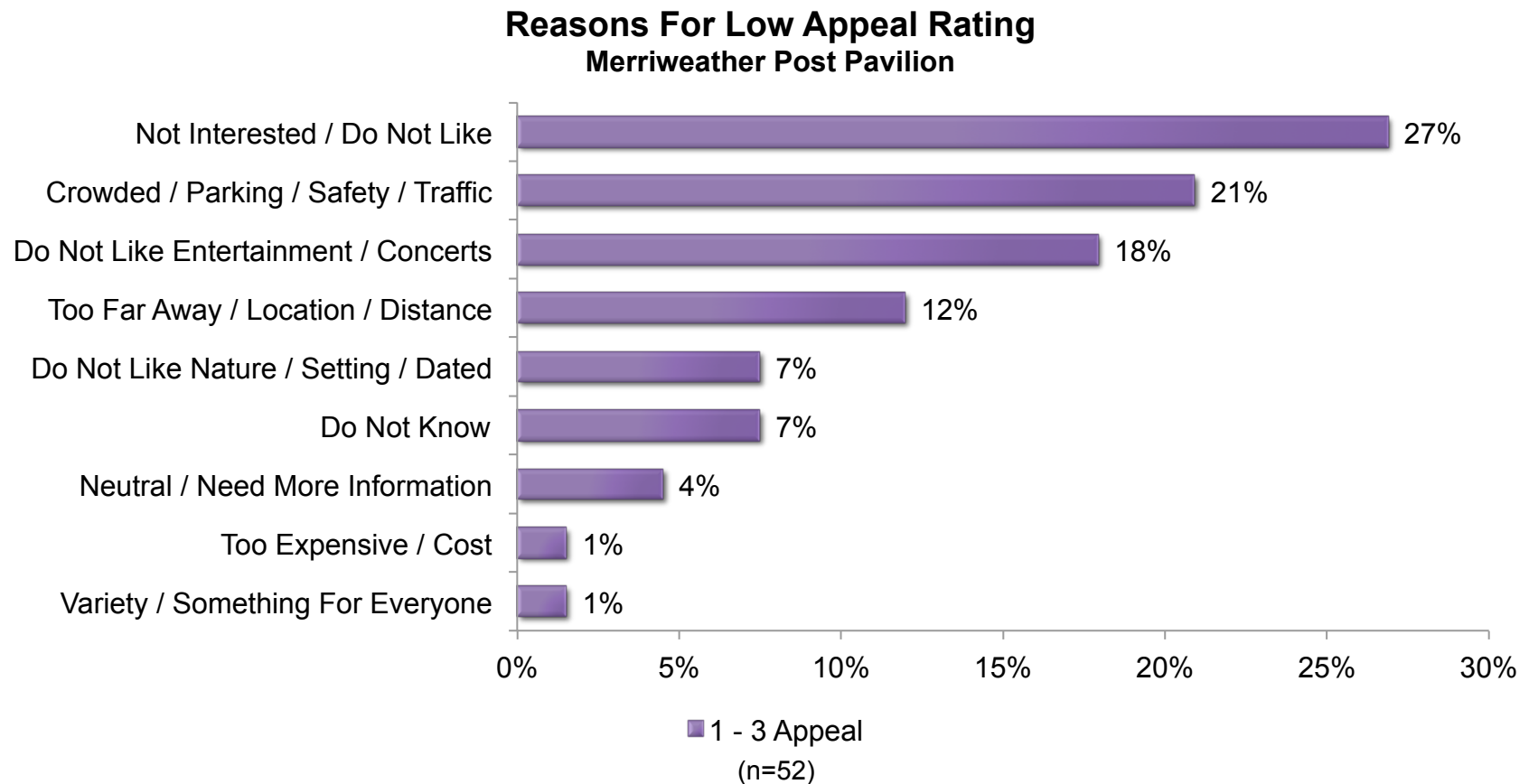
Specifically for Merriweather Post Pavilion, those who rated its appeal high (8-10 on a 10-point scale) did so because they like a variety of live performances and the outdoor setting.

**Reasons For High Appeal Rating
Merriweather Post Pavilion**



Reasons for Low (1-3) Appeal

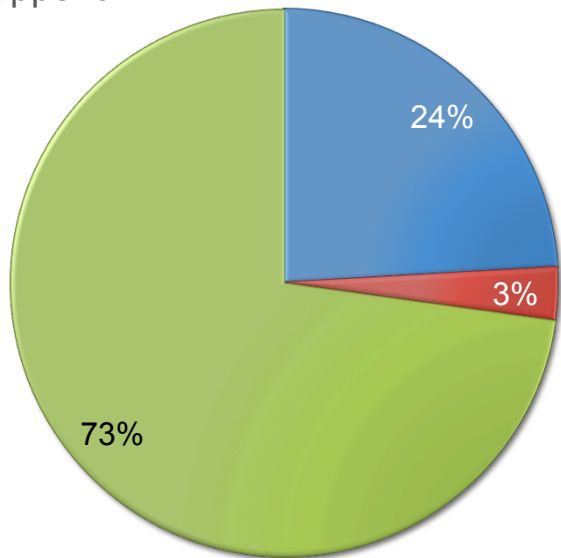
Those who rated Merriweather Post Pavilion low (1-3 appeal) cited crowds, parking, traffic, safety, and lack of interest as primary reasons.



Venues Similar to Merriweather Post Pavilion

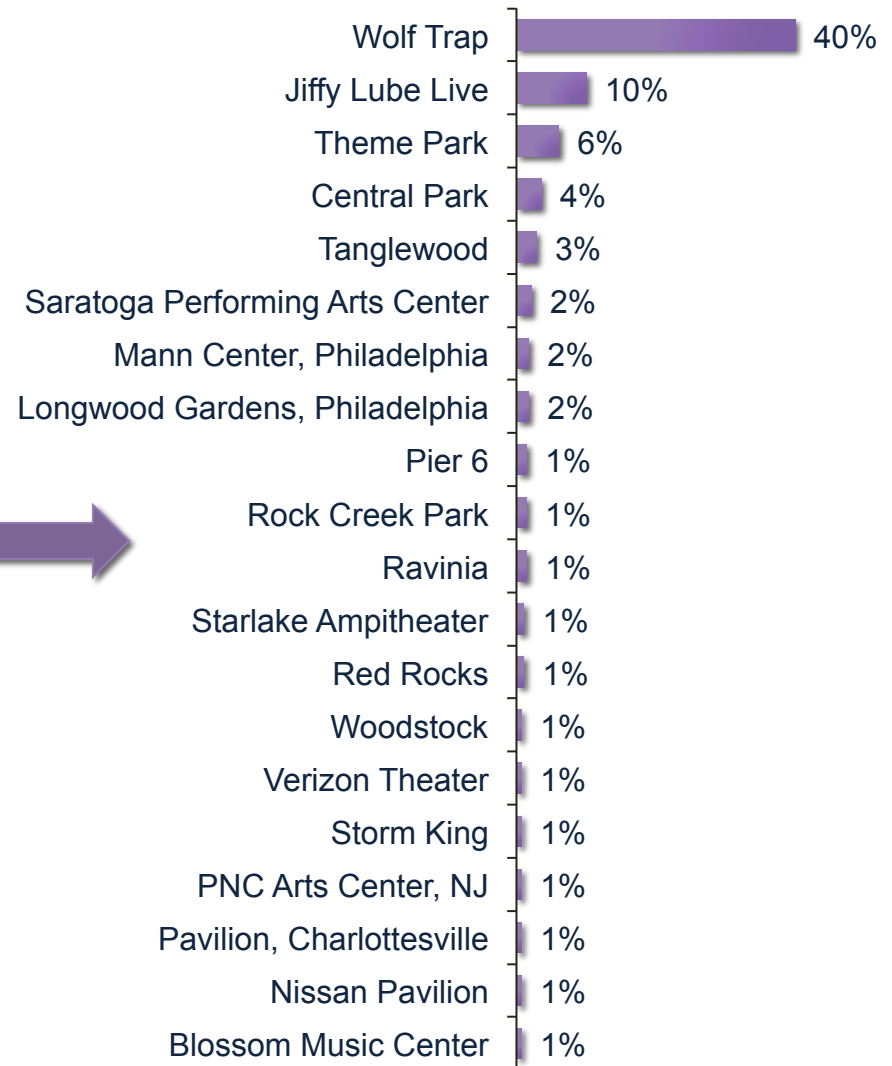
Respondents were asked what venue Merriweather Post Pavilion (MPP) reminded them of and two thirds could not name a venue. Of the 24% that could, half indicated either Wolf Trap (40%) or Jiffy Lube Live (10%), the other major amphitheaters in the region. 6% felt MPP was similar to venues at Disney or Busch Gardens.

The other 44% off the mentions was comprised of 71 venues. The complete list can be found in the appendix.



■ Yes, Specific Venue ■ Yes, Unspecified ■ None

Top 20 Mentions



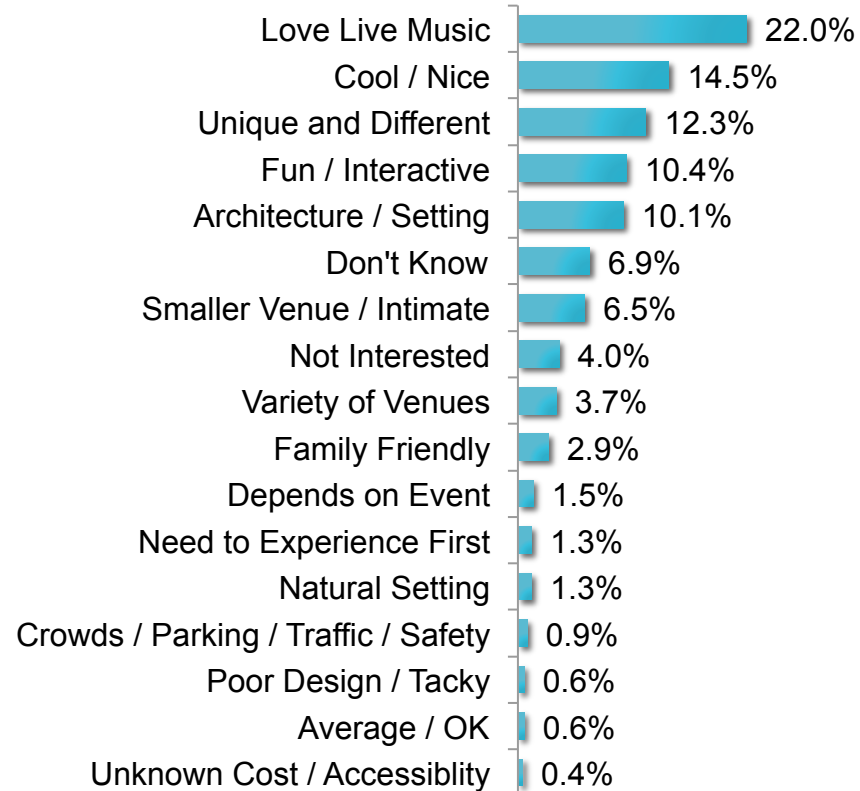
Reasons for Appeal Rating – Black Barn, Loft, and Boom Box



Love of music and the unique features drove appeal of the Black Barn, Loft, and Boom Box.

Almost half of those with low appeal simply stated “not interested” and 20% mentioned crowds or parking. Only a minor few did not like the design.

High Appeal (8-10)



D7. You indicated that the appeal of the Black Barn Theater and Loft and Boom Box is ___. Why did you give that response? [Open end]

Comments on Black Barn, Loft, Boom Box



"Another venue in a beautiful setting to come and see and hear great acts."

"Black Barn Theater looks like an excellent place to hold shows and live concerts and performances, which I am incredibly interested in."

"Cool and Original."



"I like smaller venues for bands, events. I almost don't like going to large venues (like a stadium) for a concert. I like getting up close & personal to bands, etc."

"I like the idea of a middle sized theater in an easily accessible location like Columbia."



"I like the idea of children's shows but it becoming a club at night is kinda weird and I think would create an atmosphere that you wouldn't want in a public park."

"We don't need a club like boom box, would prefer the theatre only."

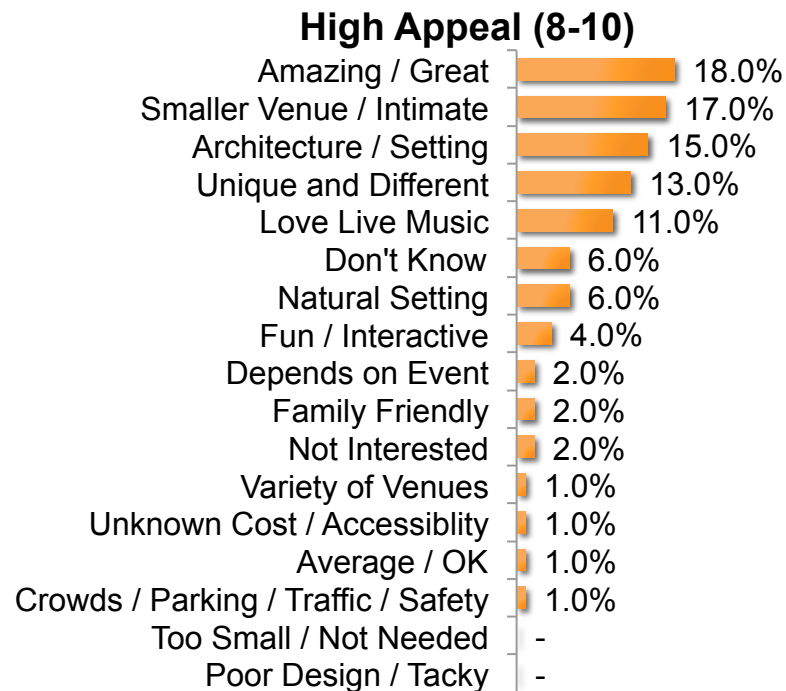


Reasons for Appeal Rating – Chrysalis



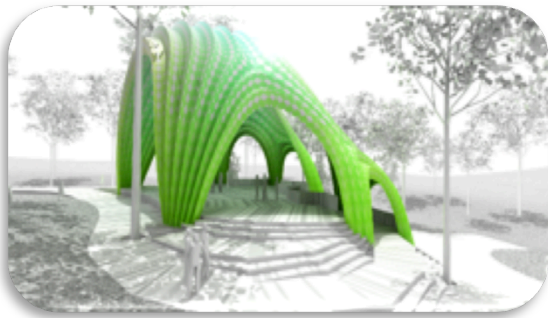
The Chrysalis is such a unique venue that 84% of respondents could not name another venue it reminded them of. Among those that did name a comparable venue, Wolf Trap and the Hollywood Bowl, both outdoor venues, topped the list. The Sydney Opera House was also mentioned, likely due to the similarity in shape.

The unique architecture, smaller venue size, and setting drove appeal of the Chrysalis. However, the design did not appeal to all, with 16% rating the appeal of the Chrysalis low (1-3), saying it was a poor design or was tacky.



D8. You indicated that the appeal of the Chrysalis (smaller outdoor amphitheater) is ___. Why did you give that response? [Open end]

Comments on Chrysalis



“Fantastic shape and architecturally significant... the form follows the function and the setting.”

“Because its unique...though it said it can hold 400 guests, but you can expand that audience by laying out blankets or chairs and spend the day or night away under the trees that's relaxing.”

“Very unique.”

“The Chrysalis has a very interesting design and looks like it would present good acoustics and an interesting atmosphere.”

“Would want to check it out depending on what is there.”

“If there was a specific artist I wanted see there, then I would go, but I generally don't enjoy outdoor concerts.”

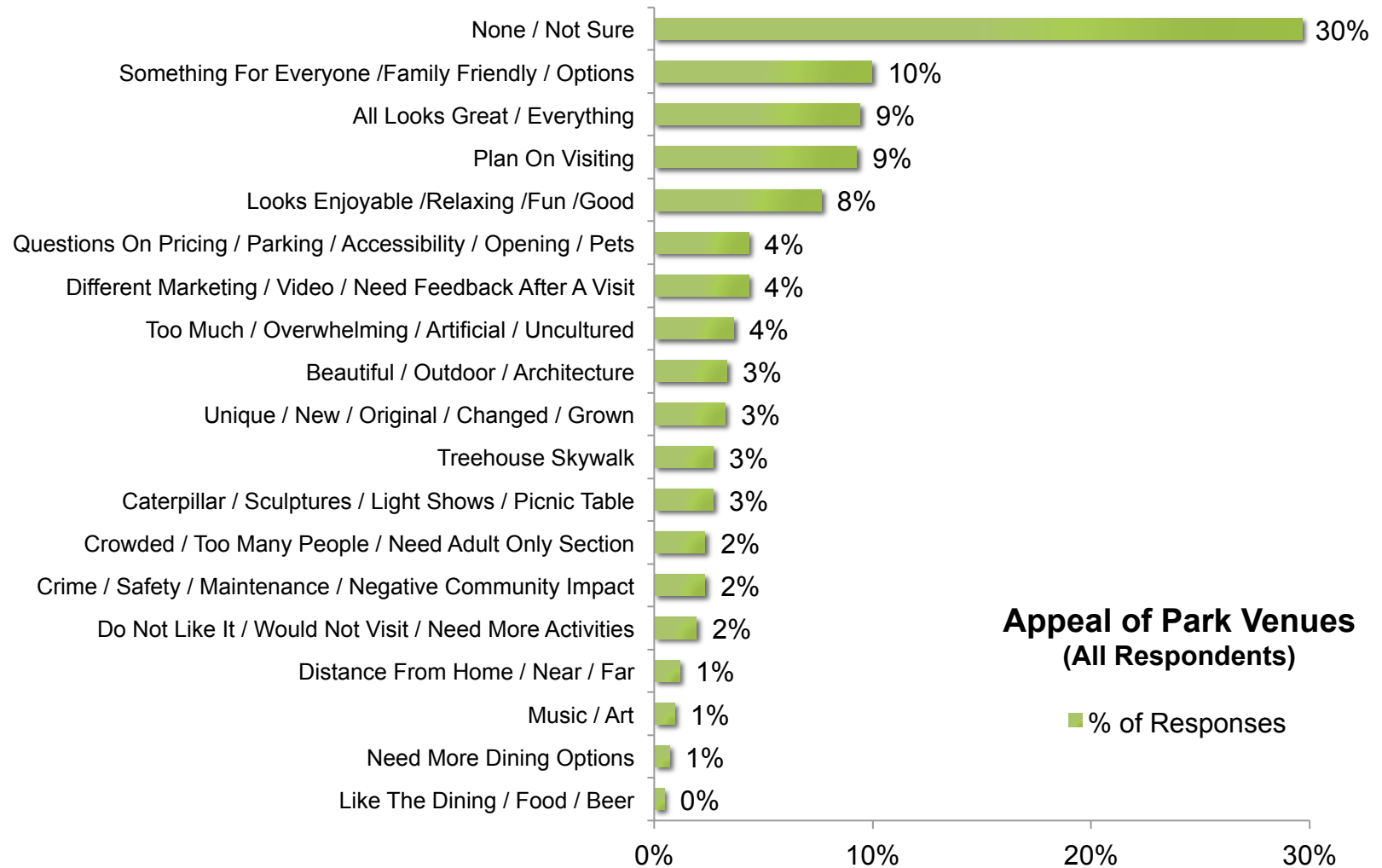
“Not impressed with the design, don't care for the musical venue.”



D8. You indicated that the appeal of the Chrysalis (smaller outdoor amphitheater) is ___. Why did you give that response? [Open end]

Other Feedback on Merriweather Park Venues

When asked for additional feedback on Merriweather Park venues, many could not add to what they had previously cited, but those that did mentioned the variety of activities and family friendly appeal of the venues.

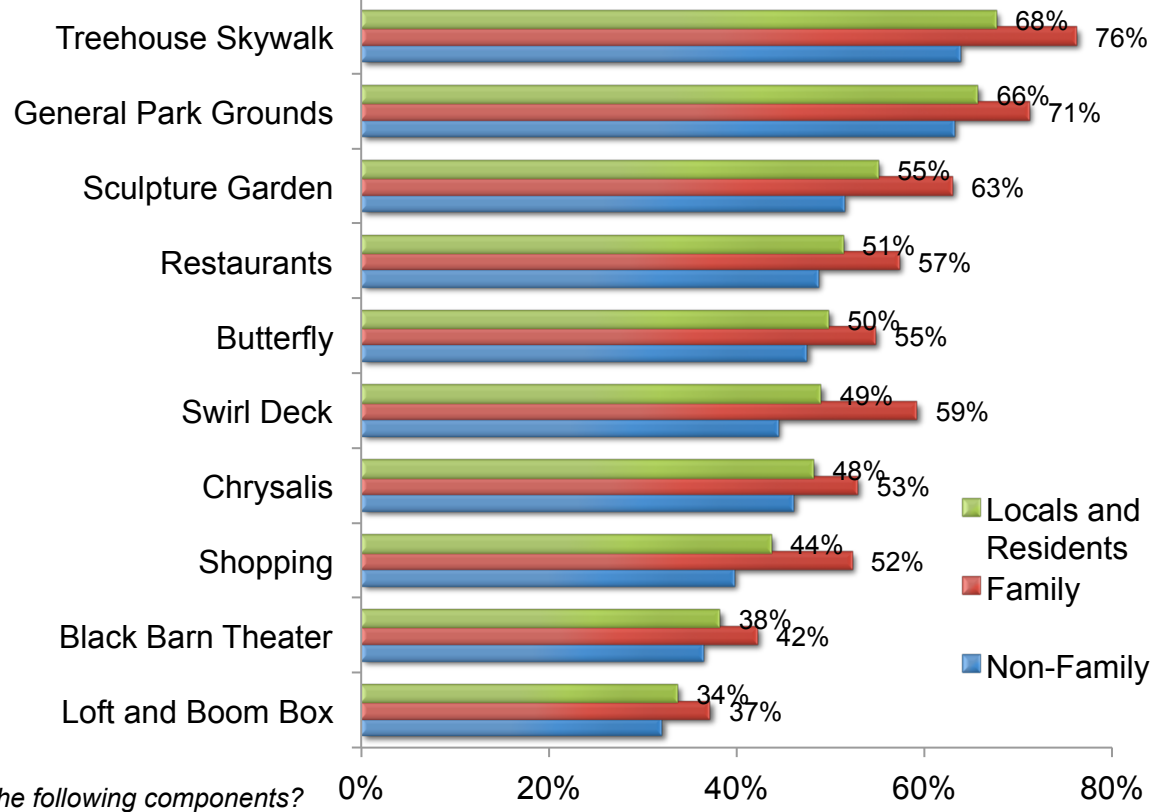


Locals and Residents Drawn to Park Amenities

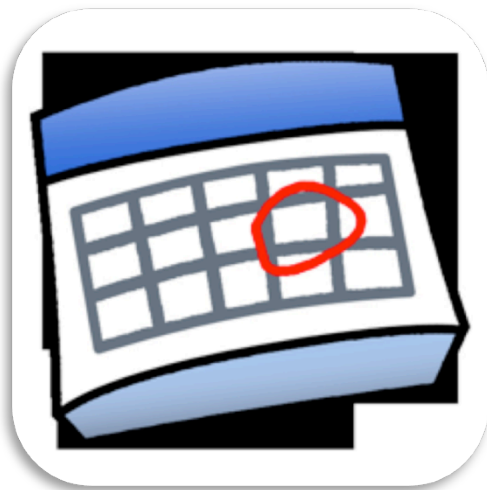


The Park's unique amenities like the Treehouse Skywalk and the General Park Grounds, including the Caterpillar, Merriground, Picnic Table and Merriweather Horns, were the most popular venues among all respondents. Families were the most likely to visit all the components compared to non-families.

**Likelihood to Visit Each Components
Asked of Locals and Residents
(Top 2 Box on 5 Point Scale)**



Frequency of Use – General Park Grounds



Among locals and residents who say they will “definitely” or “probably” use the general Park grounds, nearly half say they will visit “a few times a year.”

However, as is typical in these kinds of studies, respondents are prone to overstatement, indicating a much higher visit frequency than they would actually visit. This overstatement will be addressed in the **Market Sizing and Demand Estimation** section of this report.

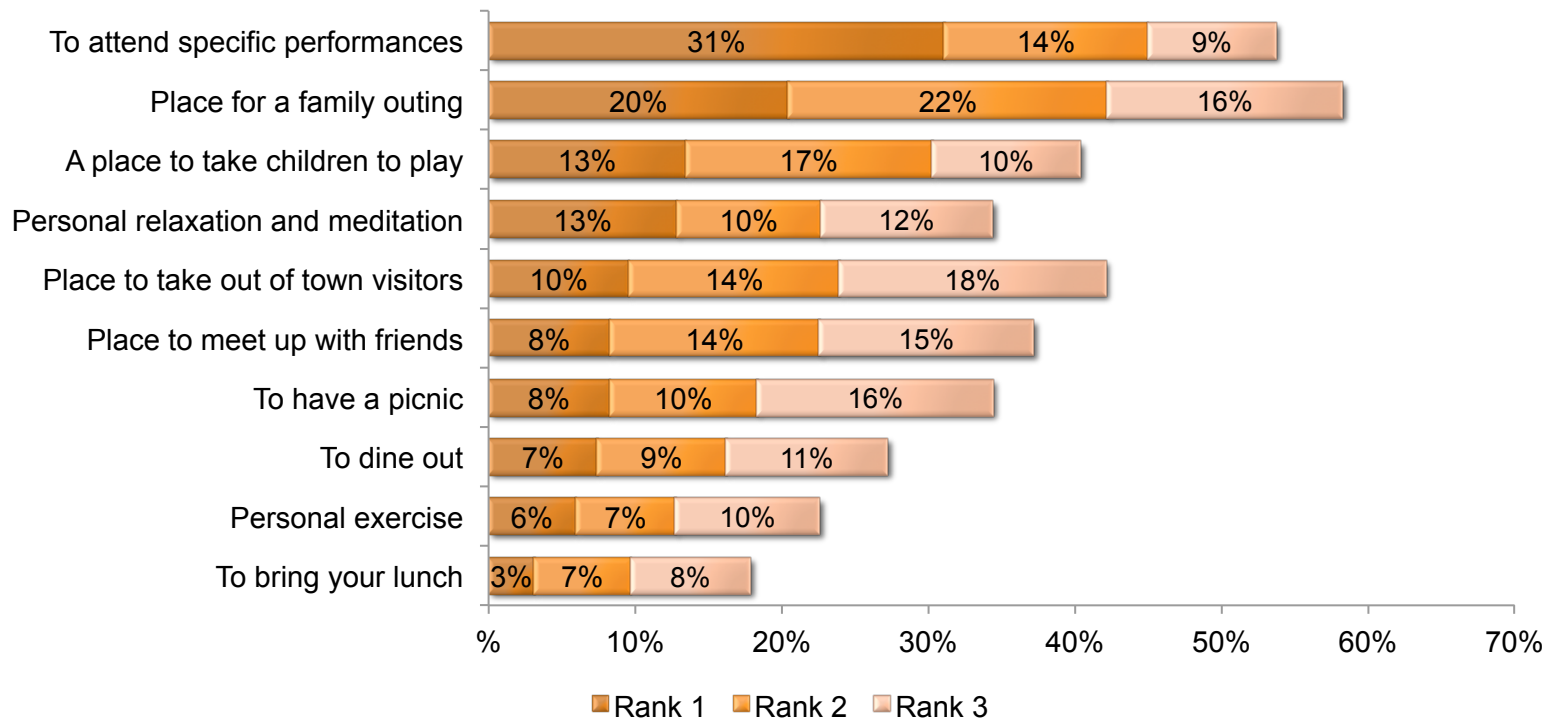
	Locals	Residents	Local and Residents Combined
Daily	1%	1%	1%
A Few Times a Week	3%	1%	1%
Once a Week	12%	1%	3%
A Few Times a Month	19%	5%	9%
Once a Month	19%	13%	14%
A Few Times a Year	38%	53%	49%
Once a Year	5%	20%	16%
Less Than Once a Year	3%	7%	6%
Total	100%	100%	100%



Performances and Outings are the Primary Uses

Merriweather Park at Symphony Woods is mainly seen as a place to attend specific performances, followed by a place for family outings. Interestingly, relatively few mentioned personal exercise as their main reason for going to the Park. Locals were only slightly more likely to say “exercise” versus distant residents (27% vs. 21%). Non-families were much more likely to say “place to meet up with friends.”

How Would You Most Likely Use the Park?
 (Asked of Local and Distant Residents Who Would Visit Merriweather Park at Symphony Woods)



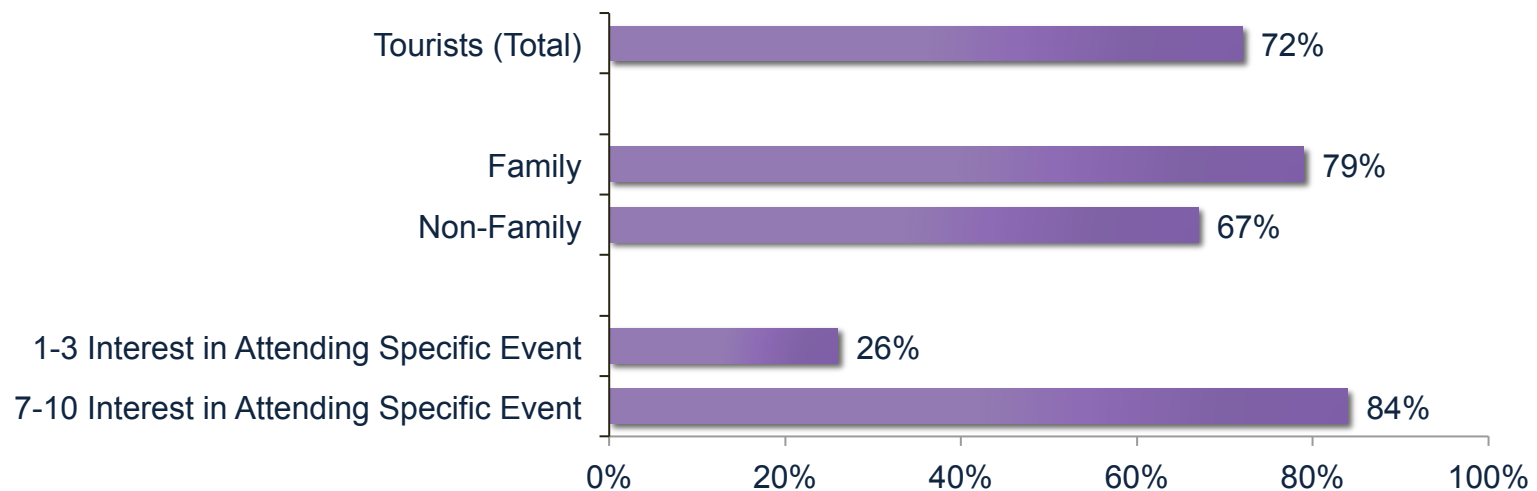
D19b. And how would you most likely use the park? Please rank the 8 most likely ways you would use the park where 1 is most likely, 2 is next most likely, and so on.

Park Drives Interest in Visiting the Area

The addition of Merriweather Park at Symphony Woods would positively impact tourists interested in visiting the Washington / Baltimore area. The strongest interest was among families and those with a high interest in attending specific events at the Park.

Even those with low interest in the Park indicated it would have a positive effect on their interest in visiting. Almost nobody (< 3% across all segments, including those with 1-3 interest in visiting the Park) indicated it would make them less interested in visiting.

Impact on Interest in Visiting Washington D.C. /Baltimore More Interested

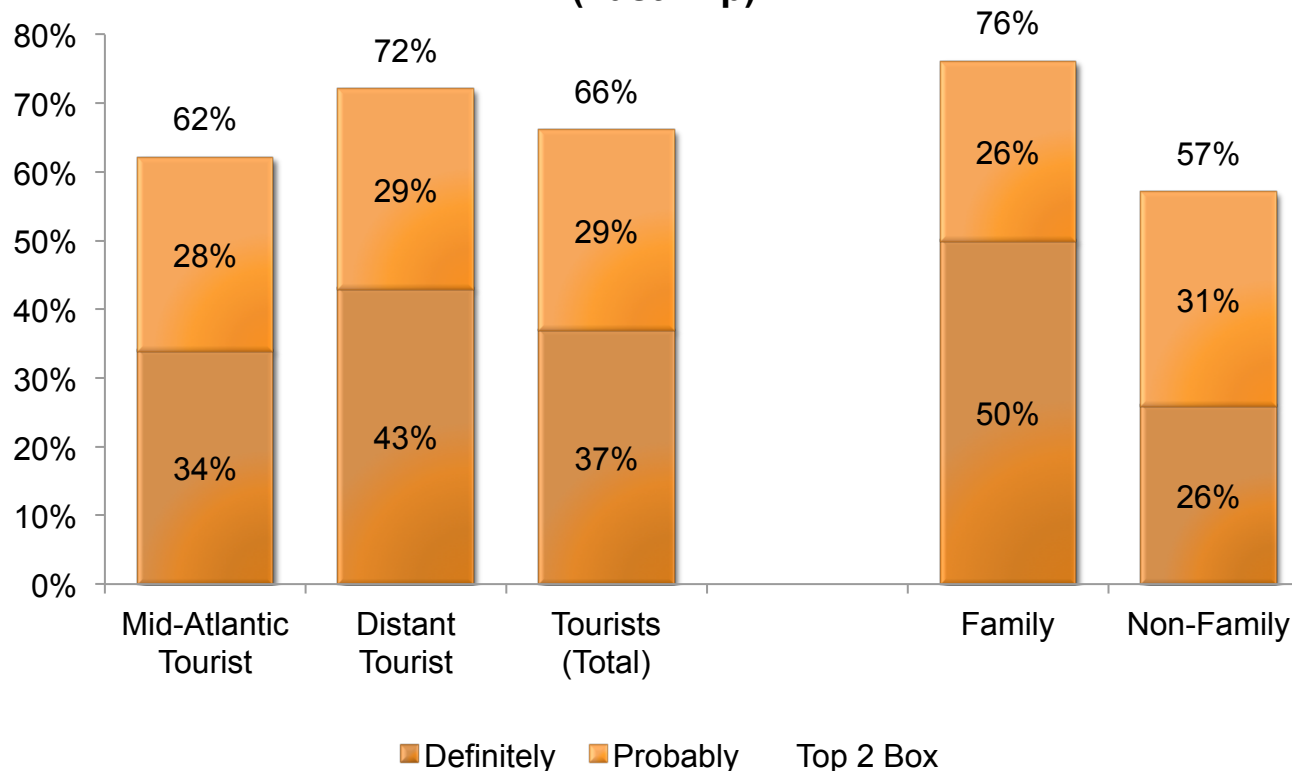


D22: If Merriweather Park at Symphony Woods were to open in the near future, how would it affect your interest in visiting the Washington D.C./Baltimore area? Merriweather Park would ...

Interest in Visiting the Park is High Among Tourists

Interest in visiting is highest among distant tourists and families, with 72% of distant tourists and 76% of families indicating they definitely or probably would have visited Merriweather Park at Symphony Woods if it were open and they were aware of it.

Interest In Visiting Merriweather Park if it were Open (Last Trip)



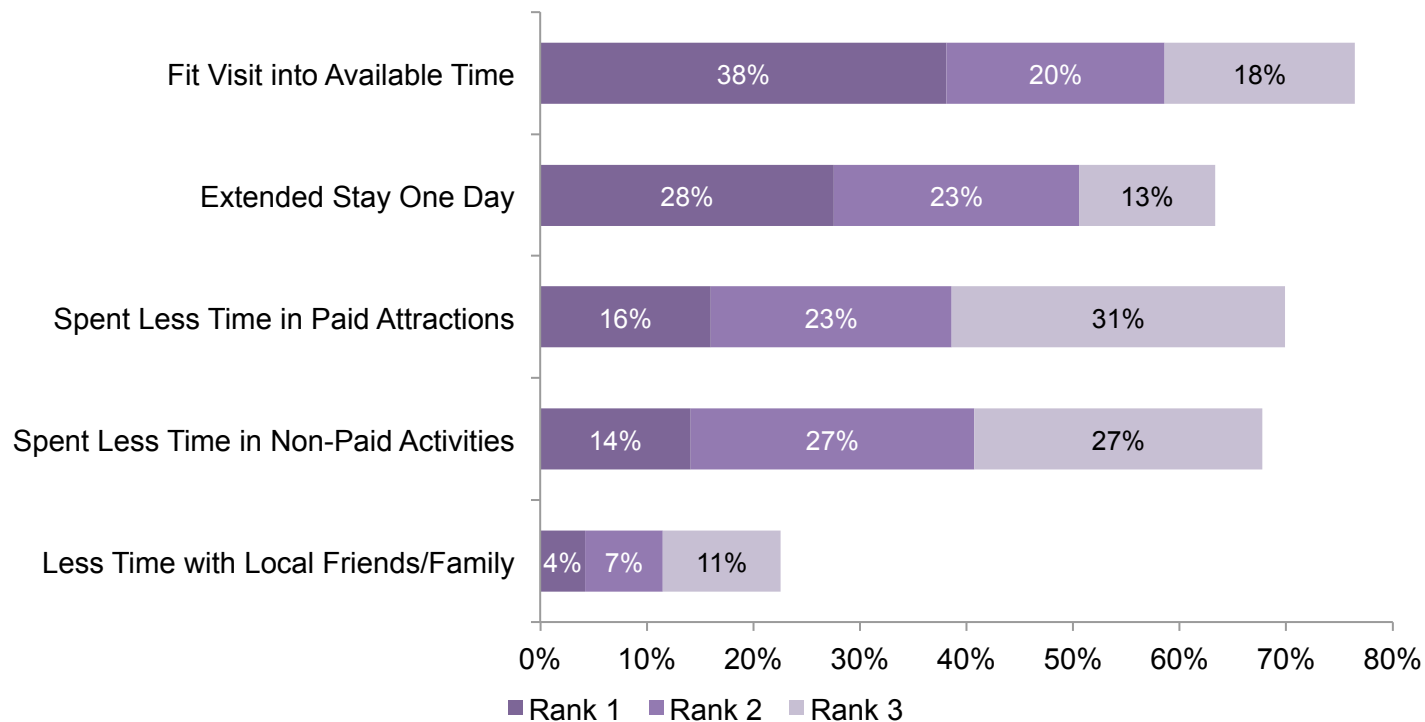
D23. If you were aware of Merriweather Park at Symphony Woods on your last trip to the Washington D.C./Baltimore area, based on this description, would you have visited?

How to Fit in a Visit to the Park?

For those respondents who said they “definitely would,” “probably would,” or “may or may not” have visited on their last trip, 38% said they would fit the visit into available time. Families were almost equally likely to say they would extend their trip one day.

Impacting length of stay is challenging. It is likely that tourists will either fit it into available time or make trade-offs with other activities.

**If Visited on Last Trip,
Which Would Have Occurred**



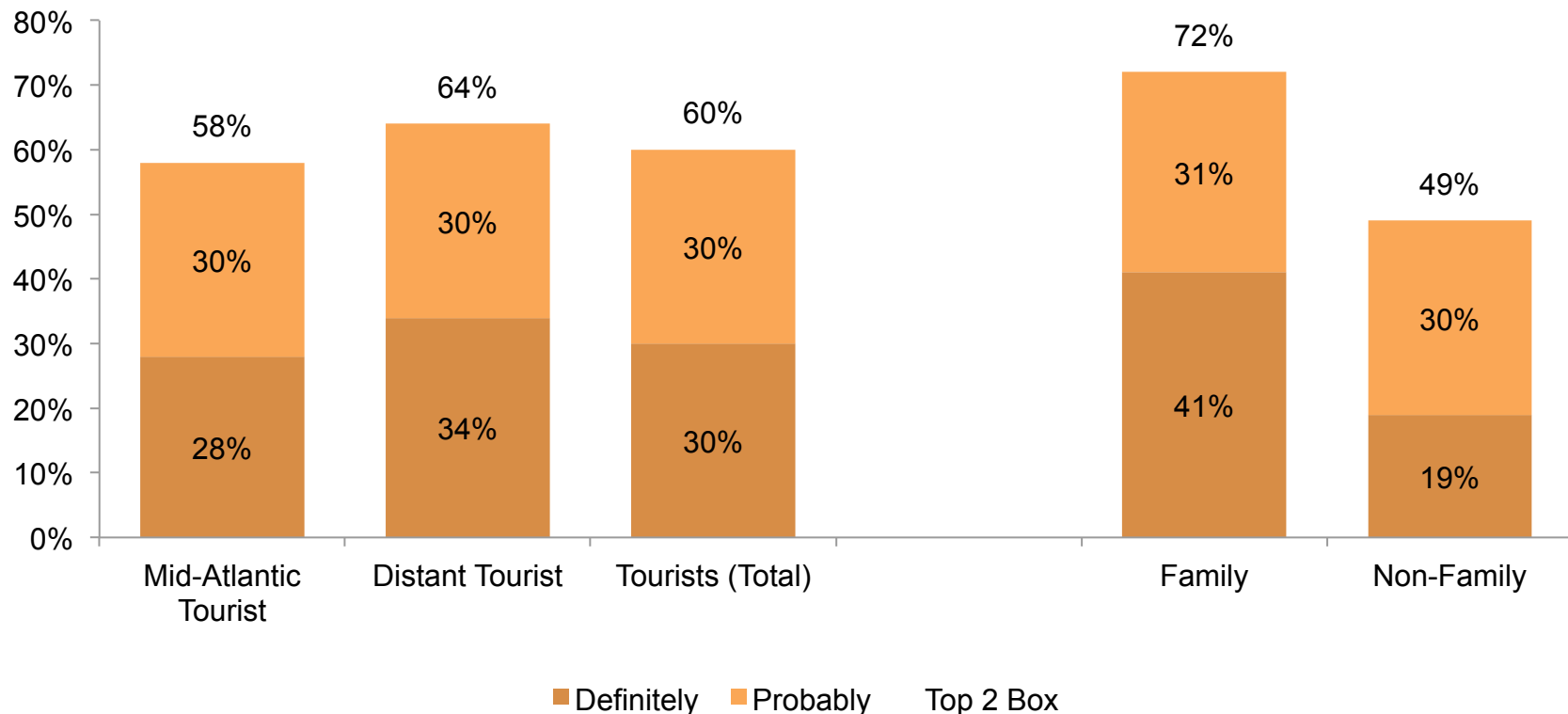
D24: If you had visited Merriweather Park on your trip to the Washington D.C./Baltimore area, which of the following would most likely have occurred?

Stated Inducement is High

Almost 50% or more indicated they definitely or probably would plan a special trip to Washington D.C. / Baltimore to visit Merriweather Park at Symphony Woods.

This level of interest is quite strong, particularly among families who realize the Park is a place for people “like them” and are looking for activities the entire family can enjoy together.

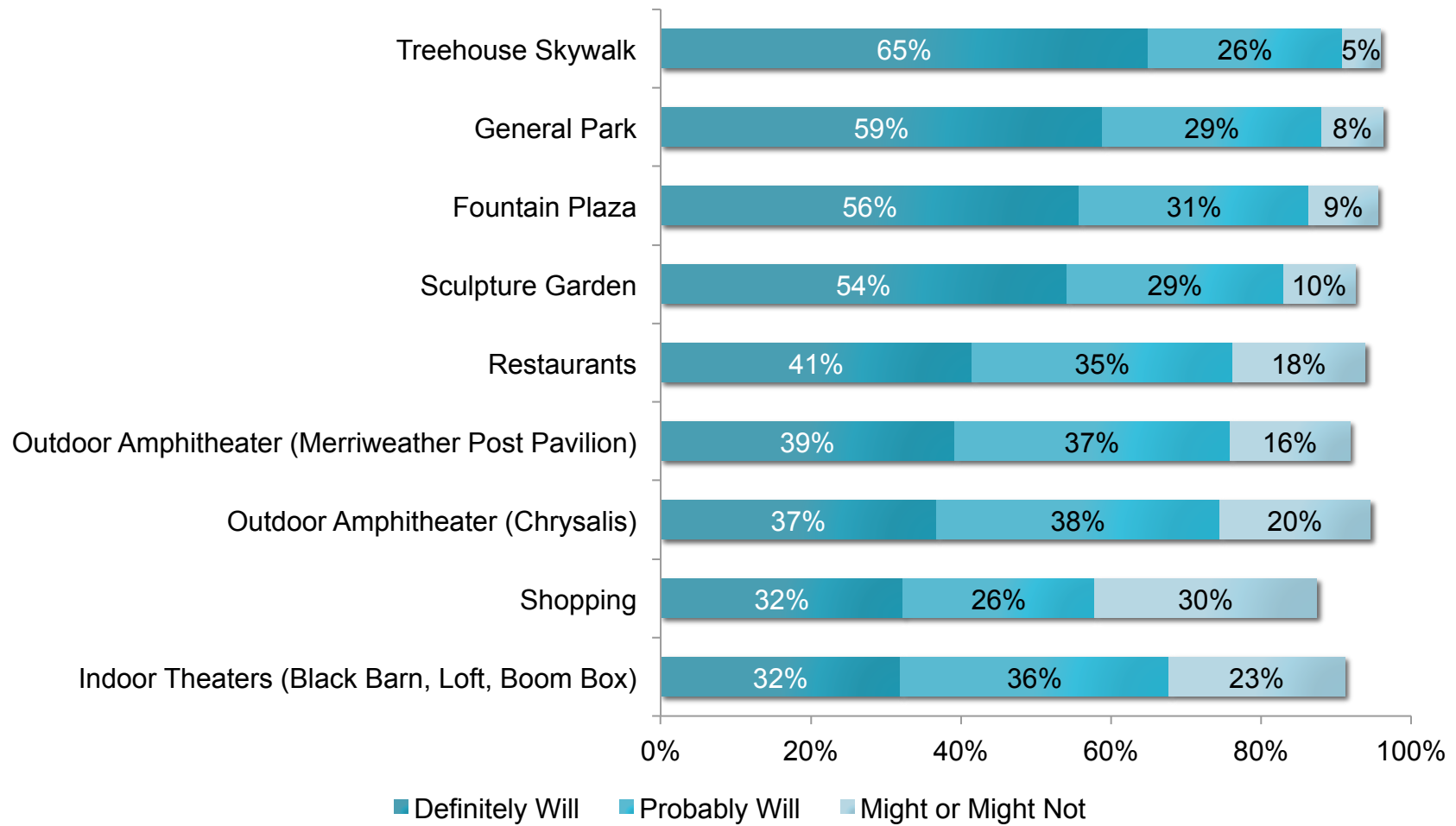
Likelihood to Plan a Special Trip to Washington D.C. / Baltimore to Visit (Tourists)



D25. Based on this description of Merriweather Park at Symphony Woods, how likely would you be to plan a special trip to the Washington D.C./Baltimore area to visit this venue?

Unique Venues Are Driving Interest

Similar to locals and residents, the venues that most resonated with tourists who definitely or probably would make a special trip to Washington D.C. / Baltimore were the Treehouse Skywalk and the General Park amenities like the Caterpillar, Picnic Table, and Merriground. The venues that are the least differentiated from what they have in their local area fell to the bottom (e.g., theaters, shopping, etc.)



D26. How likely would you be to visit each of the following components of Merriweather Park on a future trip?

Additional Information Needed Before Visiting

While four in ten said they do not need additional information before deciding whether to visit, those that do would like more detail on the price of admission, the policy in case of inclement weather, parking, and entertainment schedules.



Information Desired For Decision to Visit	%
Admission Costs / Weather Policies	26%
Parking / Transportation	10%
Hours of Operation / Entertainment Schedules	10%
Directions / Location / Nearby Attractions	3%
Crowds	2%
Safety and Cleanliness	2%
Hotels / Accommodations	2%
Park Layout & Size / Accessibility	2%
Restaurants / Menus	2%
Policies (Pets, Liquor, etc.)	1%
Completion Date	1%



D18: What else would you like to know about Merriweather Park at Symphony Woods before deciding to visit?