

MERRIWEATHER PARK  
AT SYMPHONY WOODS



PRODUCT  
RESEARCH AND  
DEMAND STUDY



integrated *insight* inc.  
*management consulting*

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# Summary of Findings

Merriweather Park at Symphony Woods is perceived to be a unique offering with many different venues and features to appeal to a variety of needs and tastes. Prospective visitors find the variety of activities and the outdoor setting that invites exploration to be most appealing.

- While all Park venues generate strong appeal, the Treehouse Skywalk, Fountain Plaza, and Picnic Table lead the pack.
- Many (45%) could not list something they did not find appealing. However, the most frequently mentioned negatives were related to distance, access, crowds, and parking.

The target market for Merriweather Park at Symphony Woods is 30 million individuals comprised of locals, residents, and tourists. The qualified target has interest in or has participated in live performance events or outdoor activities, and if tourists, have visited Washing D.C./Baltimore in the past two years.

- Provided there is a consistent schedule of appealing acts booked at performance venues, Merriweather Park at Symphony Woods can expect attendance of 2.5M annually. This attendance includes visitors who are coming to the Park for a specific event, feature, or offering – not those passing through several times a week (i.e. runners or dog walkers).

Merriweather Park at Symphony Woods is mainly seen as a place to attend specific performances, followed by a place for family outings. With an enviable location between two major cities - Baltimore and Washington, D.C. – the Park is positioned well to capture additional tourist spend.

- Given tourists to the Washington D.C./Baltimore area are highly likely to be repeat visitors (80%) with a car (84%), with a compelling reason to visit, easy access, and parking, Merriweather Park could give these repeaters something new and different to experience.
- Nearly 70% of locals host out of towners at least once per year, and usually accompany them to places they recommend. Building advocacy among locals will be a key success factor as they significantly influence the activities of their guests.



# Summary of Findings

While most people expect to pay for professional performances, only half expect to pay for local groups.

- Distant tourists are more likely to expect to pay for general admission to the Park or for attraction-like experiences (Treehouse Skywalk and Sculpture Garden). Most locals expect everything to be 'free.'

Rental space could help generate ongoing revenue.

- Merriweather Park at Symphony Wood could attract some significant event business from Locals and Residents. Venues attracting the most interest include the Butterfly, Fountain Plaza, and Chrysalis.

And, if you ever wondered what it means to be in a **Merriland** state of mind, the answer is MERRY, HAPPY, and FREE among other good-feeling words.



A silver ballpoint pen with a perforated grip is positioned diagonally on the right side of the slide. To its left, there are three checkboxes: the top one is checked with a dark line, and the two below it are empty. A solid purple horizontal bar is located at the top of the slide.

# BACKGROUND AND METHODOLOGY

# Background and Objectives



Merriweather Park at Symphony Woods is an arts and cultural destination park located in the planned community of Columbia, Maryland. Symphony Woods has long served the region as the park ground surrounding Merriweather Post, but has far more potential than is being realized. The plan for Merriweather Park at Symphony Woods calls for a new kind of cultural park where the landscape itself will become the setting for the arts, culture, and civic uses.

In addition to Merriweather Post Pavilion and three theatrical venues, the Park will offer the Chrysalis outdoor amphitheater, sculpture and botanical gardens, Fountain Plaza, unique park amenities like the Caterpillar, the Picnic Table, and Merriground, The Treehouse Skywalk taking elevated guests to art and craft studios, as well as interpretive classrooms, new dining venues, and artist studios.

Primary demand research was conducted to:

- Size the market.
- Determine what aspects of the concept are most and least appealing and why.
- Measure appeal and likely visitation to the destination among four distinct audiences.
- Understand expected spending.
- Determine the interest and appeal of holding special events at Park venues.
- Project attendance for the performance venues and the Park itself.



# Research Methodology

An online survey was conducted between May 23 – June 13, 2014. Qualified U.S. candidates residing in designated geographic areas based on distance from Merriweather Park at Symphony Woods were included in the study. A total of 1,000 surveys were completed.

- 120 **LOCALS** defined as living within 10 miles of the location.
- 389 **RESIDENTS** defined as living within 11-50 miles of the location.
- 327 **MID-ATLANTIC TOURISTS** defined as those living in the Mid-Atlantic states and who have visited the Washington D.C./Baltimore area within the last two years. Mid-Atlantic states include NY, NJ, PA, DE, MD, VA, WV, and Washington D.C.
- 164 **DISTANT TOURISTS** defined as living in other states and who have visited the Washington D.C./Baltimore area within the last two years.

All respondents who completed the survey met the following criteria:

- Between the ages of 21 and 65.
- 7-10 interest in, or participation within the last 12 months in at least one of: outdoor concerts, outdoor festivals, live theater, music, or dance performances, local/state/national park outings, museum or art gallery visits, or sculpture garden visits.
- Not employed in sensitive occupations such as live entertainment, local government, media, advertising or public relations, or development and construction.

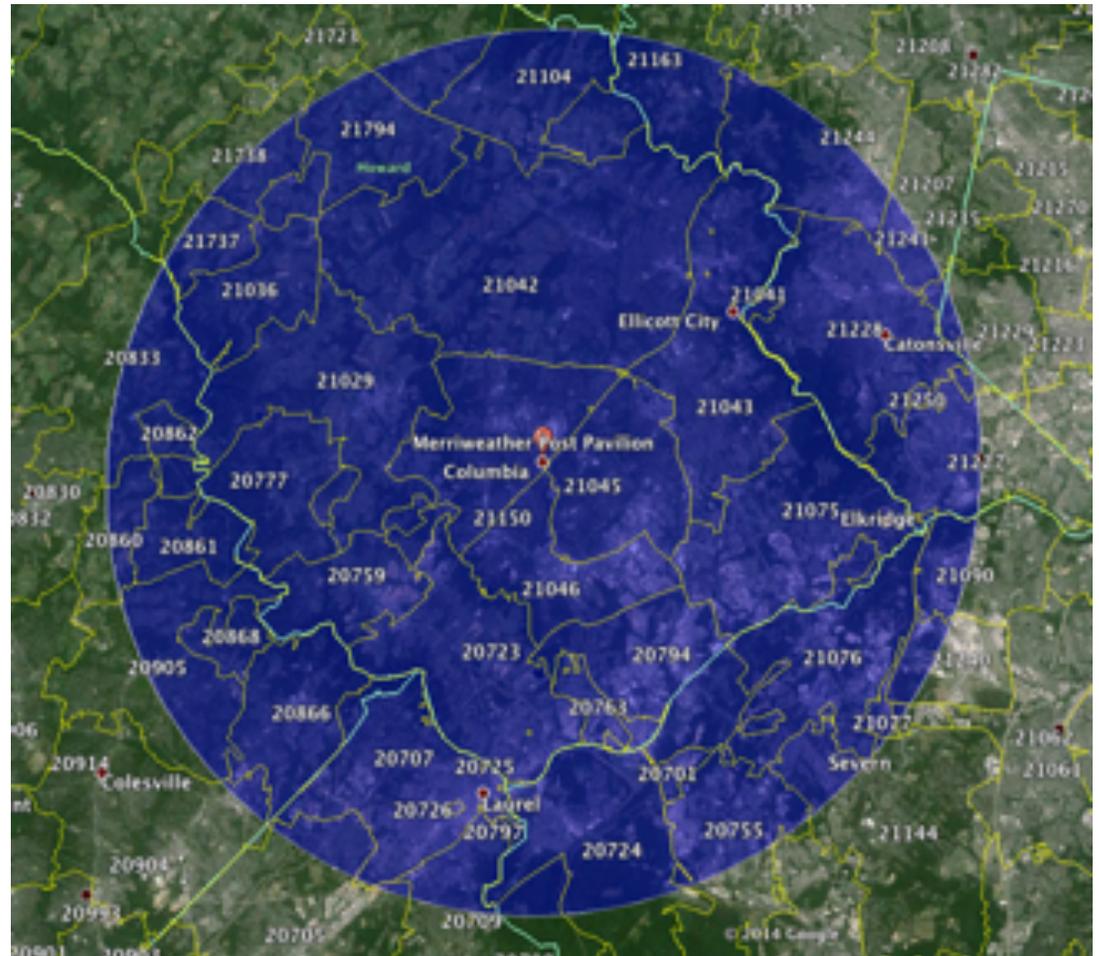
The complete concept description that was tested is included in the Appendix.



# Geographic Designations

The four designations in use (Locals, Residents, Mid-Atlantic Tourists, Distant Tourists) are defined by geographic boundaries. The total population is about 316 million.

The **local** area is within 10 Miles of Merriweather Park at Symphony Woods and mainly includes zip codes starting with 210, 207, 205 and 202.



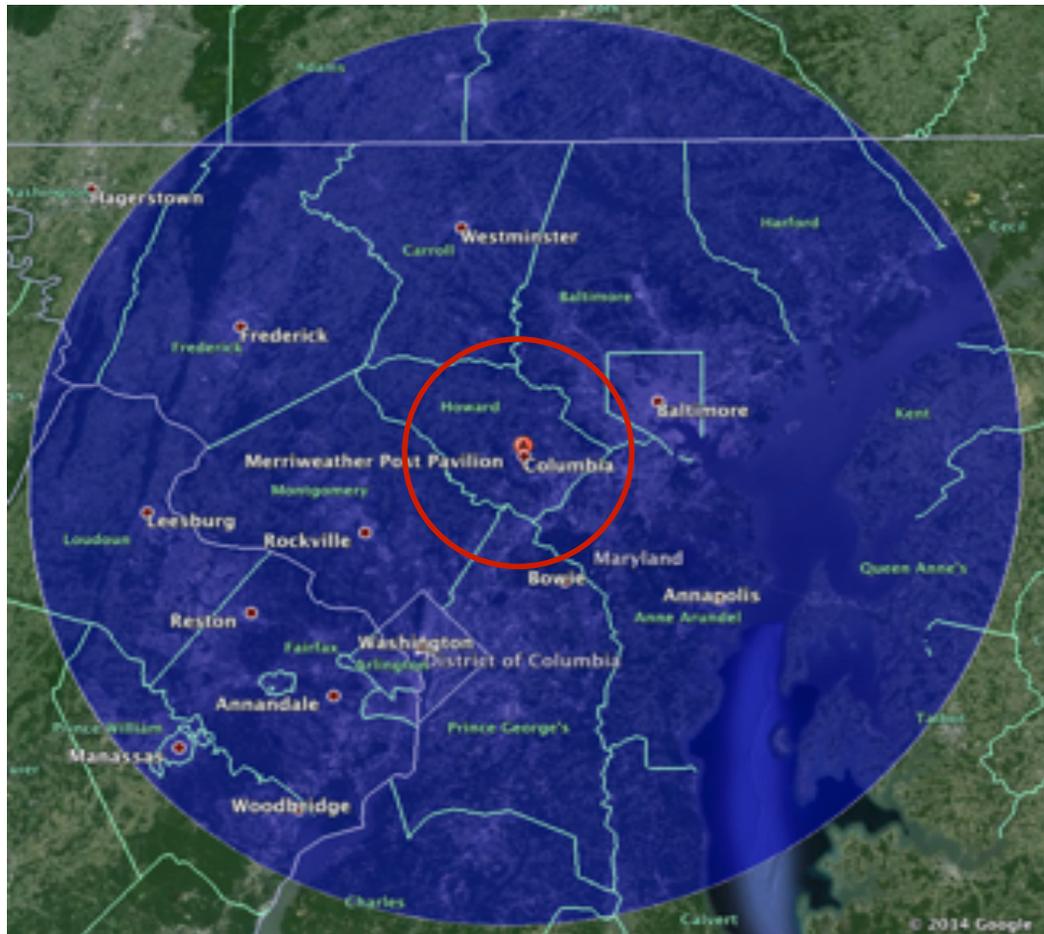
Respondent	Population (Millions)
Local	0.5
Resident	7.5
Mid-Atlantic Tourist	50.9
Distant Tourist	257.2
Total	316.1



# Geographic Designations

The **Resident** area is between 11 and 50 Miles from Merriweather Park at Symphony Woods and **Mid-Atlantic Tourist** area includes the states of NY, NJ, PA, MD, WV, VA, DE, and Washington D.C.

**Resident area**



**Mid-Atlantic area**



# Respondent Profile / Demographics

Comparing demographics of the respondents by segment highlights some notable differences:

- Locals were the most affluent of the groups, with 63% earning over \$100K annually.
- Tourists (both Mid-Atlantic and Distant) had a higher mix of families.
- Distant tourists skewed younger with fewer people over 50 visiting Washington D.C. / Baltimore.

Respondent Demographics					
	Total	Locals	Residents	Mid-Atlantic Tourists	Distant Tourists
HHI <\$50k	21%	11%	21%	26%	24%
HHI \$50k - \$99k	39%	26%	37%	43%	47%
HHI \$100k - \$149k	24%	35%	25%	21%	18%
HHI \$150k - \$199k	9%	19%	10%	7%	5%
HHI \$200k+	7%	9%	8%	4%	5%
Age 21 - 35	33%	35%	31%	31%	40%
Age 36 - 50	34%	29%	33%	34%	37%
Age 51 - 65	33%	36%	36%	35%	23%
Family	39%	30%	27%	42%	56%
Non-Family	61%	70%	73%	58%	44%
Married	67%	67%	61%	73%	68%
White	78%	78%	74%	83%	78%
Asian	9%	12%	11%	7%	7%
Black	9%	8%	11%	6%	9%
Other	4%	2%	4%	4%	6%



MID-ATLANTIC AND DISTANT TOURISTS  
PAST TRAVEL TO  
WASHINGTON D.C. AND BALTIMORE

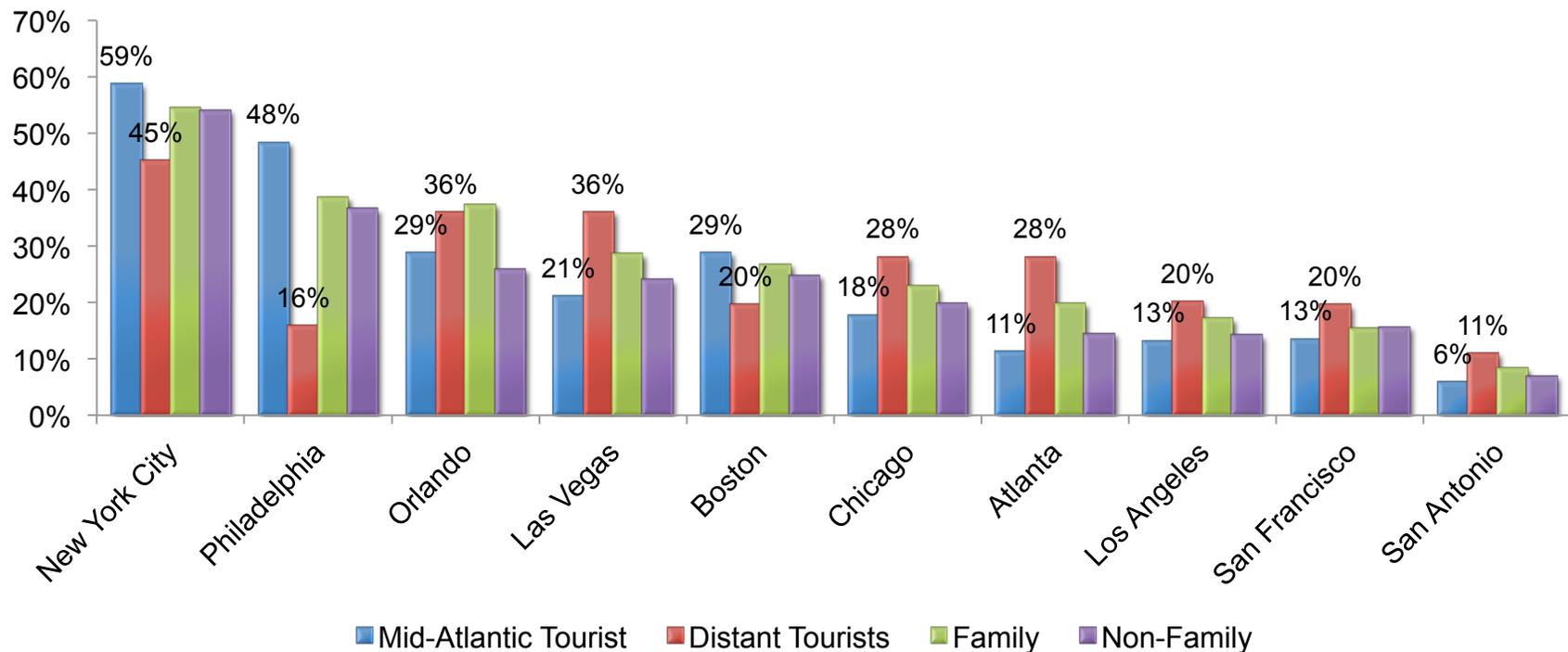


# Surveyed Tourists are Well-Traveled

Tourists in the survey are well-traveled, with the average tourist visiting 2.5 of the cities listed in addition to Washington D.C. / Baltimore.

- Mid-Atlantic tourists were most likely to have visited New York City and Philadelphia.
- Distant tourists were more likely to have visited New York City and Orlando.

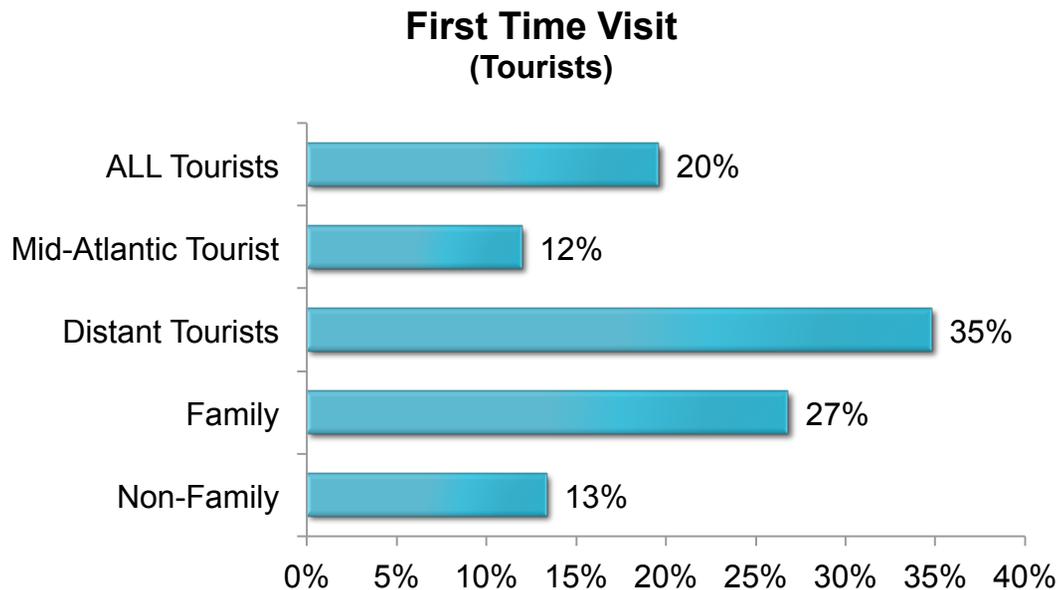
**Cities Visited in Last Two Years  
(Tourists)**



QA9: Which of the following destinations have you visited for a vacation or short get-away in the last 2 years? (Multiple Responses Allowed)  
 Note: Visitation to Washington D.C. / Baltimore in the last two years was a requirement of the survey and therefore 100%.

# Washington D.C. / Baltimore is Highly Repeatable

The Washington D.C. / Baltimore area has a relatively high repeat visitation rate, with 80% of tourists having visited previously. Mid-Atlantic tourists and non-family groups were the groups most likely to have been before.



## INSIGHT

Most tourists to Washington D.C. / Baltimore are repeat visitors.

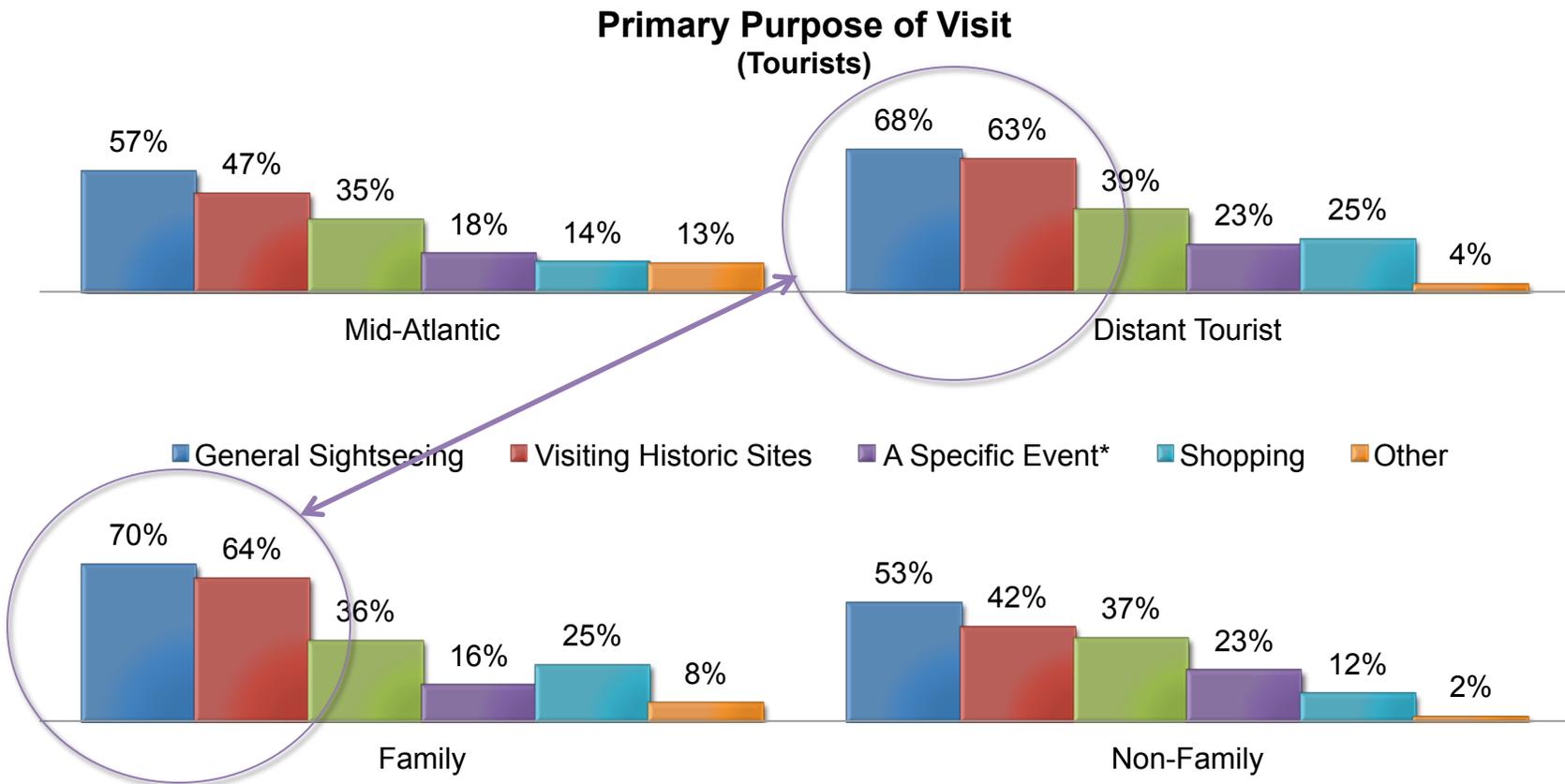
## IMPLICATION

Repeat visitors are the most likely to be looking for activities outside of the “must see” attractions first-timers hope to experience.



# Sightseeing and Historical Sites Drive Visits

General sightseeing and visiting historical sites are the top two reasons people visited Washington D.C. / Baltimore. This is particularly true among distant residents and families, which both had higher first-time visitation rates (35% and 27%, respectively).

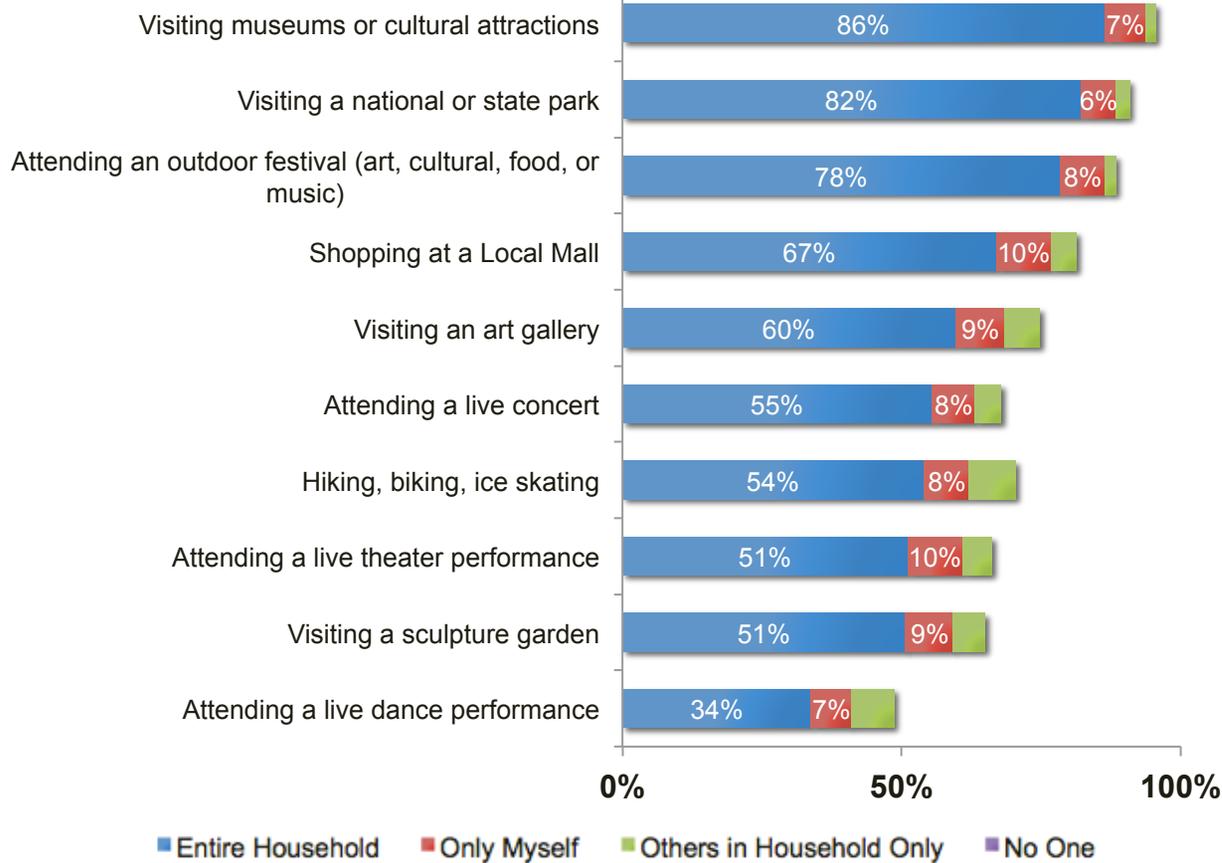


\* A specific event includes wedding, reunion, etc.  
 B6b. What was the primary purpose of your trip? (Multiple Responses Allowed)

# Returning Tourists Likely to be Busy

If they return to the Washington D.C. / Baltimore area, tourists indicate they will most likely continue visiting museums and cultural attractions followed by state and national parks. Responses were very similar for Mid-Atlantic and Distant tourists.

**Participation on Return Trip  
(Tourists)**



## INSIGHT

Tourists are mostly looking for cultural attractions, outdoor venues, and festivals on their next visit to the area. Merriweather Park at Symphony Woods clearly fits the bill.

## IMPLICATION

Succinctly getting the Park's message to future visitors, and enabling enough time to plan around specific events, can help boost attendance.



B20: If returning to the Washington D.C./Baltimore area, how would you best describe your participation in each of the following?

# Vehicle Access is High

Automobiles are the primary mode of transportation to the Washington D.C. / Baltimore area for 73% of tourists. More than 8 in 10 Mid-Atlantic tourists drive to the area, while 52% of distant tourists drive. Once in-market, over half of distant residents who didn't drive rented a car.

After accounting for rental cars, tourist access to a car increased to 87% for Mid-Atlantic tourists and 78% for distant tourists. Family access was even higher at 90%

Mode of Travel to Washington D.C. (Tourists)				
	Mid-Atlantic Tourists	Distant Tourists	Family	Non- Family
Mode of Transportation				
Drove	83%	52%	76%	70%
By Train	10%	2%	7%	8%
Flew	4%	45%	17%	18%
Other	3%	1%	0%	5%
% of Those Who Didn't Drive That Rented a Car	27%	54%	60%	31%
Total With Car Access	87%	78%	90%	79%

## INSIGHT

84% of tourists have access to a car while in market.

## IMPLICATION

Tourists have the ability to visit Columbia, but will need good access, parking, and a compelling reason to visit.



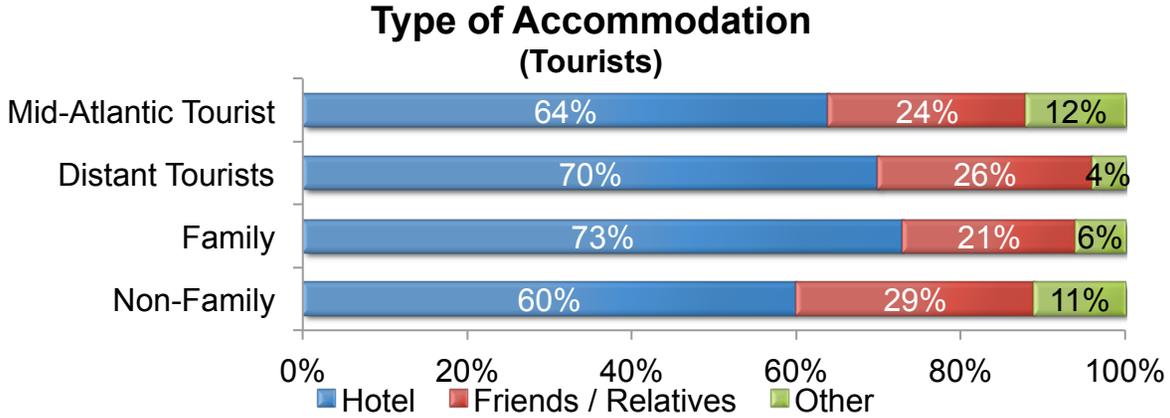
QB2: How did you travel to the Washington D.C./ Baltimore area?  
QB3: Did you have a rental car in the area?

# Hotels are the Predominant Accommodation



Not unlike many tourist destinations, almost 70% stayed in a hotel. This is fairly consistent across all segments, although non-family tourists were slightly more likely to stay with friends or relatives.

Length of stay differed significantly by geography. Distant tourists stayed an average of 4.6 nights, similar to other drive-oriented tourist destinations, while mid-Atlantic tourists stayed only 2.6 nights. This is likely influenced by Mid-Atlantic tourists being able to take shorter duration trips.



<b>Average Length of Stay - Nights (Tourists)</b>	
Mid – Atlantic Tourist	2.6
Distant Tourist	4.6
Family	3.4
Non-Family	3.1



QB5: Where did you stay?  
QB4: How many nights did spend in the area?

# Travel Party

Between 43% and 49% of tourists were traveling with children in their party.

Organized tours represented a relatively small percentage of travel parties. Of those surveyed, organized travel groups (non-bus) were the predominant group type followed by middle and high school groups.

- Of the eleven respondents in tour groups, 4 were organized travel groups (non-bus), 3 were middle/high school groups, 2 were social/fraternal/religious groups, and 1 each for elementary school group and a bus tour.

Travel Party Composition (Tourists)				
	Mid-Atlantic Tourists	Distant Tourists	Family	Non-Family
Spouse / Significant other	74%	71%	81%	64%
Children	43%	49%	76%	13%
Friends	17%	14%	13%	19%
Parents	7%	20%	12%	11%
Extended Family Members	10%	14%	9%	13%
My grandchildren	2%	3%	3%	2%
A Larger, Organized Group or Tour	2%	3%	2%	3%
None of the above	1%	0%	0%	1%



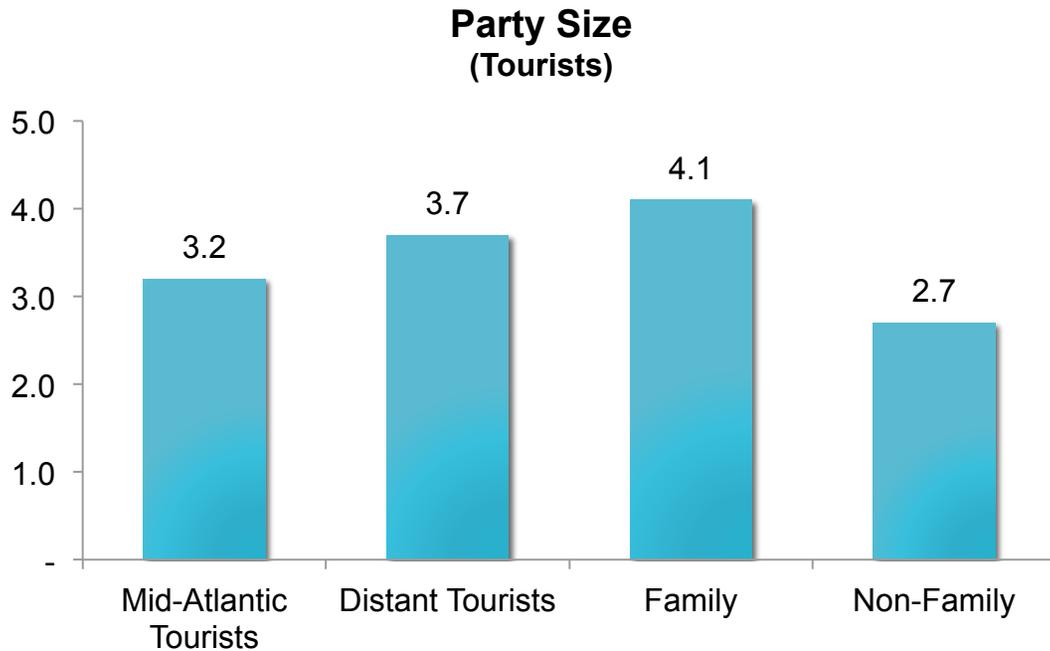
B6: Who accompanied you on this trip? (Multiple Response).

B6a: If larger, organized group checked in B6: What type of larger group were you with?

# Party Size



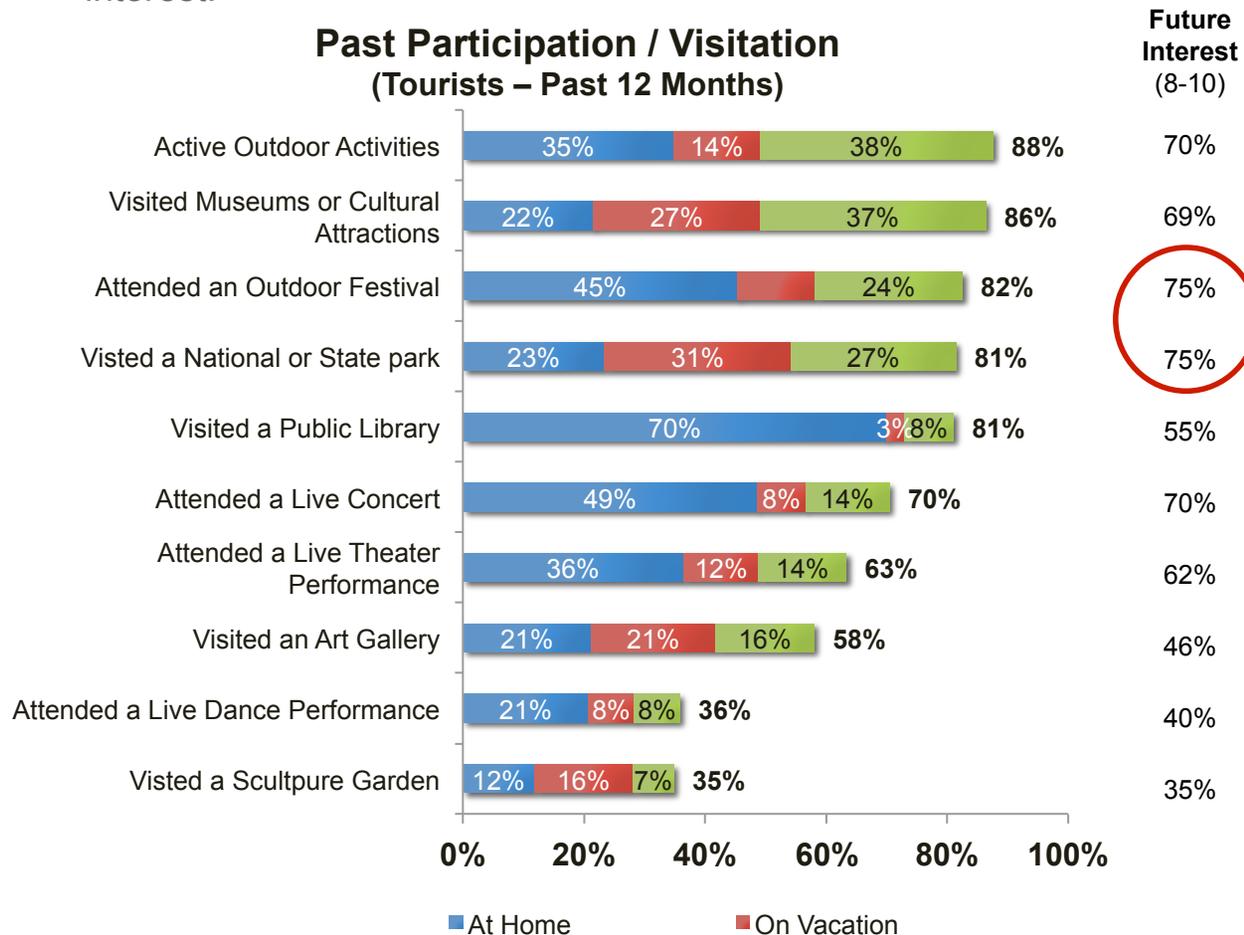
Party size averages 4.1 for families and 2.7 for non-families. Mid-Atlantic tourists have a higher mix of non-family (58% versus 44%), which is driving the difference between regions.



*B5a: Including yourself, how many people were in your immediate travel party? Just include your immediate party, not a larger tour group if on a tour.*

# Past Participation and Future Interest

Participation for tourists, whether at home or on vacation, during the past 12 months was highest for visiting museums or cultural attractions and engaging in active outdoor activities. However, visiting a national or state park or an outdoor festival had the strongest interest.



## INSIGHT

Tourists like the experiences the Park will offer. They participate in outdoor, cultural and festival activities today, and have high interest in continuing to do so.

## IMPLICATION

Merriweather Park at Symphony Woods is well positioned to be the “one stop shop” for these interested consumers. Once they understand all there is to see and do, repeat visitation should be high, particularly if festivals continue to build year over year.

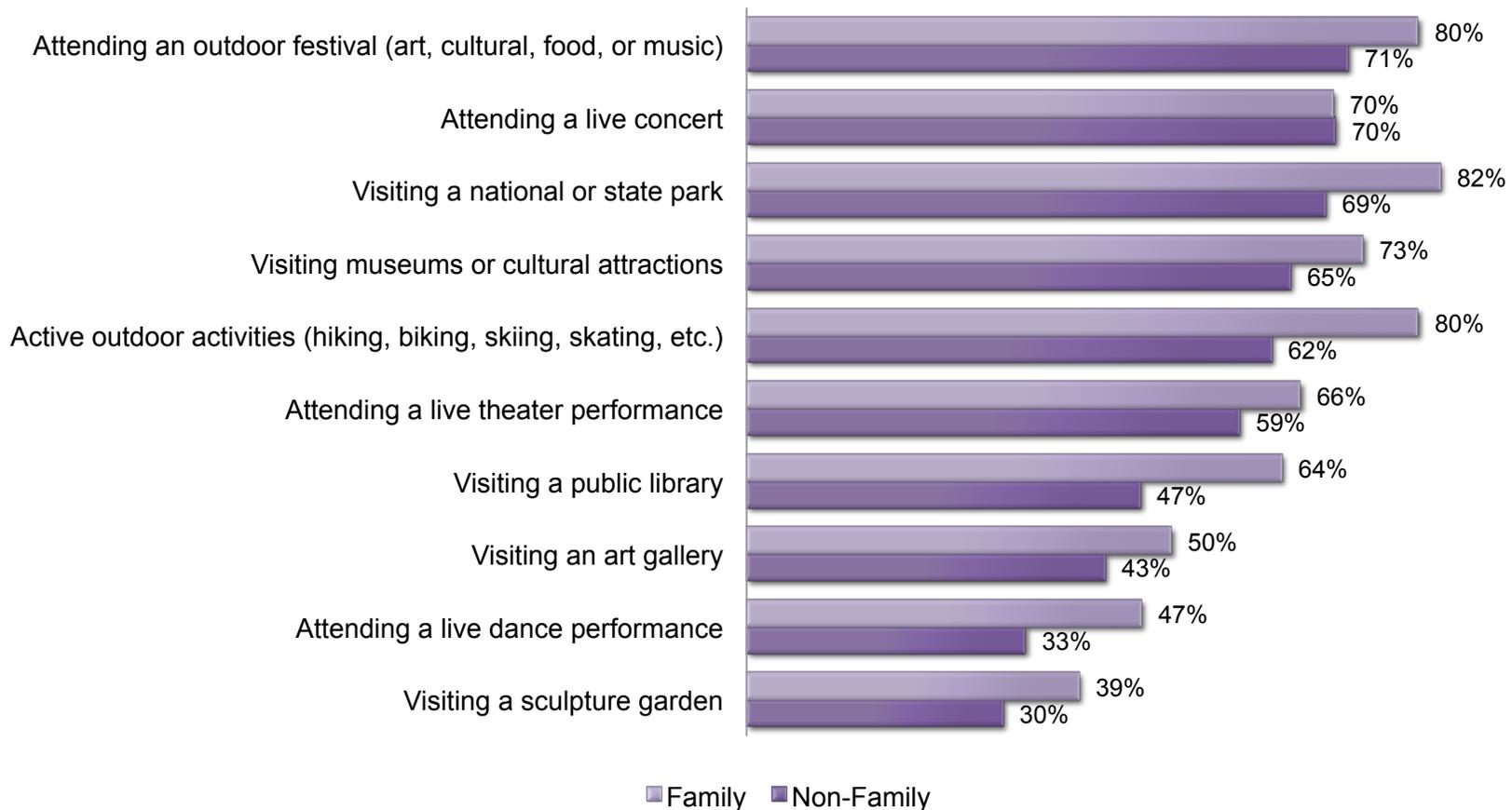


A7: In the past twelve months, in which of the following activities have you or someone in your household participated? Please indicate if you participated in the activity while at home, on vacation, both or not at all  
 A8: How interested are you personally in each of the following activities?

# Families Are More Interested in Activities

Tourist families have a higher interest in participating in activities vs. non-families in almost all cases. The one exception is live concerts where the two groups have similar interest.

## Interesting Participating in Activities (Tourists: 8-10 Interest on 10-Point Scale)

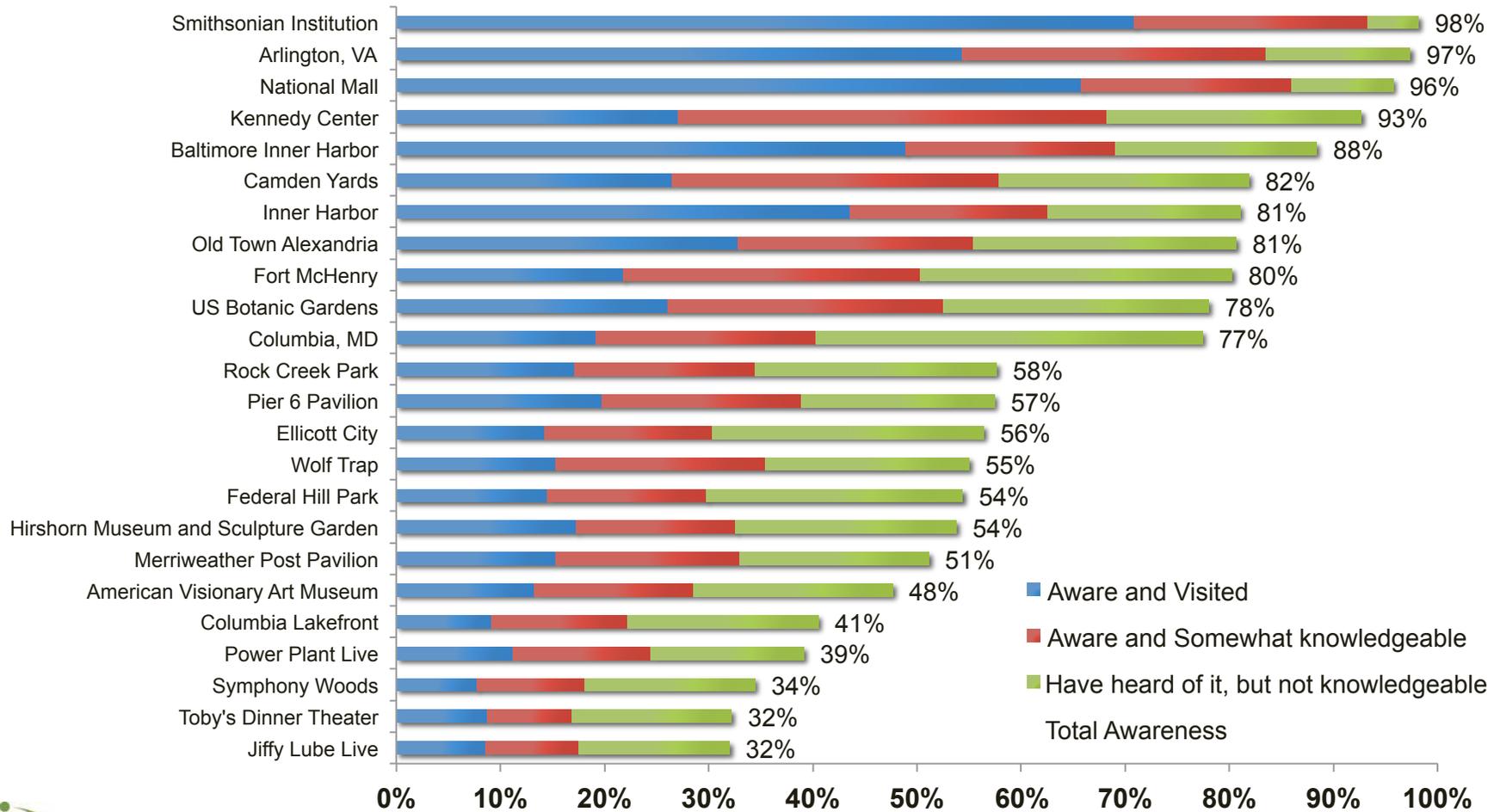


A8. How interested are you personally in each of the following activities?

# Tourist Awareness of National Venues is High

Awareness among tourists is high for the big nationally and internationally recognized attractions (e.g., the Smithsonian Institution), but drops considerably for the smaller venues that tend to serve a more local or regional audience.

**Awareness and Past Visitation  
(Tourists)**



B19: Please indicate your familiarity with each of the following.

# There is a lot to do in Washington D.C. / Baltimore

Consistent with the purpose of visit, sightseeing and visiting museums and monuments topped the list of activities in which tourists participated. Attending outdoor festivals and live performances ranked relatively low. However, these are not primary drivers of visits.

Activities Participated In While Visiting Washington D.C. / Baltimore				
	Mid-Atlantic Tourists	Distant Tourists	Family	Non-Family
Sightseeing	80%	86%	85%	79%
Dining	77%	85%	81%	78%
Visited Museums	67%	79%	79%	64%
Visited Monuments	59%	80%	72%	62%
Shopping	46%	65%	60%	46%
Visited an Art Gallery	24%	37%	32%	24%
Attended an Outdoor Festival (Art, Cultural, Food, Music)	20%	28%	33%	14%
Hiking, Biking, Skating	13%	21%	20%	11%
Attended a Professional Sporting Event	14%	13%	15%	12%
Paid for a Private Tour	6%	15%	14%	5%
Attended a Live Theater Performance	6%	13%	11%	6%
Attended a Concert	7%	9%	10%	6%
Attended a Live Dance Performance	3%	5%	5%	3%



B13: What all did you do on this trip to Washington D.C./Baltimore? (Multiple Responses Allowed)

# Performances Attended

Among those who attended a concert, theater, or dance performance, only 40% could recall the specific act or performance they saw. An additional 26% knew where the event was held, but couldn't recall the show. The remaining 35% couldn't recall the specific location or event, but some knew the type of event or venue where it was held.



## Performances Attended

### Specific Performances

4th of July Concert (4%)  
 Paul McCartney (3%)  
 Washington Ballet (3%)  
 Baltimore Philharmonic Orchestra  
 Black Gold  
 Bruno Mars  
 Cats  
 Cherry Blossom Festival  
 ComedySportz  
 Dave Matthews Band  
 Hits Deep Tour - 1st Mariner Arena  
 Francophone Festival  
 Hotwater Music/The Menzingers - 9:30 Club  
 Jazz Festival

Jersey Boys  
 Journey  
 Washington National Opera - Kennedy Center  
 Hip Hop Dance Festival - Kennedy Center  
 Rihanna  
 The Nutcracker Ballet - Community College  
 Cinderella - Ulney Theater U2  
 Vanya, Sonia, Masha and Spike  
 Video Games Live  
 Pearl Jam  
 West Side Story  
 Yundi Li

### Specific Location

Kennedy Center (5%)  
 National Mall (5%)  
 National Theater (5%)  
 9:30 Club (3%)  
 Baltimore Arena  
 Lincoln Theater  
 Shakespeare Theater  
 Smokey Joe's Café  
 Theater on Kennedy Drive  
 Verizon Center



B14: What Concert, Theater or Dance Performance did you attend (coded open end).  
 \* All Performances and Locations represent 1.3% of responses unless otherwise noted.

# Mall in Columbia Popular with Tourists



Shopping is a popular activity among tourists, especially distant tourists and families where 25% of each segment indicated it was a primary purpose of their trip. On average, they visited 2.6 of the listed shopping locations compared to 1.8 for Mid-Atlantic tourists and non-families.

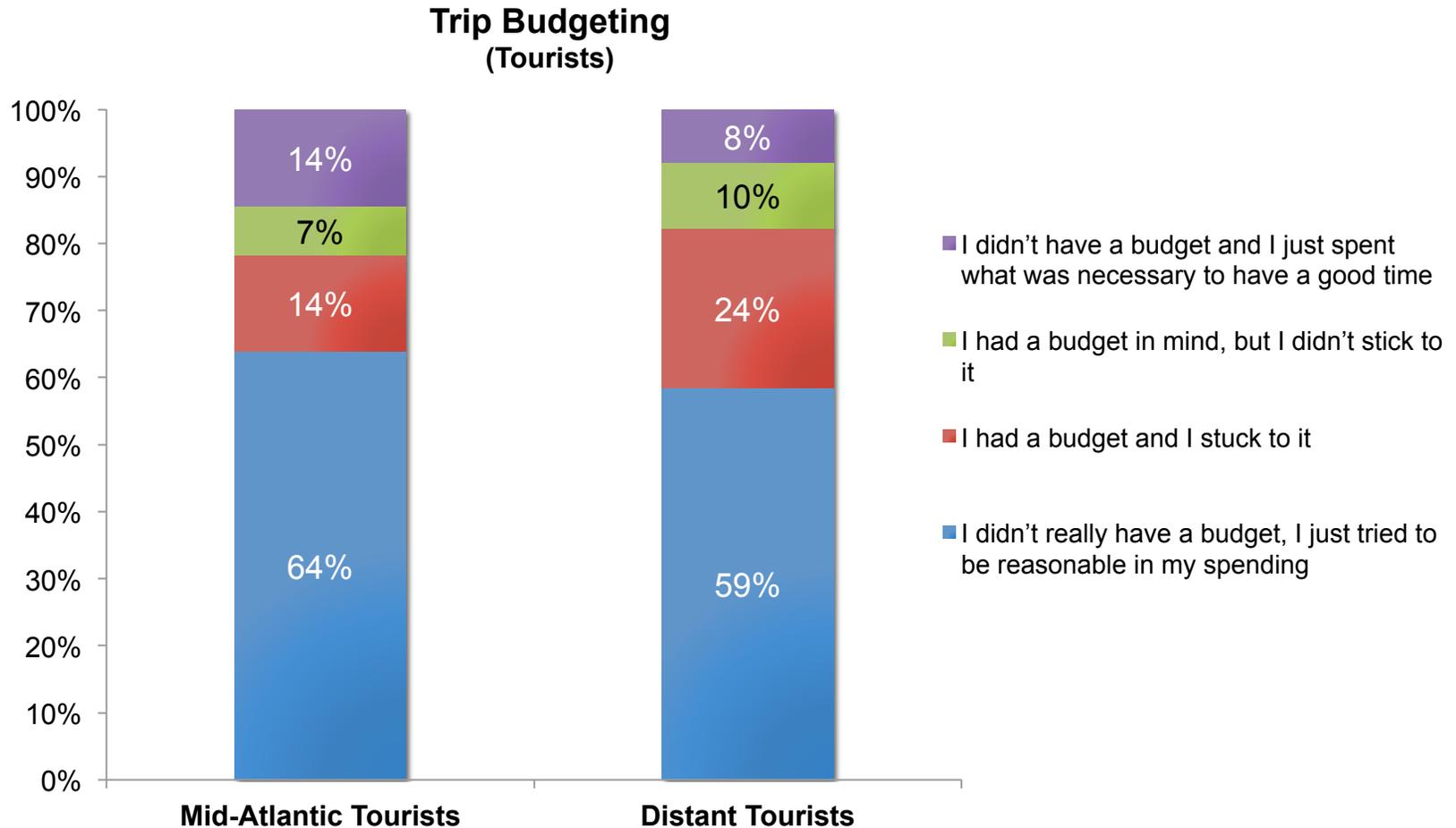
Top locations were downtown Washington D.C. and Georgetown, but these are comprised of multiple shops spread out over a large area. The two most popular specific shopping locations were Inner Harbor and the Mall in Columbia.

Shopping Locations Visited (Tourists)				
	Mid-Atlantic Tourists	Distant Tourists	Family	Non-Family
Downtown Washington	57%	71%	66%	59%
Georgetown	34%	51%	43%	40%
Inner Harbor	39%	25%	38%	28%
The Mall in Columbia	19%	36%	30%	21%
The Towson Town Center	11%	16%	15%	10%
Chevy Chase Pavilion	9%	19%	18%	7%
Arundel Mills Mall	5%	20%	14%	8%
Owing Mills Mall	7%	13%	14%	4%
Mazza Gallerie	4%	10%	10%	2%
Average # of Locations Visited	1.8	2.6	2.5	1.8



# Trip Budgeting

The majority of tourists don't have a fixed budget in mind, but try to make wise choices about spending. Distant tourists were more likely to have a set budget they stick to versus Mid-Atlantic Tourists (25% vs. 15%). There was no difference between families and non-families.



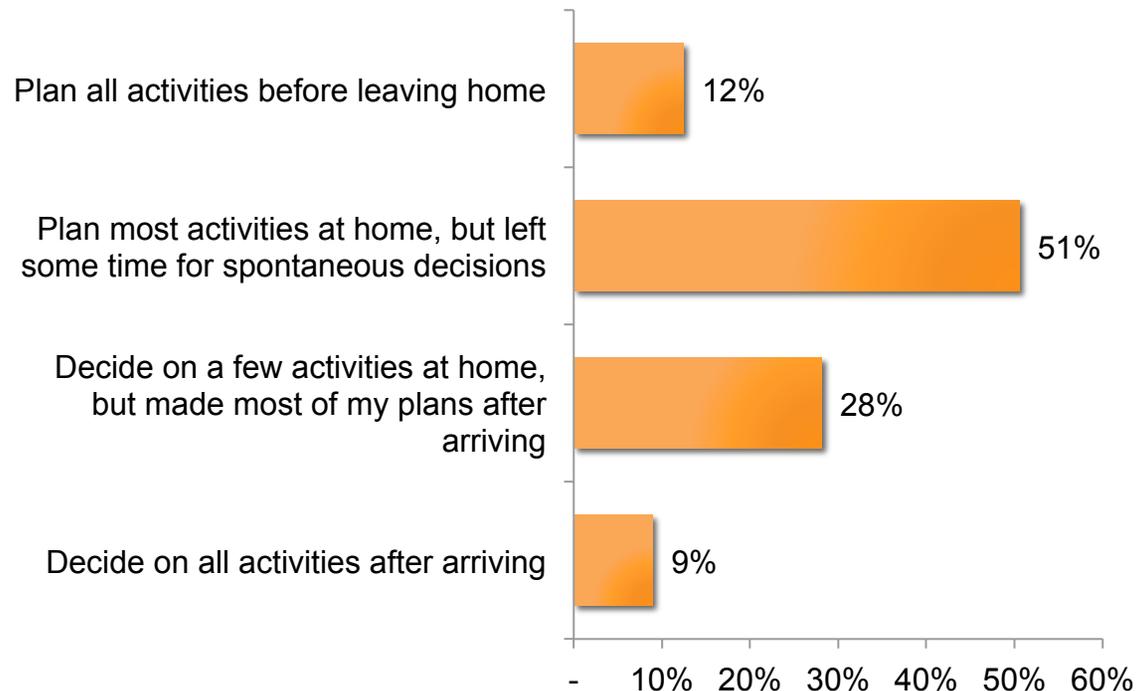
B7. Which best describes how you budgeted for this trip?

# Pre-planning Activities



Over 90% of tourists do at least some pre-planning of activities prior to leaving home. However, only 12% plan all their activities, which leaves the majority of tourists with some flexibility in their schedule to add activities once in-market.

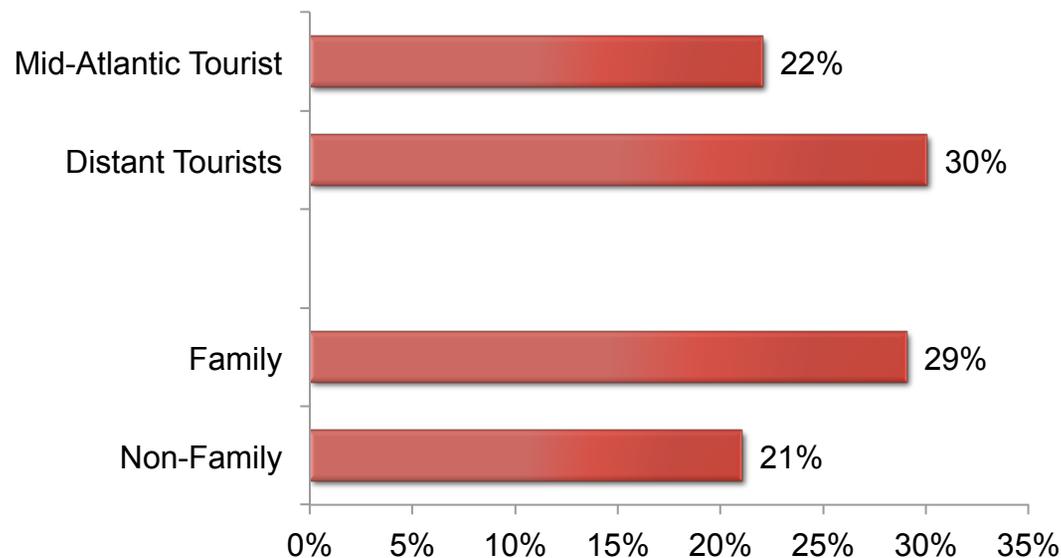
**Timing of Planning of Activities  
(Tourists)**



# The Importance of Pre-Arrival Commitment

It is not uncommon for tourists to plan more activities than they actually do. Depending on the segment, 20% to 30% of respondents dropped an activity they had previously planned.

**Activities Planned Pre-Arrival, but Dropped  
(Tourists)**



## INSIGHT

1 in 4 Tourists will drop something from their itinerary once in-market.

## IMPLICATION

Pre-arrival commitment is key. The more guests are invested through advance ticket sales or creating a “Must See” destination, the more likely they are to visit.



# So Much to See, So Little Time

Among the 24% of tourists who dropped something from their itinerary once in-market, the list of venues is long and varied. The extensive offering of museums, monuments, and historical sites in Washington D.C. and Baltimore makes it difficult to see it all within the average length of stay, which may also speak to why the destination is so repeatable.

%	Venues Missed
7.7%	The White House
6.0%	Monuments (Unspecified), Shopping
5.1%	Show (Music/Concert/Play) – Unspecified Venue
4.3%	Museum (Unspecified), Smithsonian, Tour (Boat/Bus)
3.4%	Cherry Blossoms, Lincoln Memorial, Restaurant (Unspecified) Sightseeing (Unspecified), Visit Friends / Relatives, Zoo
2.6%	Arlington Cemetery, Washington Monument
1.7%	Holocaust Museum, Kennedy Center, National Archives, Non Outdoor Activities (Unspecified), Vietnam Memorial
0.9%	Air and Space Museum, Air and Space Museum IMAX, American History Museum, Annapolis, Art Gallery, Dance, Embassy Doors, Farmer's Market, Georgetown Cupcakes, Harbor, Jefferson Memorial, Lincoln Library, Local Arts Scene, Modern Art Museum, Mount Vernon, Movies, National History Museum, National Mall, National Monument, New Year's Eve Fireworks, Ocean City, Old Post Office Tower, Party, Re-enactments, Reflection Pools, Sky Diving, Spy Museum, Theater Performance, US Botanic Gardens, US Capitol, US Treasury

## INSIGHT

Merriweather Park at Symphony Woods will be competing with other strong attractions.

## IMPLICATION

Leveraging the interest in Mall in Columbia, and ensuring tourists know what is available very close by, will help position both the Mall and Park as a strong “must see” area.



# Pre-Arrival Information Sources



Online research and recommendations from friends were the two primary sources of pre-arrival information. Usage of social media and magazines was significantly lower.

Pre-Arrival Information Sources (Tourists)				
	Mid-Atlantic Tourists	Distant Tourists	Family	Non- Family
Online Research	82%	93%	91%	81%
Recommendations from Friends	59%	67%	64%	60%
Social Media Sites	20%	28%	31%	16%
Magazines or Publications	18%	29%	27%	17%

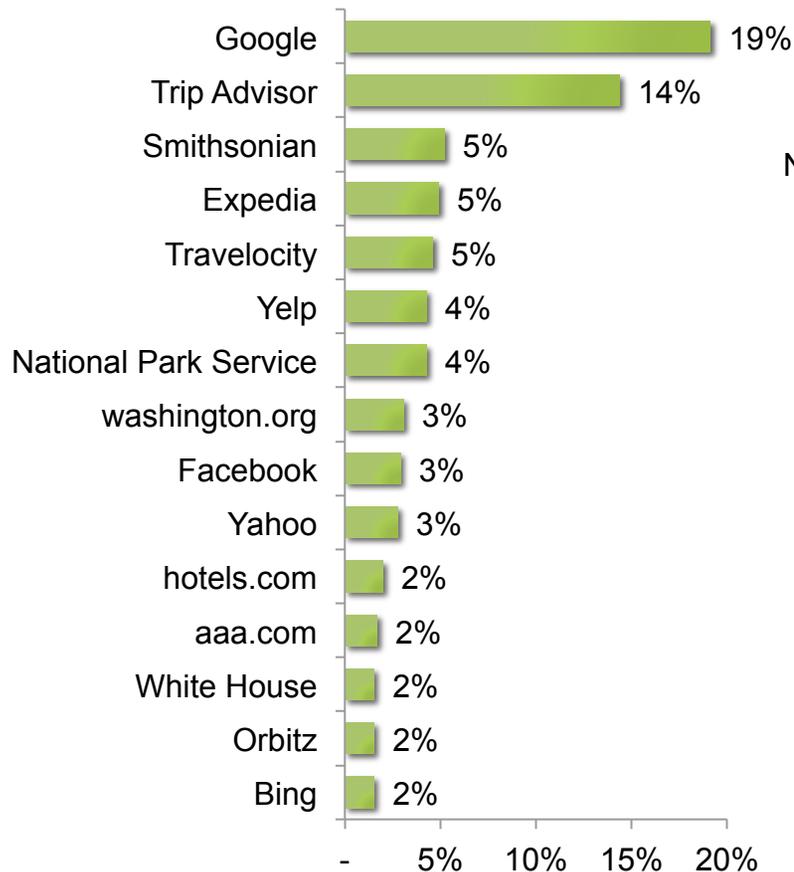
*For a complete list of sources used (online and publication), see Appendix. B9. While you were still at home before this trip, what resources did you use to decide what activities to do? (Multiple Responses Allowed).*



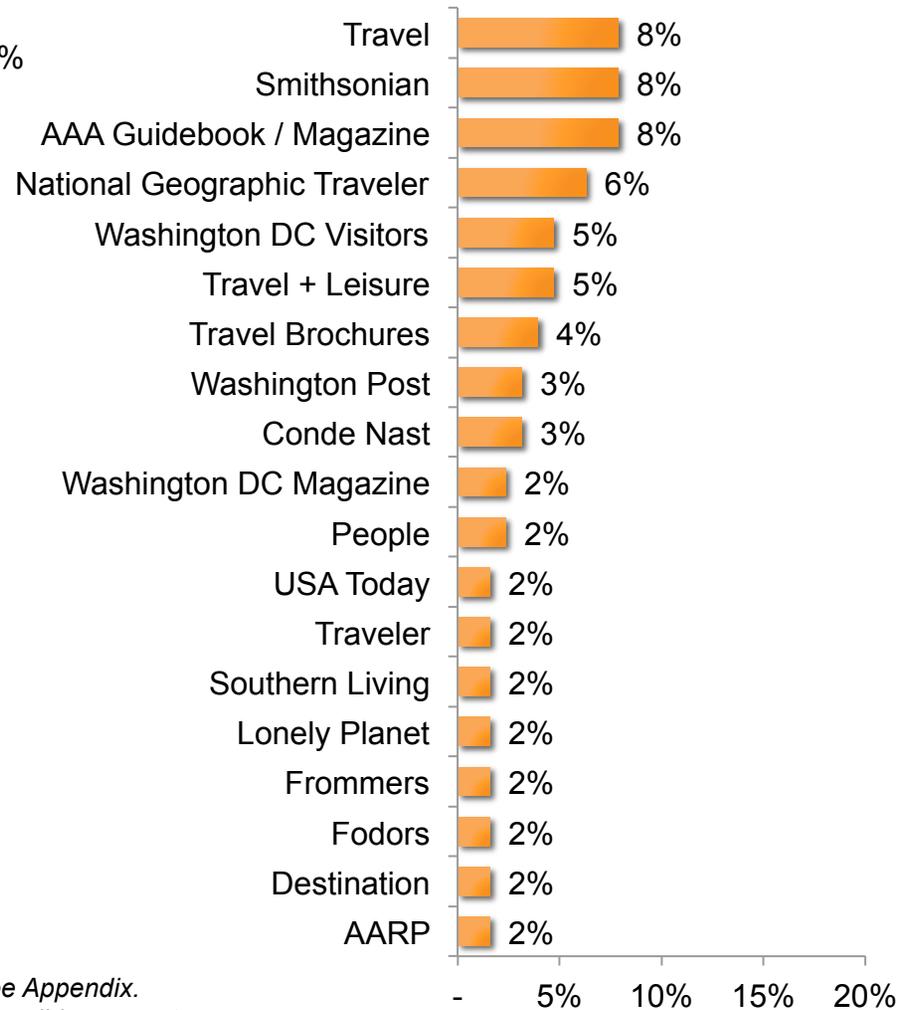
# Pre-Arrival Information Sources

Google and Trip Advisor were the most often used online tools while Travel, Smithsonian, and AAA publications were the choice of print material.

## Most Used Online Sources



## Most Used Publications



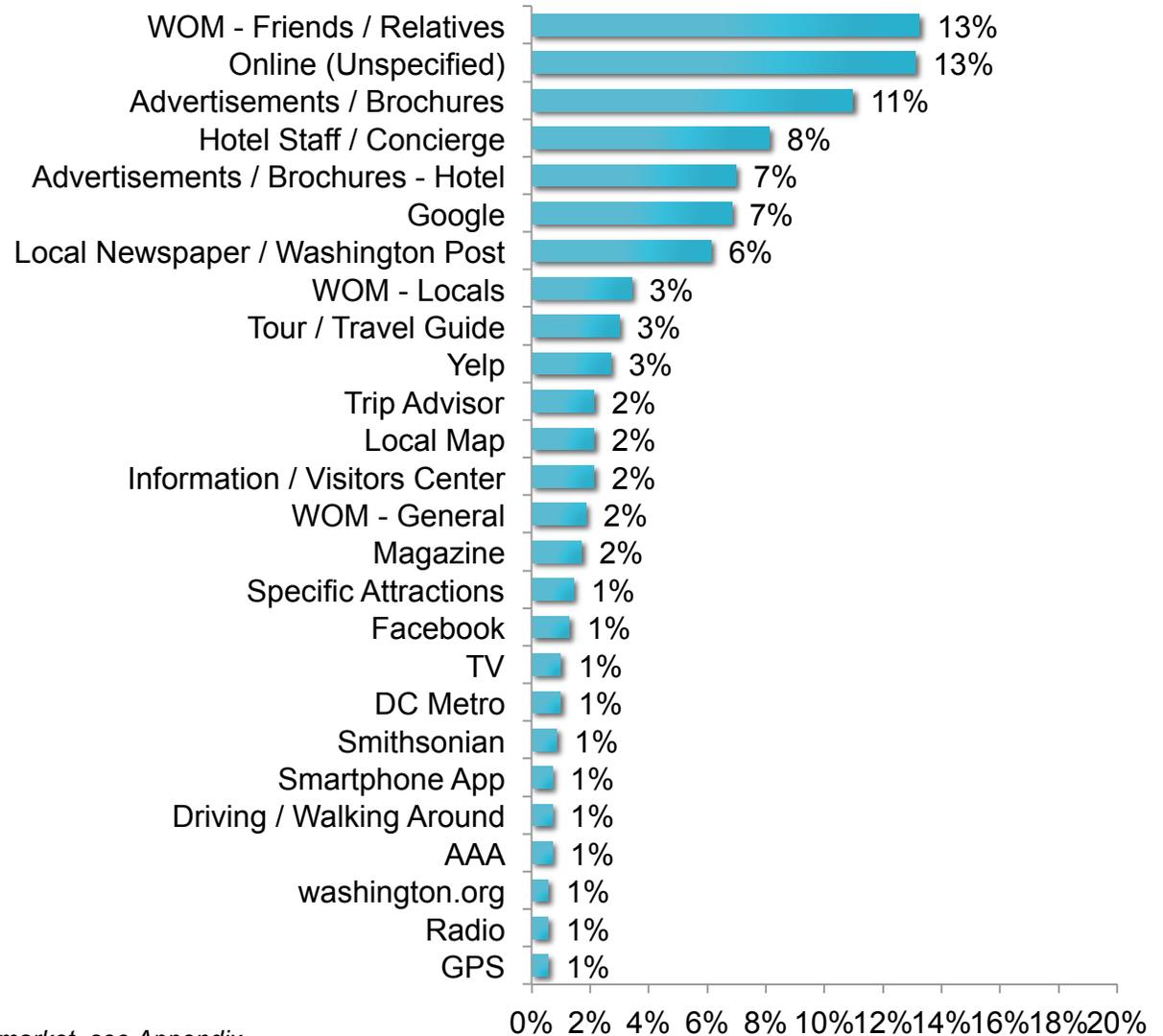
For a complete list of sources used (online and publication), see Appendix.  
 B9. While you were still at home before this trip, what resources did you use to decide what activities to do? (Multiple Responses Allowed).

# Post-Arrival Information Sources

Once in-market, tourists are primarily getting their information via word of mouth, the staff, and printed materials at their hotel. Although they are also utilizing online resources, it is highly fragmented among many different sites.

All categories of word of mouth account for 19% of responses, advertisements and brochures for 18%, and hotel overall for 15%.

## Top In-Market Information Sources



For a complete list of sources used in-market, see Appendix.

B12: After arriving in the area, what resources did you use to find out about local events and activities? Please list all you can think of and please be as specific as possible.

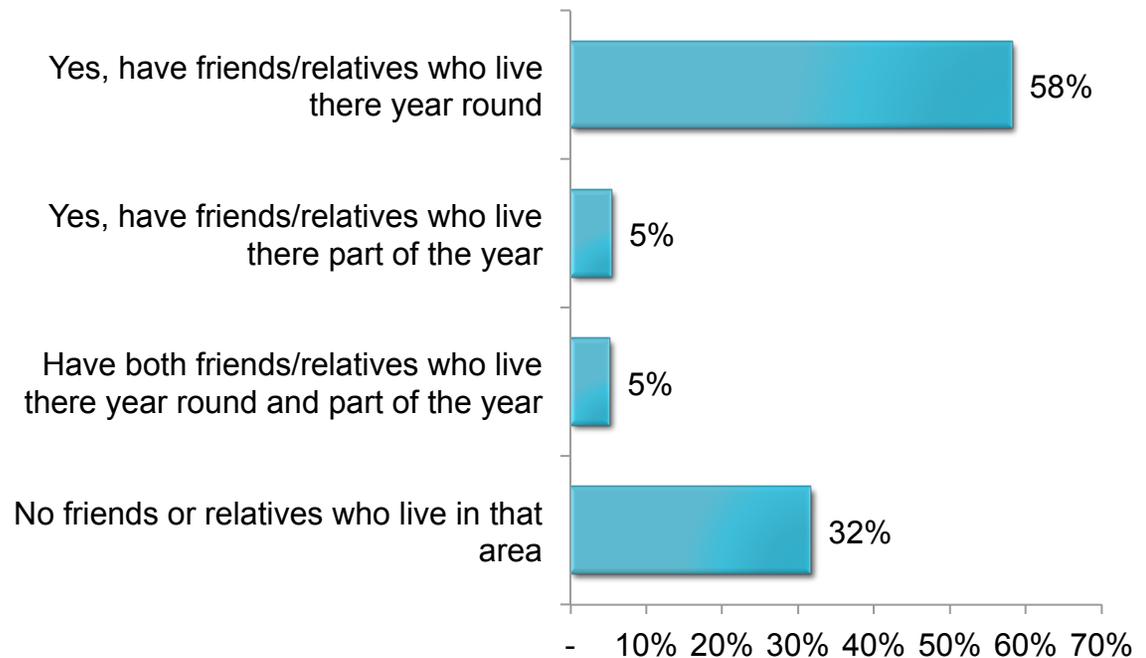


# Tourists with Friends/Relatives in the Area



The majority of tourists (68%) have friends or relatives who live in the Washington D.C. / Baltimore area for at least part of the year.

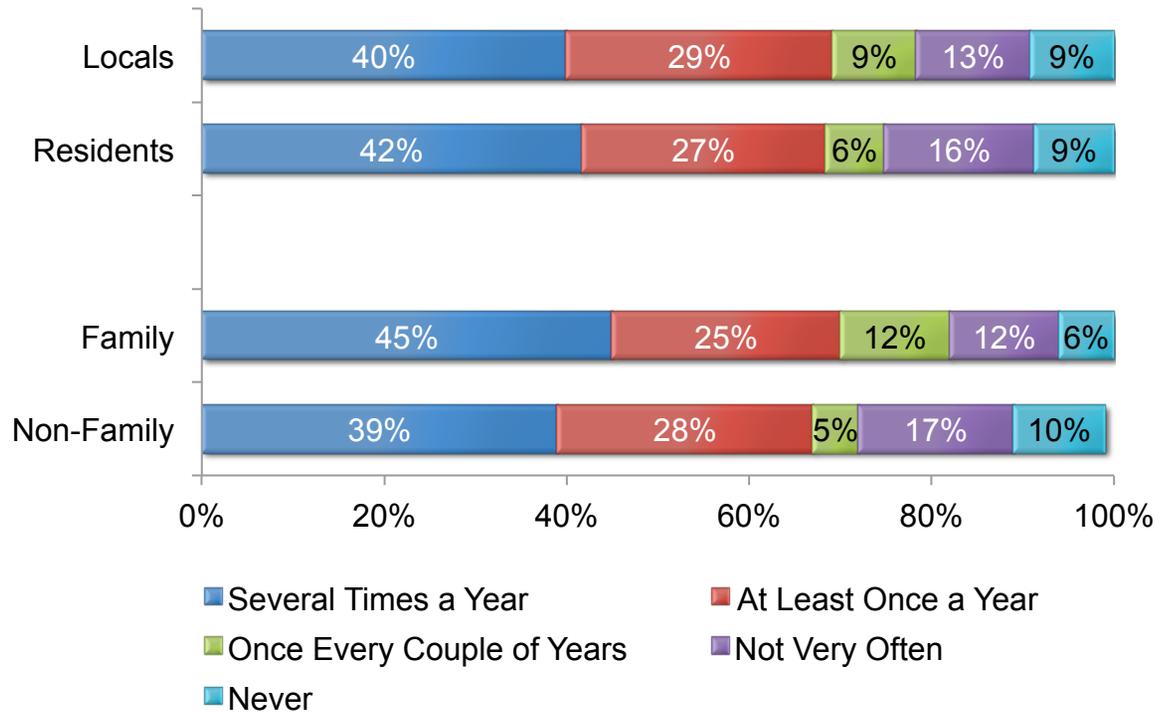
## Tourists Who Have Friends / Relatives in the Area



# Locals and Residents Can Be Ambassadors

Approximately 7 in 10 locals and residents host friends and family at least once per year with families more likely to do so.

**Frequency of Hosting Out of Town Friends/Family (Tourists)**



## INSIGHT

Given the popularity of the area as a tourist destination, locals are frequent hosts to out of town friends and relatives.

## IMPLICATION

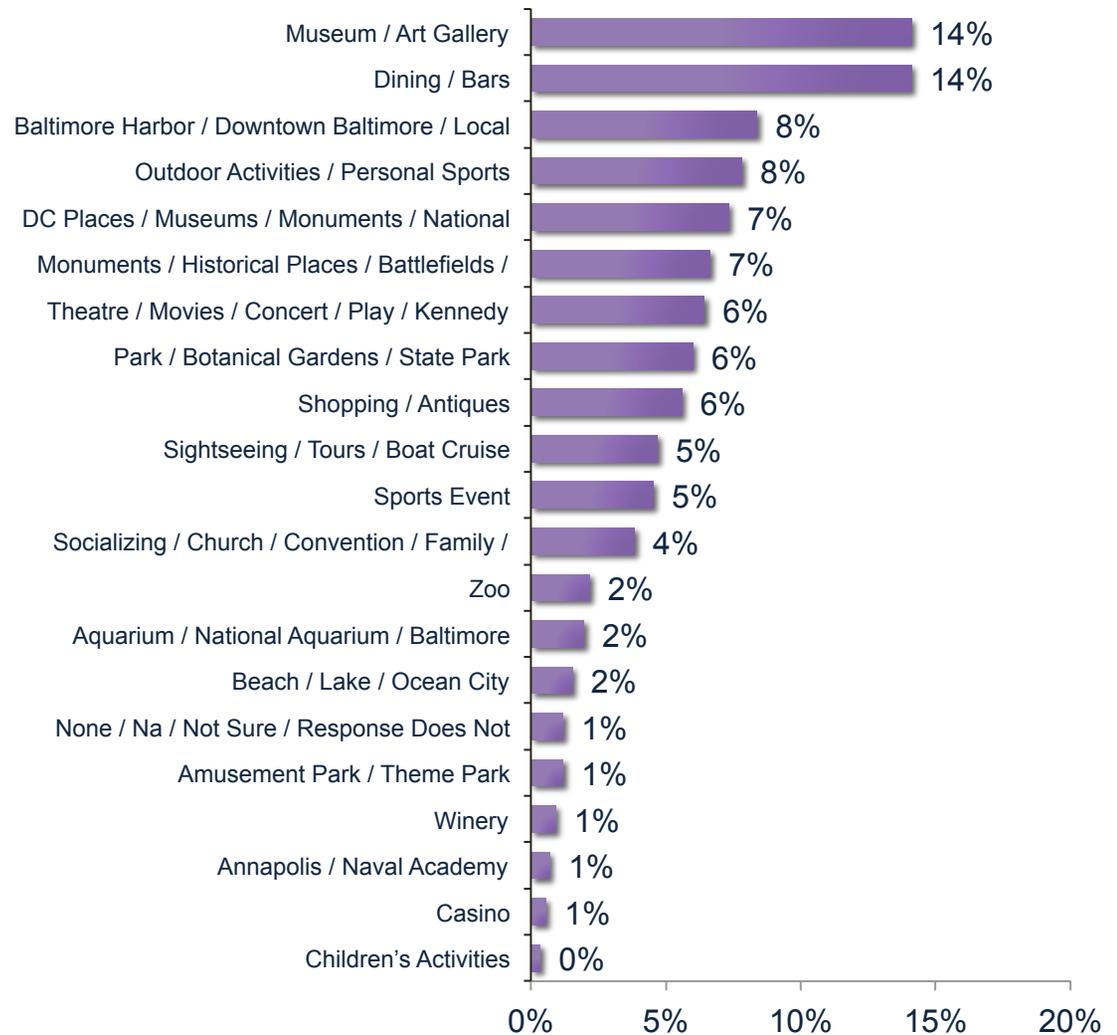
Building advocacy among the locals and residents will be a key success factor as they are in a position to significantly influence their visitors choices.



# Activities Recommended by Locals and Residents



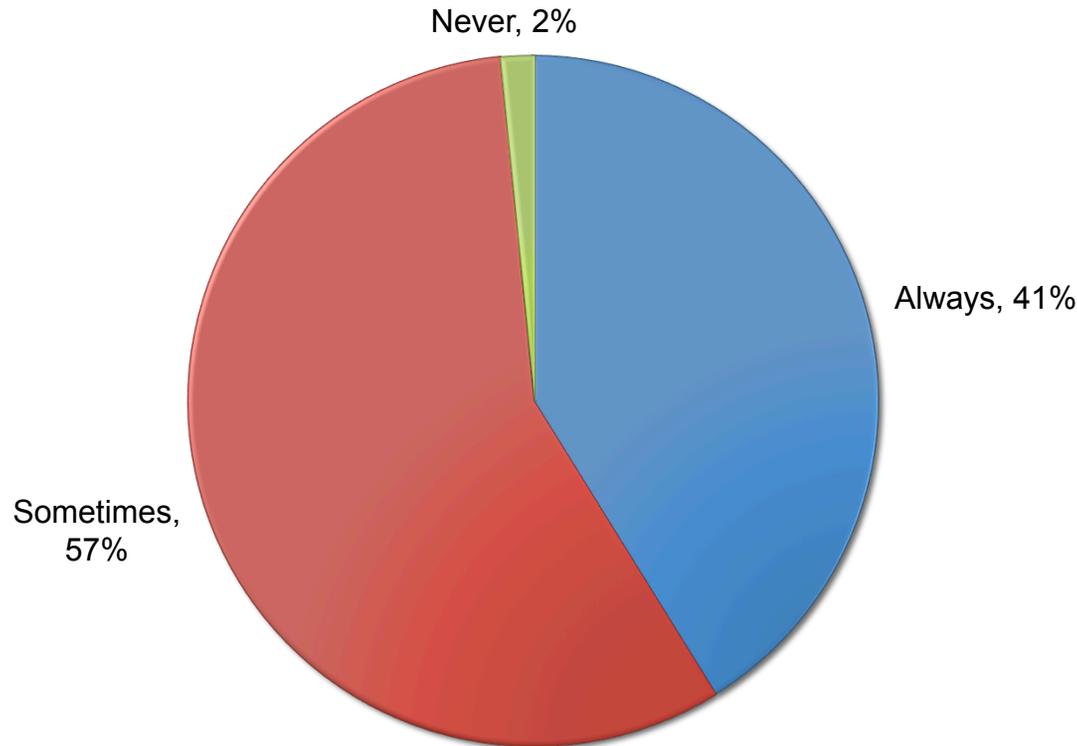
## Top Activities Recommended by Locals and Residents



C2: When hosting out-of-town guests, what activities do you recommend or suggest to them? ? (Multiple Responses Allowed)

# When Guests Visit, Locals and Residents Typically Go

**How Often do you Accompany Out of Town Guests? (Locals and Residents)**



## INSIGHT

When locals and residents host out-of-town guests, they will typically accompany them on activities

## IMPLICATION

Helping locals and residents understand all there is to see and do at Merriweather Park at Symphony Woods will encourage them to select it as a place to take their guests.





# LOCAL AND RESIDENT BEHAVIOR

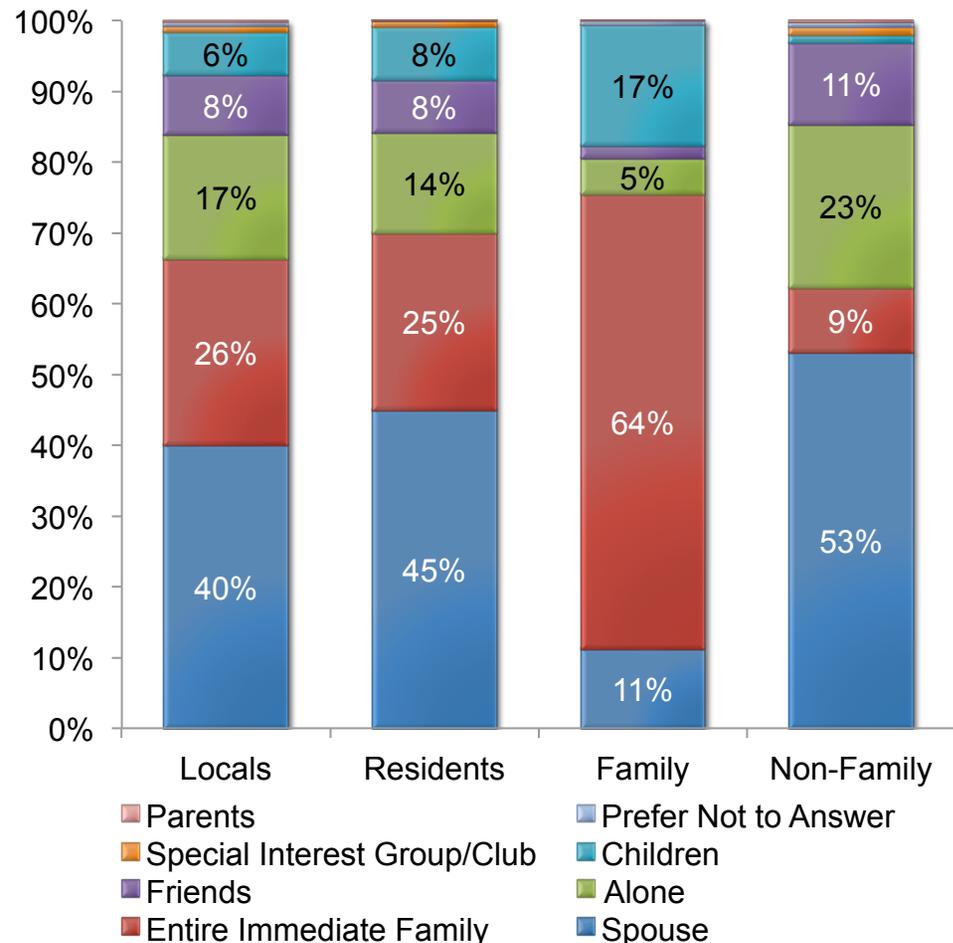


# Who Do You Hang With?

When locals and residents have free leisure time, 40% to 45% will spend it with their spouse or significant other and approximately 25% spend it with their entire, immediate family.



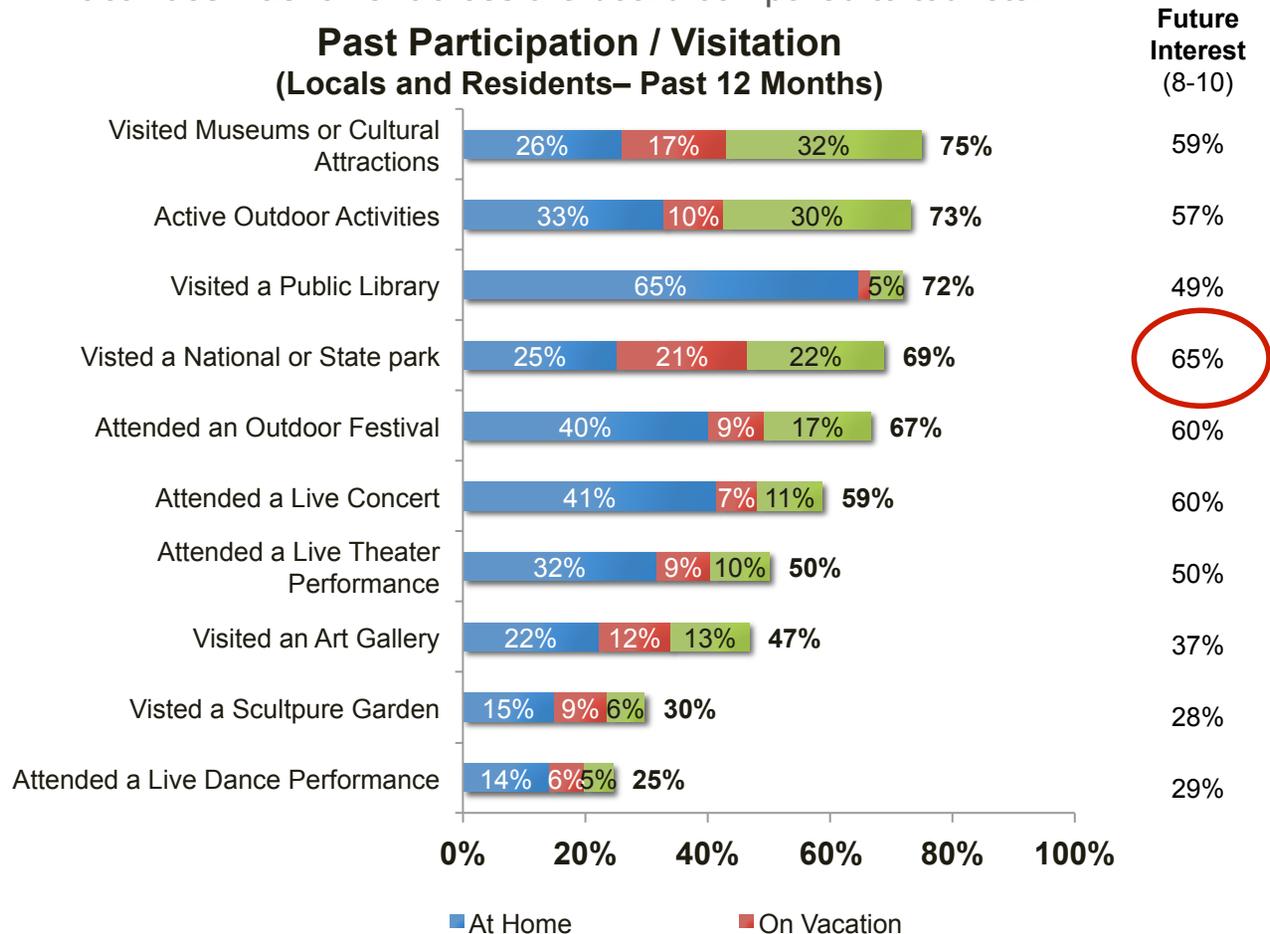
**Who is Leisure Time Spent With?  
(Locals and Residents)**



CO: With whom do you spend most of your leisure time?

# Past Participation and Future Interest

Participation for locals and residents, whether at home or on vacation, during the past 12 months was highest for visiting museums or cultural attractions and engaging in active outdoor activities. However, future interest was highest for visiting national or state parks. Interest in activities was lower across the board compared to tourists.



**INSIGHT**

Similar to tourists, locals have strong interest in the types of activities Merriweather Park at Symphony Woods will provide.

**IMPLICATION**

The critical mass of what is available in the immediate area – the Park, events, the Library, the Mall – will keep the Park top of mind for locals, both as a place for them, and to take their out of town visitors.

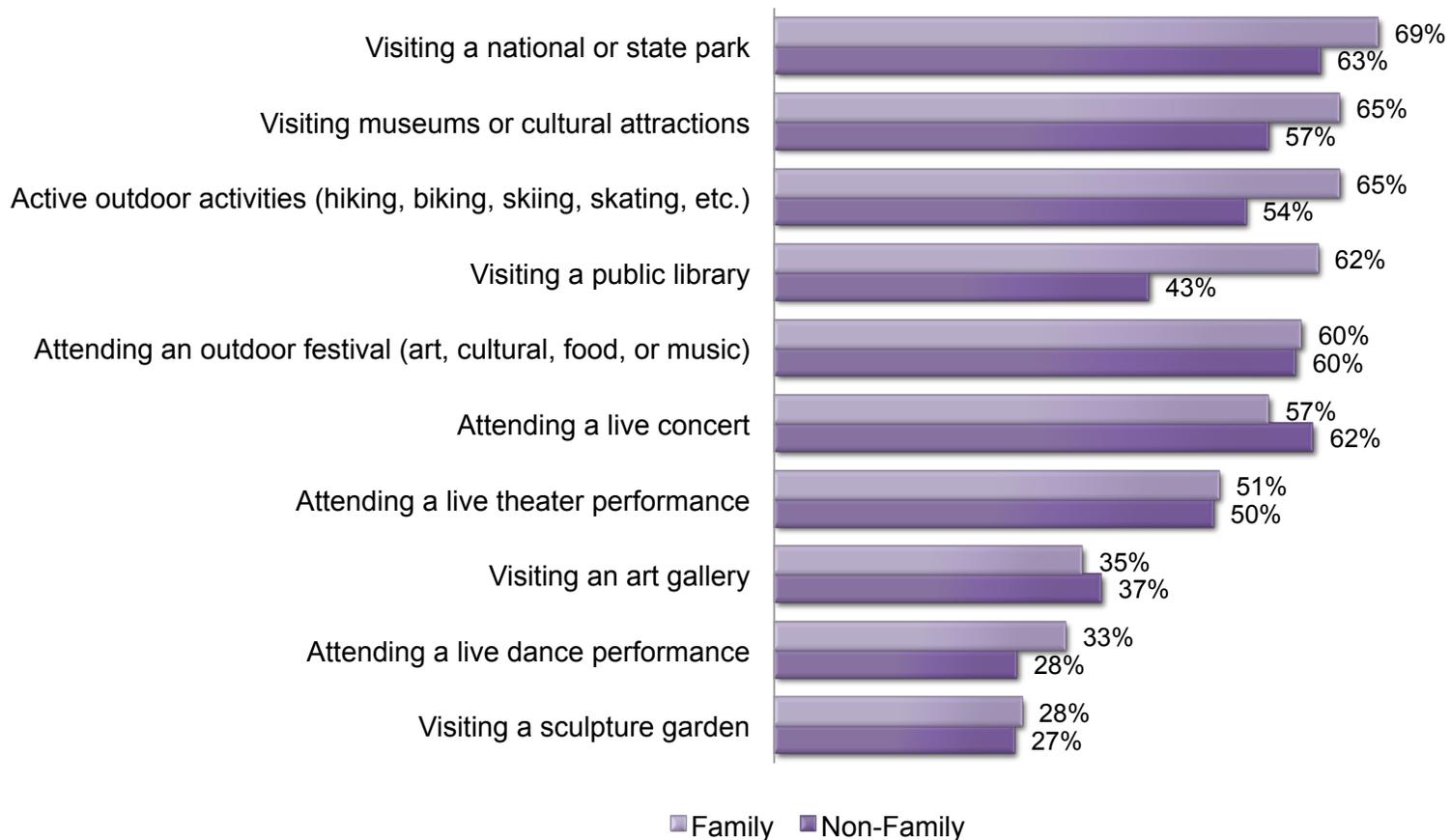


A7: In the past twelve months, in which of the following activities have you or someone in your household participated? Please indicate if you participated in the activity while at home, on vacation, both or not at all  
 A8: How interested are you personally in each of the following activities?

# Families Are More Interested in Activities

In almost all cases, local and resident families have a higher interest in participating in activities vs. non-families. Attending live concerts and visiting art galleries are the only exceptions.

## Interesting Participating in Activities (8-10 Interest on 10-Point Scale)

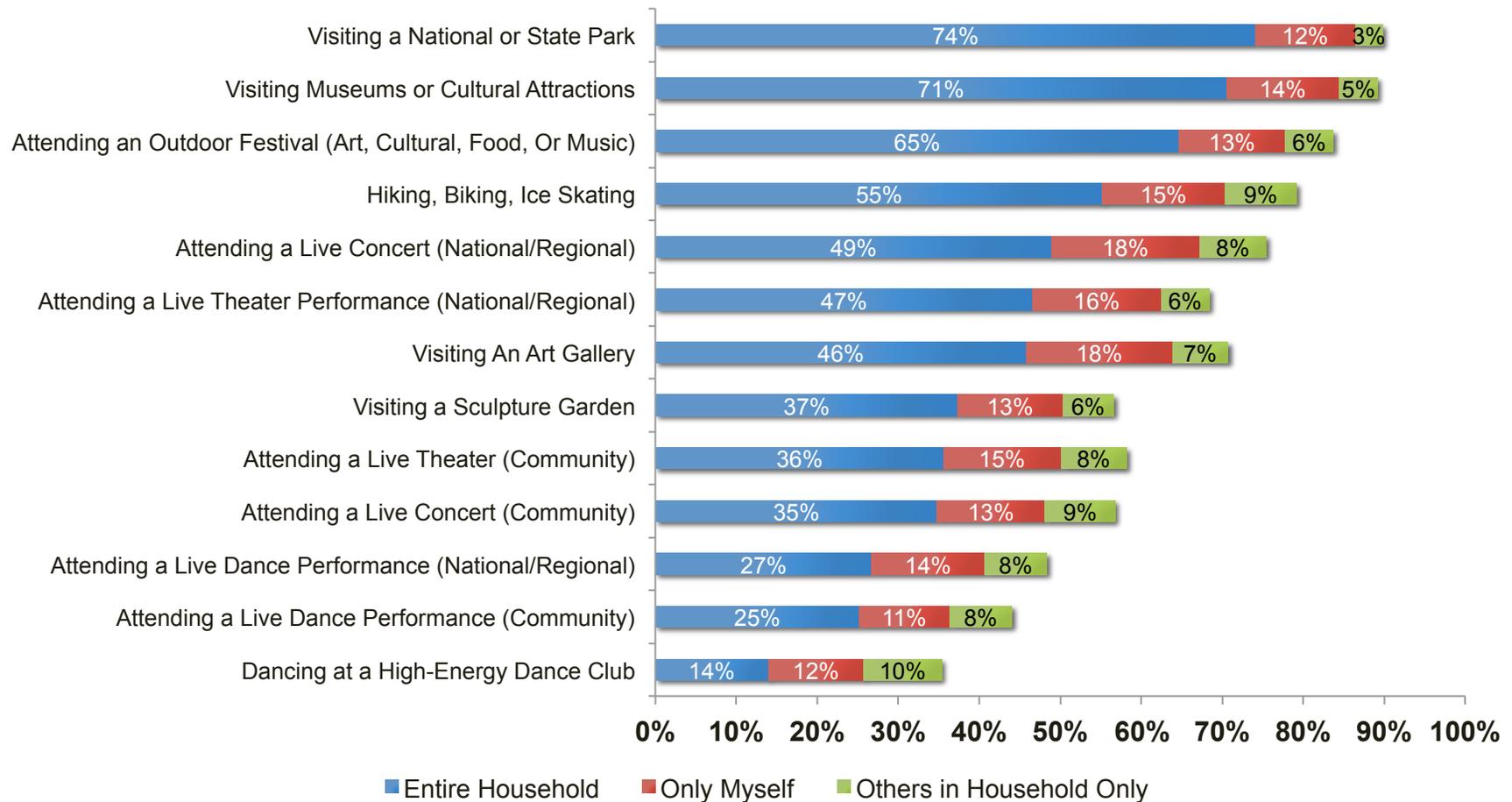


A8. How interested are you personally in each of the following activities?

# High Interest = High Likelihood to Participate

Among locals and residents, stated likelihood to participate in the next 12 months closely aligns with interest in these activities.

## Likelihood to Participate in Activities (Locals and Residents)



Community = Community Based Performers

Regional/National = Regionally or Nationally Acclaimed Performers

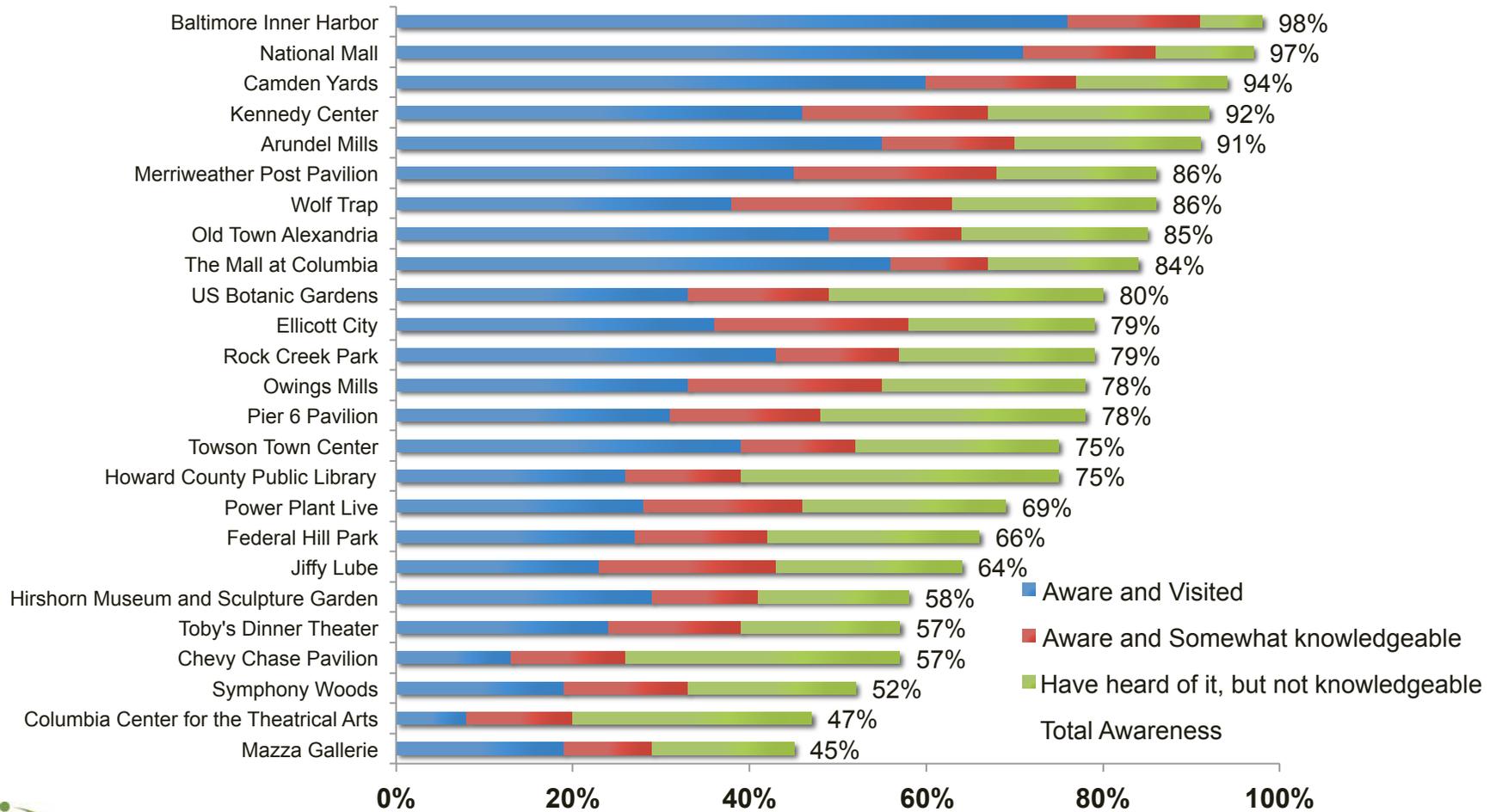
C9: How would you best describe your likelihood to participate in each of the following in the next 12 months?



# Locals and Residents Know the Area

Locals and Residents have a higher awareness of many venues, especially among the Baltimore venues.

**Awareness and Past Visitation  
(Locals and Residents)**

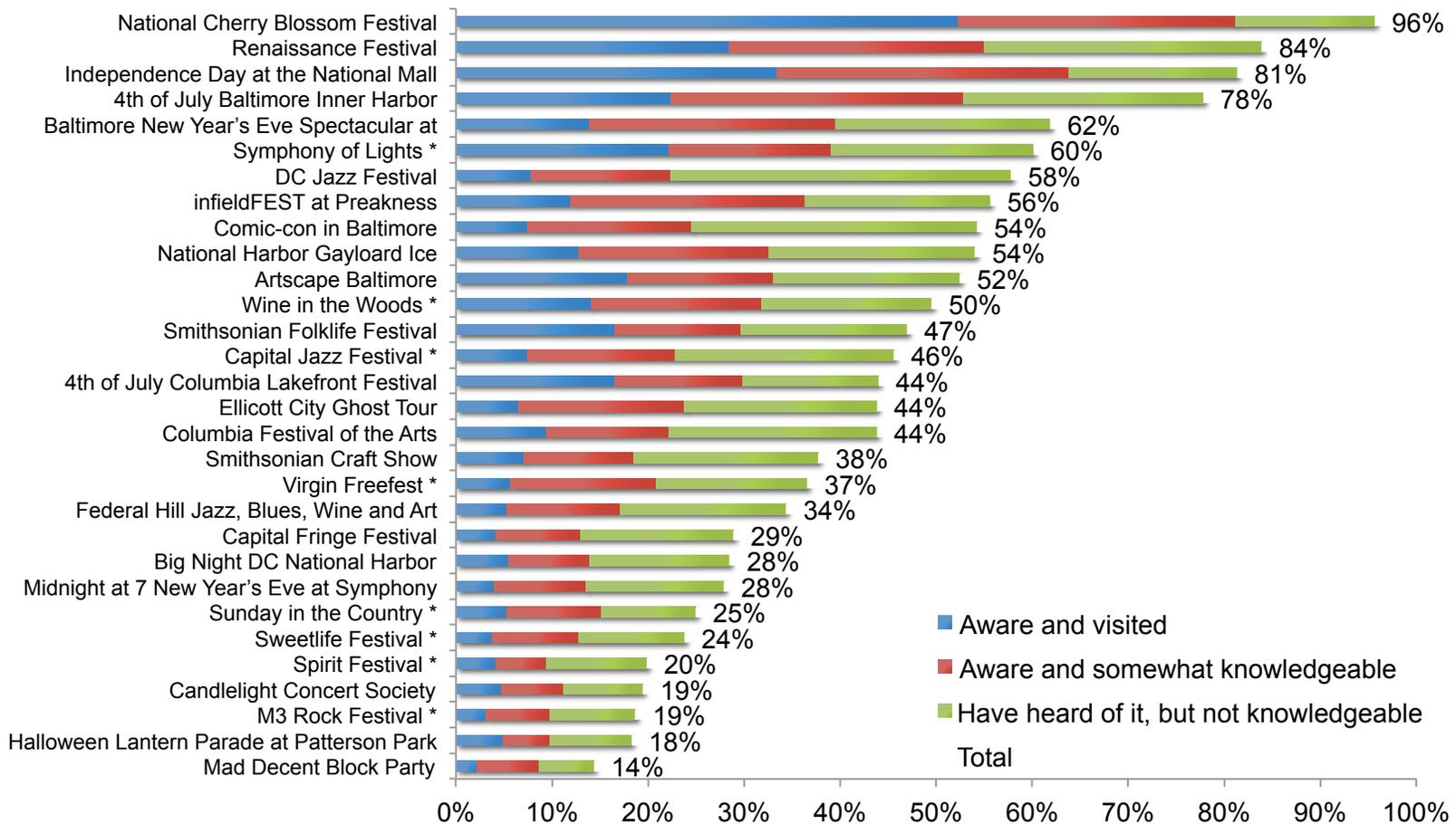


C4: How familiar are you with the following?

# Event Awareness is Low

Compared to the permanent attractions, awareness of events outside of the nationally recognized events like the Cherry Blossom Festival is relatively low.

**Event Awareness and Past Visitation  
(Locals and Residents)**



\* Events currently held at Merriweather Park or Symphony Woods  
C7aHow familiar are you with each of the following events?

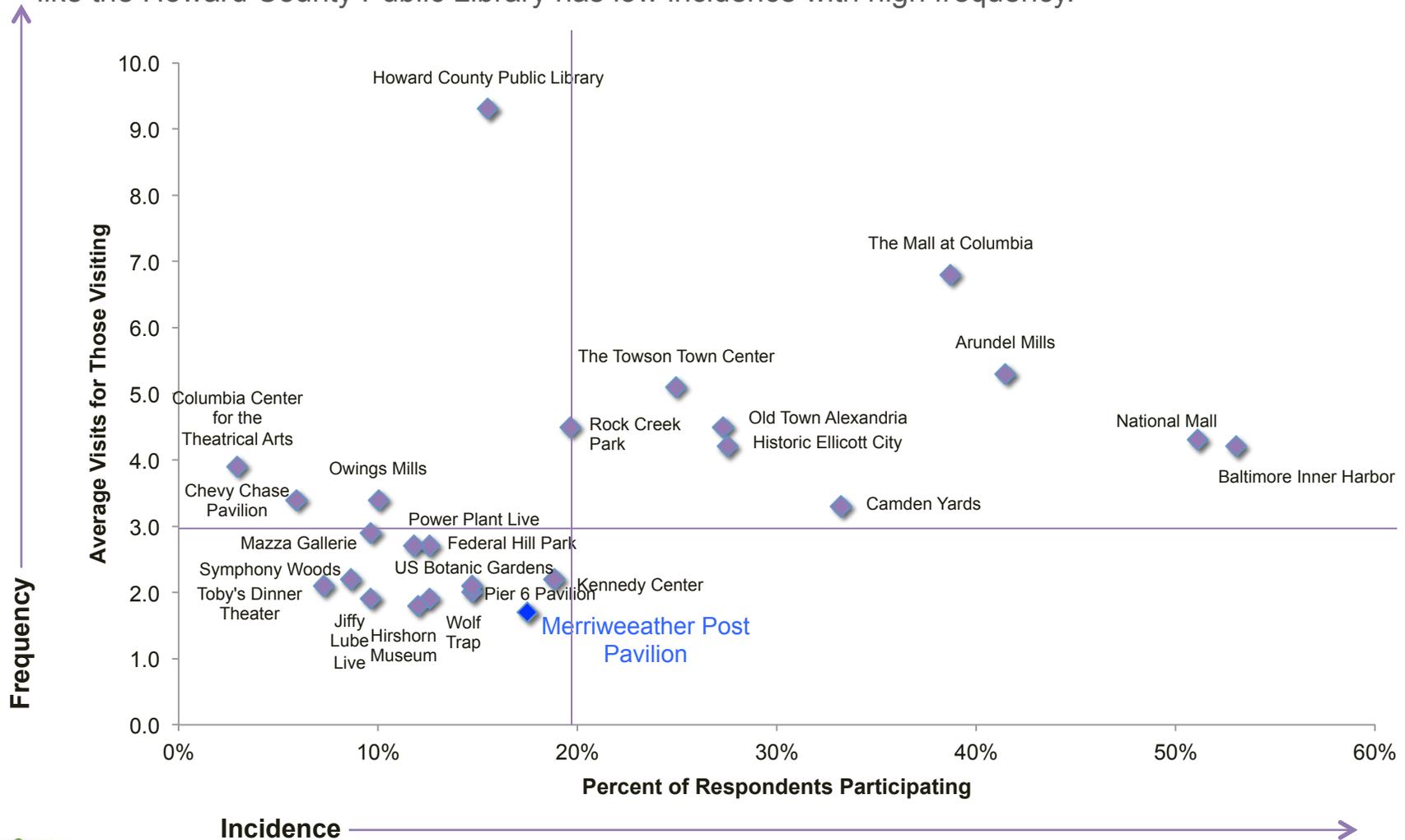


# AWARENESS AND LIKELIHOOD TO VISIT EXISTING VENUES AND EVENTS



# Venue Incidence and Frequency of Visitation

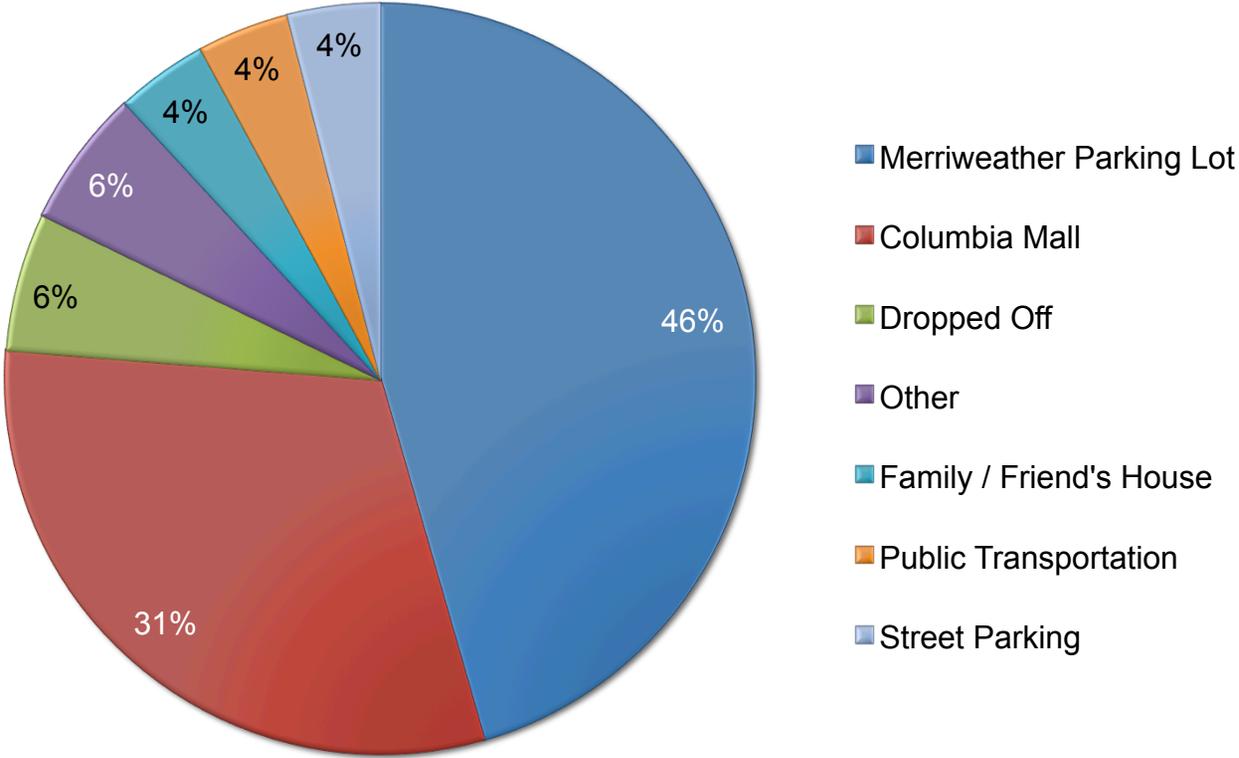
Some venues have a high percentage of locals and residents visiting (high incidence) and some have fewer unique visitors, but have visitors that visit often (high frequency). Attendance is a combination of the two. Venues like the Mall in Columbia have both high incidence and high frequency, but a venue like the Howard County Public Library has low incidence with high frequency.



Note; Chart is intended to show the relative positioning of one venue compared to another and not the absolute numbers. C5: For each of these that you have visited, please indicate how many times in total you have visited in the last 12 months.

# Locals and Residents Park Where They Can

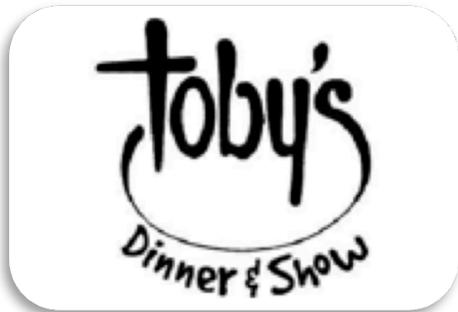
Locals and residents who had been to Merriweather Post Pavilion typically park in the lots available at the venue and at the Mall in Columbia.



C6. What performances did you see in the past 12 months at Merriweather Post Pavilion? [Open end]  
C6A. Where do you typically park when you attend performances at Merriweather Post Pavilion? {Open end}.  
C7. What performances did you see in the past 12 months at Toby's Dinner Theater? [Open end]



# Locals and Residents Like a Variety of Shows



Locals and Residents have seen a variety of shows over the past 12 months at Merriweather Post Pavilion and Toby's Dinner Theater. The long list of single show mentions is an indicator that across our sample, respondents have a wide array of tastes and preferences for performances.

%	Performances Attended
<b>Merriweather Post Pavilion</b>	
8%	Wine in the Woods
6%	Capitol Jazz Fest, Jack Johnson, Luke Bryan, Of Monsters and Men, Warped Tour
4%	Graduation Ceremony, Imagine Dragons, Phish, Virgin Free Fest, Zac Brown Band
2%	Bare Naked Ladies, Bob Dylan, Christmas Lights, Country Fest, Erykah Badu, Fallout Boy, Fun Further, Jack White, Jethro Tull, John Legend, Katy Perry, Kerfluffle, Kix, Lumineers, My Morning Jacket, New Order, OAR, Paramore, Rouse Celebration, The Killers, The Postal Service
<b>Toby's Dinner Theater</b>	
25%	Shrek, Spamalot
13%	Christmas Show
8%	Les Miserables, Miracle on 34 <sup>th</sup> Street
4%	High School Musical, Peter Pan, Romeo and Juliet, The Sound of Music

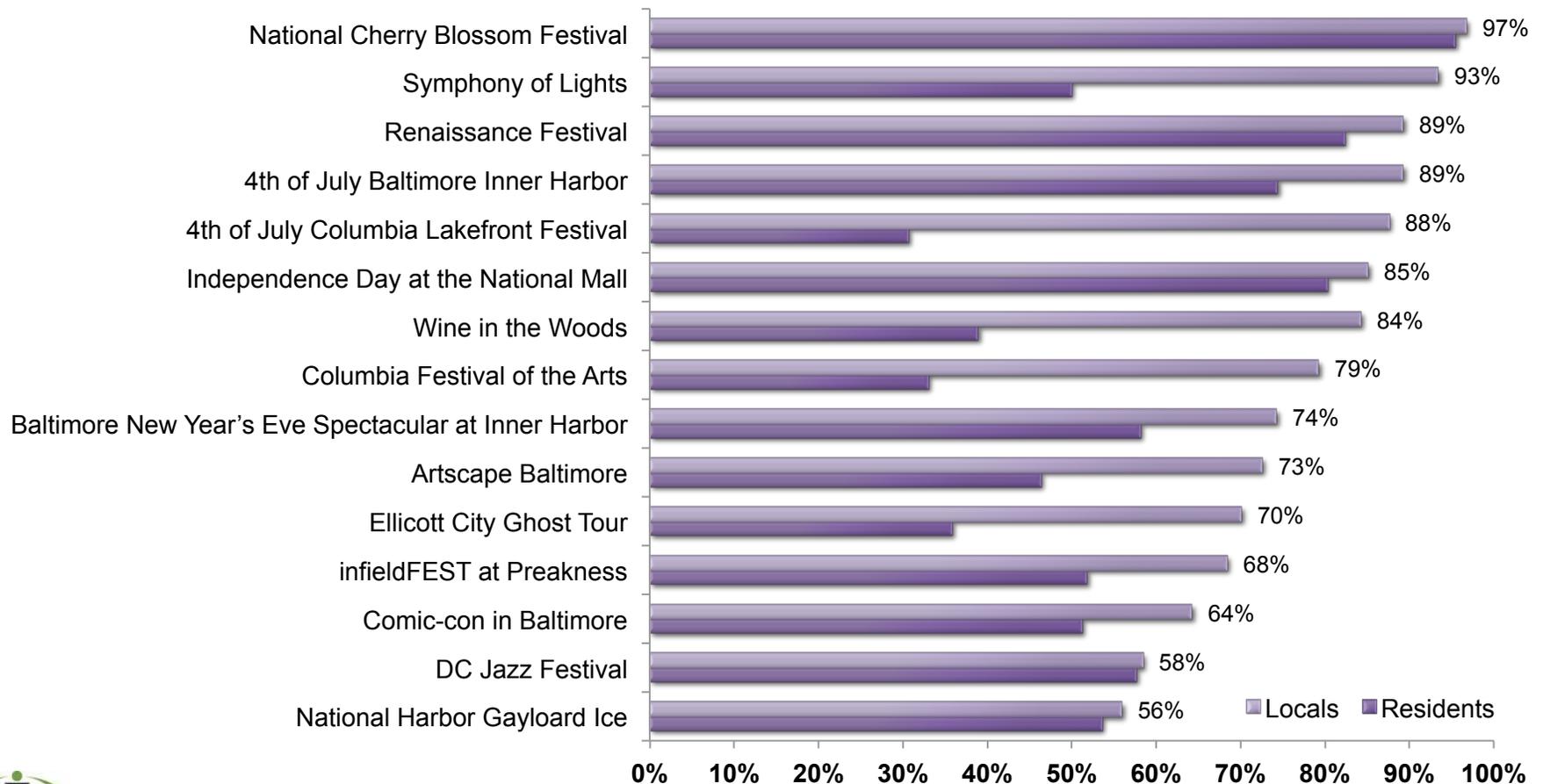


C6. What performances did you see in the past 12 months at Merriweather Post Pavilion? [Open end]  
 C6A. Where do you typically park when you attend performances at Merriweather Post Pavilion? {Open end].  
 C7. What performances did you see in the past 12 months at Toby's Dinner Theater? [Open end]

# Locals are 'In the Know'

Not surprisingly, awareness among locals is higher than residents, especially for events held in Columbia. As would be expected, local awareness was higher for all listed events indicating locals are more informed about events taking place in the region. There was little difference between families and non-families.

**Event Awareness  
Locals and Residents**

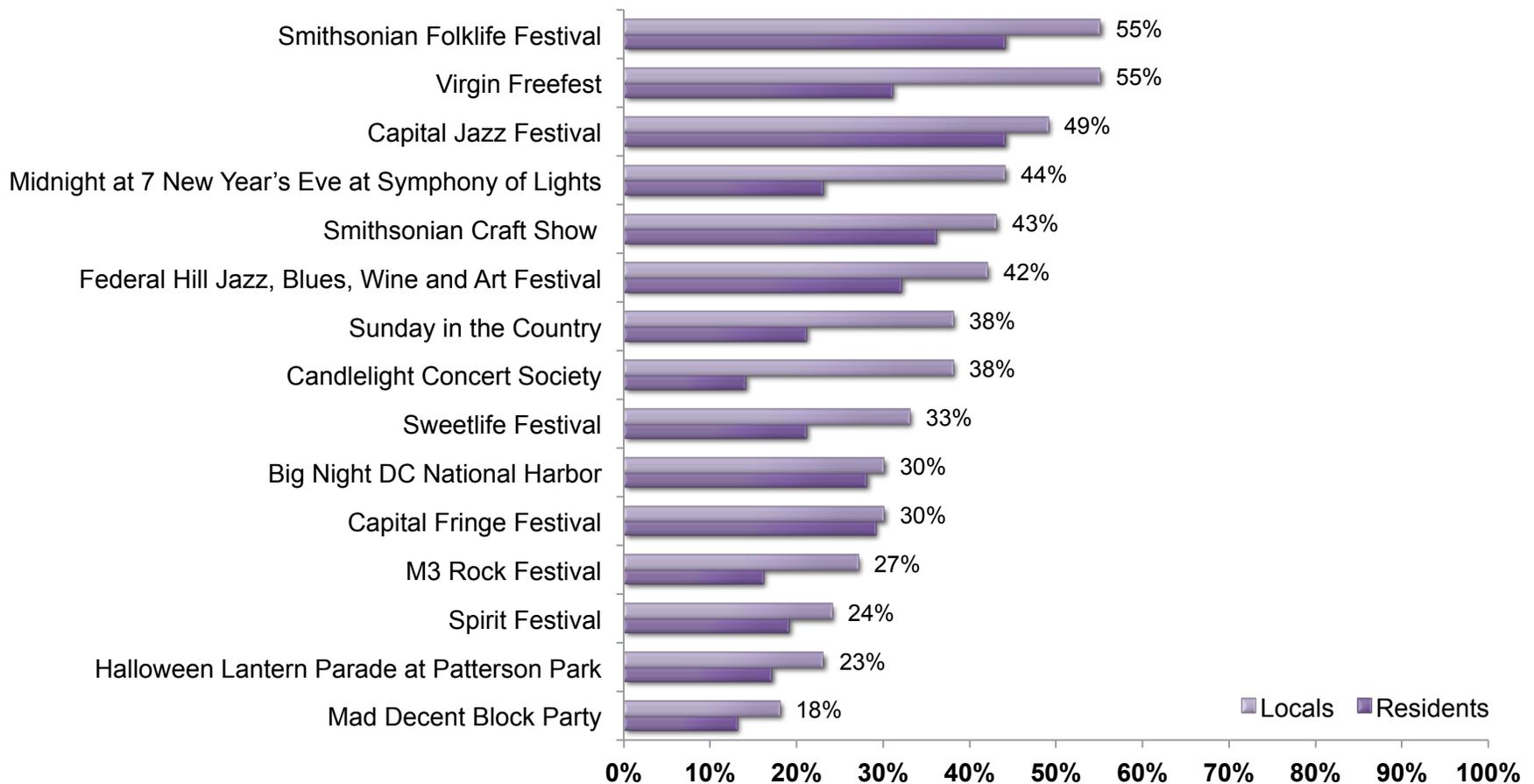


*C7aHow familiar are you with each of the following events?*

# Locals are 'In the Know' – For the Most Part

Events that appeal to a narrower demographic, like the Capital Fringe Festival and the Spirit Festival have lower awareness.

**Event Awareness  
Locals and Residents**



# Future Visitation

Locals and Residents who have previously visited or who have some level of knowledge of the venue, have a high likelihood of visiting Baltimore Inner Harbor and the National Mall in the next 12 months.

Among the local venues and events, likelihood to visit is high among the non-event driven venues like the Mall and Library. The events currently held at Merriweather Post Pavilion and Symphony Woods range from 19% to 33%.

**Likelihood to Visit or Attend (Next 12 Months)**  
 (Locals and Residents Who Have Visited or are Aware and Have Some Knowledge)

