

ECONOMIC IMPACT & AUDIENCE RESEARCH REPORT

Prepared by Forward Analytics



2014

STAR-SPANGLED SPECTACULAR

Celebrating the 200th Anniversary
of our National Anthem



Photo Credits: André Chung | Friends of Fort McHenry | Jay Baker | Martin State Airport

Highlights of the Study

- Spectacular attracted an estimated 1.43 million visitors over the seven-day event, September 10th to 16th, 2014. Survey research shows that more than 1.2 million Marylanders experienced the event, while another 213,500 visitors came from out-of-state. Survey respondents included residents of 18 other states, spanning the country from Maine to Florida and Texas to California and Washington.
- Eighty percent of survey respondents indicated that Spectacular and its events were the “main reason for visiting the Baltimore area today.” The commemoration attracted an estimated 205,000 first-time visitors. Moreover, 48.4% revealed that they would NOT have visited Baltimore (today) if there were no Spectacular.
- Tall ships, Navy ships, and Blue Angels were the main attraction to Baltimore’s Inner Harbor during Spectacular (according to audience research). The majority of visitors (64.4%) spent 5 or more hours per visit in Baltimore while enjoying the free entertainment of Spectacular. Yet, 30.4% of survey respondents spent 4 or more days at Spectacular.
- The total economic impact of Spectacular is estimated at \$164.10 million for the week-long historic event. Spectacular increased the local business volume by \$96.53 million in direct impact and \$67.57 million in indirect impact. With event operating expenditures totaling \$4.57 million that means for every \$1 spent more than \$35 was generated in direct and indirect impact for the Maryland economy.
- Spectacular visitors spent an estimated \$41.15 million at local restaurants. Overnight visitors accommodated over 46,000 room nights resulting in a direct impact of \$7.25 million for hotels and other overnight accommodations. Other expenses included retail, attractions, parking, gasoline, and ground transportation. Each non-local visitor spent an estimated \$86 while enjoying Spectacular.
- The State of Maryland received an estimated \$6.42 million in tax revenue from the economic activity generated by Spectacular visitors. In addition to the \$85.77 million in spending by visitors, the City of Baltimore gained an estimated \$1.5 million in tax revenues.
- The \$96.53 million in direct spending attributable to Spectacular generated an additional \$148.35 million in Maryland’s employment wages¹ supporting 3,974 FTE at an annual salary of approximately \$37,300.
- Together Visit Baltimore and the Maryland Office of Tourism created and purchased more than \$1.47 million in television, print, billboard and radio advertising reaching 125+ million people in important tourism markets. The results show over 2,025 news stories with \$33 million in ad value and more than 2.2 billion circulation impressions that included key messages about Baltimore as the birthplace of the national anthem. Outlets included World News Tonight, ABC This Week, Good Morning America, CBS Sunday Morning, Sunday Night Football, Fox Football Sunday, CBS Saturday Morning, Tonight Show with Jimmy Fallon, among others.

¹ Forward Analytics utilizes the Gross Employment Multiplier of 1.5368 generated by United States Bureau of Economic Analysis to determine the employment wage impact.

I. Introduction

Star-Spangled Spectacular was a thunderous culmination to three years of Maryland pride and public education for the bicentennial remembrance of the Star-Spangled Banner and the War of 1812 in Maryland.

Governor O'Malley and Maryland's War of 1812 Bicentennial Commission and Star-Spangled 200, Inc. created a series of events which traced the history of the war throughout the State of Maryland. The commemoration commenced with Star-Spangled Sailabration, June 2012. It was 200 years earlier that the U.S. led by President James Madison declared war against England- the War of 1812.

Sailabration attracted 1.54 million visitors to Baltimore City and County. The week-long event included 46 tall ships from 12 nations, navy vessels, U.S. Navy Blue Angels, and festival villages. The inaugural bicentennial commemoration had rave reviews, increased the local business volume by \$97.72 million and had a total economic impact of \$166.1 million.

The British brought war to the Chesapeake region in 1813 and 1814. Under the orders of Rear Admiral George Cockburn, the British blockaded the Chesapeake and attacked towns and villages including Havre de Grace, St. Michaels, and Elkton.

The Chesapeake Campaign of 2013-2014, a series of commemorative festivals along the Star-Spangled National Historic Trail, shadowed the marauding British Navy's attack on the Chesapeake and preserved the memory of our valiant young country's citizen defenses. The Chesapeake Campaign events were charged with a stunning amount of civic output and coordination that highlighted Maryland communities around the Bay and generated significant economic impact.

On September 12, 1814, the British fleet approached Baltimore at North Point where 4,500 troops landed and began their 11-mile march to Baltimore. As the troops began their land attack, British warships moved up the Patapsco River toward Fort McHenry. After 25 hours of bombardment of the fort, American troops failed to surrender but instead raised the American flag in triumphant defiance.

What Francis Scott Key so passionately preserved in his penning of the Star-Spangled Banner was the incredible story of victory over the world's then most powerful military force. With the U.S. capital in flames – it would have been no surprise if Baltimore had suffered a similar lot in 1814. The heroics that led to the victory in Baltimore Harbor continue to inspire visitors today.

Star Spangled Spectacular in its entirety spanned seven days and provided activities and education that highlighted the significance of Maryland's pivotal national heritage story, its historic places and people, along with its spectacular waterways, neighborhoods, restaurants and attractions. The harbor was filled with 33 ships from 7 countries offering free public tours. Visitors had access to an incredible variety of vessels, from tall ships to the US Navy's most advanced naval technology.

II. The Framework

The assessment of the economic impact of Spectacular, just as other Maryland War of 1812 Bicentennial events, is a complex undertaking and the accomplishment of this task requires a systematic approach. The intent of this framework section is to acquaint the audience with the approach used.

A. Purpose of Study

Forward Analytics, Inc. was contracted by Star-Spangled 200, Inc. ("SS200")² to conduct audience research for key signature events between June 2012 and December 2014 commemorating the War of 1812 Bicentennial and to measure the economic impact of the events. This report provides analysis and impact measurement for Spectacular, the grand finale of events celebrating the end of the War of 1812 and the 200th anniversary of our national anthem, September 10th-16th.

The Baltimore economy depends on the revenue, employment, and income that festivals and special events bring to the City. Evaluating the impact of Spectacular is crucial to analyze the return on investment (ROI) for the citizens, event managers, sponsors, government entities and the affected communities. In addition to the standard economic impact questions, audience research was designed to measure the following:

- overall event satisfaction;
- socio-graphics and psychographics of attendees;
- attendance motivators;
- interest in the history of the War of 1812 and its commemoration events;
- communications and marketing activities,
- and sponsorship awareness.

B. Methodology

The study utilized a customized survey to collect data from a random sample of Spectacular visitors. Prior to the bicentennial kick-off, Forward Analytics collaborated with staff from SS200, the Commission, Visit Baltimore, and the Maryland Office of Tourism to create a 3-page survey template. The questionnaire was customized for each of the signature events for which audience research was conducted.

Forward Analytics administered in-person interviews to 1,644 adult attendees (ages 18+) during 6 of the 7 days of Spectacular. The sample size represents a statistical significance of +/-3.5% margin at the 95% confidence interval. This allowed analysis at the 90% confidence interval, with a +/-3.5% margin of error. Generally, a +/-5% margin of error at a 95% confidence level is considered significant for making business decisions.

² Star-Spangled 200, Inc. is the non-profit 501 (c) (3) organization that supports the fundraising goals of the Maryland War of 1812 Bicentennial Commission ("Commission") and is charged with helping to ensure the realization of successful programs, events and community investment during the three-year commemoration period. Established by Governor Martin O'Malley, the Commission is staffed by the Maryland Department of Business and Economic Development, Division of Tourism Film and the Arts. The bicentennial period runs from June 2012 through February 2015. It commemorates Maryland's unique contributions to the defense and heritage of the nation, including the pivotal battle that led to an American victory and the birth of "The Star-Spangled Banner."

In order to gather representative data, Forward Analytics conducted surveys during diverse hours of the day and at various sites including festival villages and where tall ships, Navy ships, aircraft and the Blue Angels could be observed. These locations included Inner Harbor, Fell's Point, and Martin State Airport. (Because of federal regulations, surveys were administered outside, not inside, Fort McHenry.)

In addition to the audience survey, a 2-page impact questionnaire was distributed to non-local Spectacular sponsors, vendors and event affiliates. The survey measured the costs to partake or do business at Spectacular events and evaluated the amount of new money spent exclusively in the local community. More specifically, event affiliates were asked to indicate dollars spent locally on advertising and promotions, cost of products sold, payroll, as well as accommodations and travel attributable to the event.

Forward Analytics also conducted interviews and collected pertinent data from downtown hotels, restaurants, transportation, retailers, marinas and tourist attractions. A questionnaire was distributed to measure the change in business volume and revenue during the dates of September 10th-16th in 2014 vs 2013. The purpose of the data was to validate visitor impact measured by survey research and to recognize that Spectacular did, in fact, increase local business revenue.

Lastly, the methodology incorporated detailed information supplied by SS200. The event planners reported back the expenditure levels and geo-spatial distribution (spending locally vs. non-locally) along with staffing and other related economic information. In summary, the economic reporting utilizes survey research to measure direct impact, or business volume, generated by three sectors: a) Spectacular visitors, b) sponsors/vendors, and c) SS200 and partner organizations.

C. The Economic Impact Model

The economic impact study measures the direct and indirect business volume and government revenues attributed to Spectacular. This impact study employs a linear cash flow methodology first developed by Cafferty & Isaacs for the American Council on Education. The Cafferty & Isaacs methodology is the most widely-used impact study tool and has been used throughout the United States in impact analyses for both profit and not-for-profit organizations, corporations, institutions and events.

The economic impact of a special event is largely a function of the spending made by the visitors. When calculating the economic impact of an event, it is necessary to know the crowd size or attendance. Spectacular was a one-time, seven-day free event spread out over multiple venues. While there were no ticket sales or admission gates to quantify people participating in Spectacular events (except for the Pier 6 Concert), we used several reliable sources to accurately estimate crowd size. These include the Mayor's Office of Emergency Management, Baltimore City Fire Department MIS/GIS, Visit Baltimore, Baltimore Office of Promotion and the Arts, Sail Baltimore, in addition to Commission and SS200 staff.

The group analyzed aerial photos illustrating crowd density (as well as the area of available space and proportion of the space that is occupied), factoring in crowd ebb and flow during the course of each day and the variations in weekday and weekend visitation. The crowd total also incorporated survey data from the questions pertaining to

length of time spent in Baltimore, top activities while participating in Spectacular, and reference data supplied by such partners as the National Park Service and Martin State Airport. Based on all available data, Spectacular drew an estimated 1.43 million visitors over seven days.

Economic impact generally measures *new money* brought into the economy by out-of-area visitors. Spending by local residents (residing in Baltimore City) represents a redistribution of existing money in the community and is not included in this study. Survey research reveals that 24.2% of Spectacular visitors reside in Baltimore City. That said, 75.8% of Spectacular visitors spent “new dollars” and impact the local economy as outlined further in this report.

The linear cash flow model that we use in this study takes into account the re-spending of money within the economy as a result of what professional economists term “the multiplier effect.” The multiplier effect measures the indirect impact, or the circulation of dollars originally attributable to Spectacular, and tracks their spending by successive recipients until the funds eventually leak out of the economy. The sum of these direct and indirect expenditures represents the total impact of Spectacular on the local business volume.

The direct impact, or the direct spending, of Spectacular visitors generates government revenues for the City and State. Spectacular-related taxes are calculated herein.

III. Research Findings

The tourism economy is vital to Baltimore City and its Region. Tourism supports jobs for more than 139,000 Marylanders with a payroll of \$4.6 billion and generates \$2.1 billion in state and local taxes. *Source: Tourism Economics.* While commemorating Maryland's War of 1812 Bicentennial and the National Anthem, Spectacular's mission was to showcase Maryland, invite Americans to the Inner Harbor/downtown area, and generate tourism and tourist dollars.

Festivals like Spectacular have been recognized as one of the most important areas of the tourism industry, and they have contributed to their host communities in a number of ways: creating economic impact, enhancing the overall image of the destination, and creating community involvement. Festivals have also provided the community with the recognition of the destination. When visitors have a positive experience in the host community, they will return to that destination in the future. Inherently, festivals not only generate economic activity during the scheduled days of the festival but also when visitors return to the destination.

Certainly, the pride and excitement from Spectacular will be exploited to further attract non-resident tourists as well as Marylanders to the Inner Harbor/downtown area. But knowing demographics and travel motivations is essential for successful tourism planning and destination management.

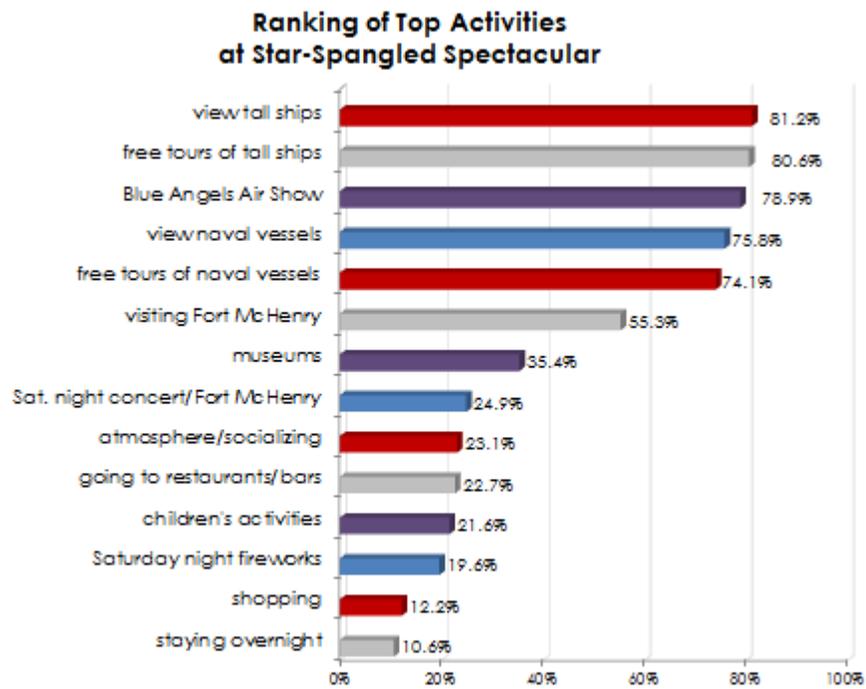
A. Demographics and Attendance Information

A goal of the Maryland War of 1812 Bicentennial Commission is to “*ensure all Marylanders have the opportunity to participate and benefit from bicentennial activities.*” Research shows that more than 1.2 million Marylanders experienced Star-Spangled Spectacular, while another 213,500 visitors came from out-of-state. We

previously indicated that 24.2% of Spectacular visitors reside in the City of Baltimore and 12.8% reside in Baltimore County.

Visitors to Spectacular absorbed the activities and environment around them- they were not in a rush to go anywhere. Eighty percent of visitors said Spectacular and its events were the “main reason to be in the area today.” Moreover, 48.4% revealed they would NOT have visited Baltimore (today) if there were no Spectacular. The patriotic commemoration attracted an estimated 205,000 first-time visitors.

The top five activities of Spectacular were viewing the tall ships (81.2%) and free tours of the tall ships (80.6%), Blue Angels air show (78.9%), viewing the naval vessels (75.8%) and free tours of the naval vessels (74.1%).



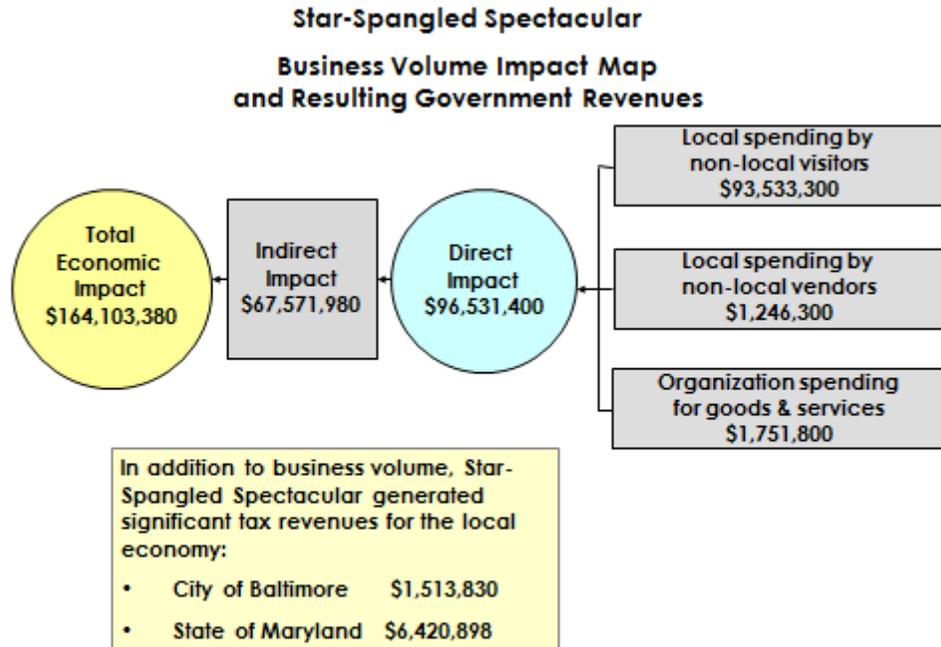
The unique layering of activities in and around Inner Harbor/downtown captured the majority of visitors (64.4%) for 5 or more hours. Remarkably, 68.1% of visitors spent more than one day enjoying Spectacular. In fact, 30.4% of survey respondents spent 4 or more days at Spectacular.

Spectacular attracted people of all ages. While 28.5% of visitors were ages 50+, the under 35 crowd enjoyed the event as well and represented 41.9% of visitors. People generally attended Spectacular with a group of friends and family. The group size averaged 3.28 people, of whom 2.75 were adults and .53 were children.

Spectacular attendees tend to be well educated- 64.7% are college graduates (ages 21+). Approximately 21% have attained a post graduate degree. Slightly more than one-fourth of visitors reported having an annual household income above \$75,000.

B. Economic Impact Findings

The total economic impact of Spectacular is estimated at \$164.1 million for the 7-day commemoration. Spectacular increased the business revenue by \$96.5 million in direct impact and \$67.6 million in indirect impact. With event production expenditures totaling \$4.57 million, that means for every \$1 spent, more than \$35 was generated in direct and indirect impact for the Maryland economy.



1. Business Volume: The Direct and Indirect Expansion of the Local Economy Attributable to Spectacular

The direct economic impact, or “first-round” spending, of 2014 Spectacular is estimated at \$96.5 million. This figure is the sum of a.) visitor spending, b.) vendor spending, and c.) SS200 advertising and event-host spending. Additionally, these “direct” expenditures are re-circulated in the City and County economies as recipients of this first round income re-spend a portion with other businesses in the local area. Thus, the “indirect” impact of Spectacular is estimated at \$67.6 million.

a. Spending by Visitors to Spectacular

The total economic impact of visitor spending (those who do not reside in the Baltimore City/County) in the Baltimore region attributable to Spectacular is estimated to be \$159 million. The total economic impact consists of \$93.53 million in direct impact and \$65.47 million in indirect impact.

The following chart illustrates the economic impact of non-local visitors who traveled to Baltimore to experience Spectacular. The chart provides a breakdown of revenue at local restaurants, retailers, museums, attractions, hotels, etc. generated in

Baltimore City and Baltimore County. Each non-local visitor spent an estimated \$86 while enjoying Spectacular.

	Baltimore City	Baltimore County
Food at restaurants/bars	\$37,723,600	\$3,422,600
Alcohol at restaurants/bars	\$3,859,200	\$621,100
Retail/souvenir purchases	\$11,568,900	\$740,100
Tourist attractions and entertainment	\$9,045,900	\$522,100
Overnight accommodations	\$7,248,900	--
Parking	\$5,969,700	\$388,300
Gasoline	\$8,199,800	\$1,421,200
Ground or water transportation (bus, taxi, car rental, etc.)	\$2,153,300	\$648,600
Visitor Spending Direct Impact	\$85,769,300	\$7,764,000
Indirect Impact	\$60,038,510	\$5,434,800
Total Impact	\$145,807,810	\$13,198,800

b. Spending by Sponsors and Vendors

In addition to sponsorship dollars or vendor fees, Spectacular affiliates contributed to the local economy during the seven-day festival and beyond. Survey research with the non-local event affiliates measured the costs to partake or do business at Spectacular and evaluated the amount of new money spent exclusively in the community. Sponsors and vendors had expenses that included cost of product, materials, booth equipment, advertising, printing and giveaways. Furthermore, they were asked to indicate dollars spent locally on accommodations and travel attributable to the event.

The estimated direct impact of non-local sponsors and vendors in aggregate on the Baltimore economy is \$1.25 million. The indirect impact of vendor spending generated an additional \$872,410 for the local economy. Thus, the total impact of vendor spending on Baltimore's economy is \$2.12 million.

c. Spending by SS200 and Partner Organizations for Vendors, Services, Products, etc.

Next, the operating expenditures of the event's host, SS200, and partnering groups are considered³. SS200 and partners spent a total of \$4.57 million on activities including program expenses, marketing and administrative costs. This category of economic impact also includes the purchase of goods and professional services from local businesses with money from the organization's operating budget. Spectacular supported over 100 local vendors with an estimated \$1.75 million in reimbursements for their products and services. These direct expenditures moved through the local economy and generated an additional \$1.23 million in indirect impact. The total local economic impact for organizational spending is \$2.98 million. (These figures take into account leakage for money that was spent outside of the local economy.)

Spectacular was a public-private partnership, funded by the State of Maryland and corporate sponsors. Corporate sponsors underwrote a wide variety of programs and events, ranging in value from \$5,000 to \$100,000. In addition to programs and events, SS200's multi-year *Presenting Sponsor* and *Founding Partners* activated their brands through promotions and an event-wide recognition program. Seventy-four percent of private dollars invested in Spectacular and SS200 came from corporations headquartered outside of Baltimore City and County. This represents new dollars that, in turn, generate direct and indirect revenue for the City of Baltimore and Baltimore County.

2. Impact on Local Government Revenues: Revenues Received by the City of Baltimore and State of Maryland Allocable to Spectacular

When an event such as Spectacular brings people and an influx of money into the area, tax revenues are generated for local and state governments. Tax revenues are paid directly by visitors on purchases such as retail, food and drinks, overnight lodging, gasoline and parking. **This study only measures the government revenues generated from the direct impact of Spectacular. It does not measure the government revenues generated by the indirect impact of the event, nor does it consider revenue enhancements resulting from increases in employment (i.e., income withholding and unemployment taxes).**

The State of Maryland received an estimated \$6.42 million in tax revenue from the direct economic activity generated by Spectacular. The City of Baltimore gained an estimated \$1.51 million in tax revenues. The government revenue impacts attributable to Spectacular comprise the following:

a. Sales Tax

As previously indicated, Spectacular visitors spent an estimated \$95.53 million at restaurants, retailers, tourist attractions, etc. in the City of Baltimore and beyond. Based on this figure and the Maryland state sales tax of 6 percent, Spectacular visitors generated \$5.61 million in sales tax revenues for the State of Maryland. The 3% sale and use tax on alcohol generated another \$134,400 for the State.

b. Hotel Tax

³ This study did not measure expenditures by partner organizations such as the U.S. Navy, the Blue Angels, and foreign navies. However, these visiting entities have indicated substantial spending in the Maryland economy on provisions and services.

Spectacular attracted a significant percentage (63%) of visitors *who reside outside of the city and county* to the Inner Harbor/downtown. These visitors generated income for the hotel community and also generated hotel room tax revenues for the local government.

Survey data combined with STR- hotel benchmarking reports determined that overnight visitors accommodated approximately 42,159 room nights over the 7-day Spectacular resulting in a direct impact of \$7.25 million in the local economy. The direct spending on accommodations resulted in \$543,667 in hotel tax revenue for the City of Baltimore.

Spectacular sponsors, vendors and affiliates filled over 700 hotels rooms in Baltimore during and beyond the seven days of the event. While their spending brought in an estimated \$108,700 in local hotel revenue, it generated \$8,152 in hotel tax for the City of Baltimore. In addition, SS200 spent an estimated \$90,800 with local hotels leveraging \$6,810 in City hotel tax.

In total, the City of Baltimore gained an estimated \$558,630 in hotel tax revenue attributable to Spectacular.

c. Parking Tax

With an inflow of tourists traveling to the Inner Harbor/downtown Baltimore, survey data measured an estimated \$5.97 million which was spent on parking in the City. This impact generated approximately \$955,200 for the City of Baltimore.

d. State Gasoline Excise Tax

Tourists (nonlocal) spent an estimated \$9.6 million in gasoline while traveling to and from and throughout Baltimore City and County. A gasoline excise tax of \$.235 per gallon generated \$674,900 for the State of Maryland.

3. Additional Impacts Allocable to Spectacular

The above information demonstrates that Spectacular largely increased business volume revenues in the Baltimore region. We must acknowledge additional impacts allocable to Spectacular—employment and community service. It is within these domains that a host of monetary and social transactions take place and ripple throughout the City of Baltimore and the region, directly and indirectly, enriching the lives of Baltimore residents.

a. Impact on Employment: Expansion of Local Employment Attributable to the Direct and Indirect Impact of Spectacular

Many of the local economic benefits attributable to Spectacular have been highlighted already in this report. But perhaps what strikes close to home is the sheer number of Baltimore residents who rely on tourism, either directly or indirectly, for their jobs or livelihood and household income. The \$96.53 million in direct spending attributable to Spectacular generates an additional \$148.35 million in Maryland's employment wages⁴ supporting 3,974 FTE at an annual salary of approximately

⁴ Forward Analytics utilizes the Gross Employment Multiplier of 1.5368 generated by United States Bureau of Economic Analysis to determine the employment wage impact.

\$37,300. The impacted industries include tourism and hospitality, but also comprise other major employment sectors like construction, manufacturing, transportation and warehousing, professional, health care, etc.

b. Impactful Volunteerism

Establishing the vision and direction of an important community event, such as Spectacular, could never be accomplished without the support and participation of many volunteers. Their involvement enhanced the scale of Spectacular and enabled a multi-faceted event to effectively serve many community objectives. Undoubtedly, their heartfelt efforts enhanced the social, economic, and educational impacts of Spectacular.

An overwhelming 1,570+ spirited volunteers are to be commended for all their efforts and the many hours they gave to help make Spectacular a success. Volunteerism occurred through several organizations, including Baltimore Office of Promotion & the Arts, Sail Baltimore, Visit Baltimore, Friends of Fort McHenry, and ComRel (Navy community relations). Volunteers provided guest services, sold merchandise, and assisted with ship tours, *to name a few activities*. They donated an estimated 5,992 volunteer work hours.

Appraising the exact dollar amount is less critical than the notion that those who volunteered their time could have spent it in many ways but decided this event was of key importance and worth donating their time. If the total of 5,992 volunteer hours is calculated at the *government dollar value of a volunteer hour (2013)*, an estimated \$152,376 is donated in time to Spectacular, the City of Baltimore and its residents.

c. Educational Impact

In 2009, when commemoration events were in embryonic planning stages, Visit Baltimore fielded a national omnibus survey question asking “in which city was the Star-Spangled Banner written” to determine the level of awareness in the general population with Baltimore’s role in the writing of the National Anthem. This question was fielded again in 2013 and 2014 by SS200.

Twenty-five percent of the U.S. population correctly identified Baltimore or Maryland as home of the Star-Spangled Banner in 2009. The question was fielded again in 2013 and 31% of the population correctly associated Baltimore or Maryland with the Star-Spangled Banner. The question was fielded one week after Spectacular and 39% of the population identified Baltimore or Maryland with the Star-Spangled Banner.

“In which city was the Star-Spangled Banner written?”

YEAR	% CORRECT
2009	25%
2013	31%
2014	39%

Clearly the Spectacular public relations efforts were successful. Yet, Marylanders want more. Perhaps more so than Sailabration in 2012, Spectacular visitors came to the event with a purpose- to acquire knowledge about Maryland’s role in the War of 1812 and the history of our National Anthem.

Audience research performed by Forward Analytics was utilized to evaluate the extent to which Spectacular sparked the interest of visitors to learn about Maryland's significance and relevance to the War of 1812. Data analysis indicated that 75% of Spectacular visitors are, in fact, interested in learning more about the legacy of the Star-Spangled Banner.

Sixty-three percent are interested in exploring the Star-Spangled Banner National Historic Trail connecting War of 1812 sites. And another 27.2% are somewhat interested. The historic trail is a significant marketing tool for Maryland's charming small towns, coastal areas, and historic cities. To help expand the tourism-related economies in the various towns, audience research evaluates several strategies and initiatives designed to increase Historic Trail visitation and enhance the visitor experience.

Interesting sites, alone, would entice 76.5% of survey respondents to explore the trail. Recreational outlets (hiking, biking, paddling, etc.) would motive 34.7% of respondents, while 36.1% are motivated through rewarding programs and events. Those interested expressed the need for both print-based and electronic marketing tools, like a robust website and downloadable materials (18.0%), mobile app (17.1%), and printed guides (16.9%). Clear interpretive and wayfinding signs are important to 11.2% of respondents, and 6.2% are intrigued by connect-the-dots (i.e., scavenger hunt) activities to promote and navigate the Historic Trail.

Maryland's War of 1812 Bicentennial Commemoration events provided powerful publicity and broad marketing awareness for the Historic Trail. Now planners are challenged with designing new campaigns (or continuations) that will build upon the momentum. The survey findings reveal that Bicentennial events generated strong visitor enthusiasm. The survey findings provide insight into visitor demographics and a breakdown of interests that might feed future creative programs and attract commercial partners.

C. Marketing Impact

Star-Spangled Spectacular was a celebration of the 200th anniversary of our national anthem and the concluding events of the War of 1812. Tall ships, Navy gray hulls and the Blue Angels came to Baltimore's famed Inner Harbor, with the culminating event of a nationally-televised, star-studded concert at Pier Six Pavilion - including an immense fireworks display - capping the festivities. The President of the United States made a surprise visit. All eyes were on Maryland.

Together Visit Baltimore and the Maryland Office of Tourism created and purchased more than \$1.47 million in television, print, billboard and radio advertising reaching 125+ million people in important tourism markets (DC, Philadelphia, New York, New Jersey, etc.). The results show over \$33 million in earned media, 2,025 news stories and 2,235,305,446 circulation impressions, that included key messages about Baltimore and Maryland as the birthplace of the national anthem in outlets including, World News Tonight, ABC This Week, Good Morning America, CBS Sunday Morning, Sunday Night Football, Fox Football Sunday, CBS Saturday Morning, Tonight Show with Jimmy Fallon, among others.

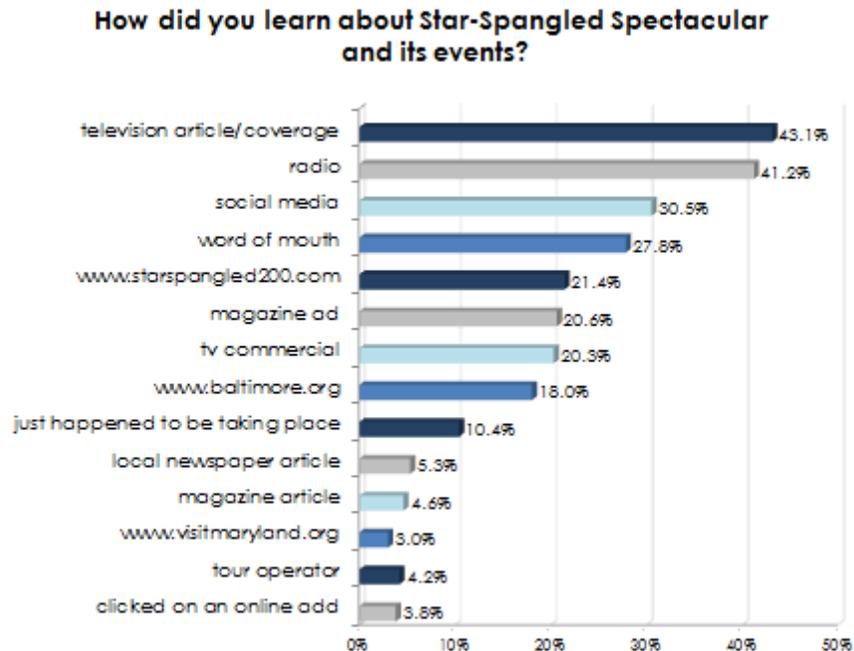
Maryland Public Television (MPT), in partnership with Dick Clark Productions, presented *Star-Spangled Spectacular: Bicentennial of our National Anthem*, a concert special honoring the 200th anniversary of our national anthem. The live broadcast on PBS stations nationwide took place at Pier Six Concert Pavilion and Fort McHenry National Monument and Historic Shrine on Saturday, September 13. Baltimore's harbor, replete with tall ships and naval vessels served as a stunning backdrop for the celebration.

The two-hour event, hosted by John Lithgow, co-hosted by Jordin Sparks, featured performances from Kristin Chenoweth, Melissa Etheridge, Denyce Graves-Montgomery, Little Big Town, Pentatonix, Smokey Robinson, Kenny Rogers, Train, the Baltimore Symphony Orchestra, the U.S. Marine Band and the Morgan State University Choir, and presentations by Vice President Joe Biden, Navy Secretary Ray Mabus, Governor O'Malley, Brooks Robinson, Jim Palmer and other Maryland notables. These individuals paid tribute to our nation's ideals in a patriotic program that included a flag ceremony at Fort McHenry, historical highlights, and included an extraordinary fireworks crescendo.

This live television broadcast highlighting Baltimore and Maryland was viewed same day by 517,000 households and cumulatively by 1.68 million households and 1.88 million people (age 2+) in the first 7 days—and the rebroadcasts continue as of this writing.

1. Visitor's Use of Media

Despite the rise in social media and ease in availability of other electronic media, 'traditional media' was ranked as the top promotional tool used by visitors to learn about Spectacular- just as Sailabration 2012. More specifically, television coverage and radio proved to be the top 2 effective channels of promotion. Yet there was significant increase in the use of social media to learn about Spectacular and its events. In fact, there was a 400% increase in the number of visitors using social media for Spectacular information when compared to Sailabration.



To make social media an effective communication tool for Spectacular visitors, a Social Media Command Center (SMCC) was established with the goals of providing and managing public information content, acting as real-time customer service, and working in concert with public safety command center. SMCC can claim these successes:

Facebook	Increase in fan base from 5,795 to 11,398
Twitter	Increase in followers from 1,698 to 3,660
Instagram	Increase in followers from 96 to 608

Furthermore, social sharing behaviors extended the reach of advertising and impressions generated at Spectacular. SS200 had built social media accounts with robust followings in Facebook, Twitter, and Instagram for event promotions as well as a communication tool during the event. Twitter earned 770.4k impressions during Spectacular and the three weeks leading up to it. Instagram showed 4,084 photos posted with hashtag #StarSpangled200.

Google reported that "Star-Spangled Spectacular" was among the top 10 trending searches and top 10 trending events/news searches in Baltimore in 2014. Website analytics demonstrated that www.StarSpangled200.com had over 483,740 visits September 3rd-16th including 339,540 unique visitors. The Saturday of Spectacular drew over 103,000. The most frequented pages were Spectacular Landing Page, Detailed Schedule of Events, Spectacular Home Page, Air Show, and Visiting Ships. The site used a responsive design for desktop users (45%), mobile users (43%) and tablet users (12%).

Baltimore Sun actually called Spectacular a "data hog" citing a 60% increase in data usage in the area between Friday and Sunday, as compared to the previous year. AT&T added additional capacity using special equipment in and around the festivities. AT&T said attendees of Spectacular used more than 123 gigabytes of data from Friday through Sunday. The company described the data usage as the equivalent of more than 400 hours of streaming HD video.

2. Tourism Impact

Tourism business in Baltimore and throughout the country typically slows down in late August and early September as summer ends and school begins. But Spectacular, September 10th-16th, brought one more boom to tourism in Baltimore with a strong showing of patriotic visitors particularly on the weekend of the event.

Certainly, the scheduled Ravens and Orioles games were a real draw to Inner Harbor and downtown. But it was the tall ships, Blue Angels and other bicentennial events that brought people in swarms to Fells Point, Locust Point, and Canton, as well as Inner Harbor. There are countless testimonials, as well as statistics, demonstrating the positive impact that Spectacular had on local attractions and tourism and hospitality as a whole. Though Saturday's rain was a big disappointment to many, Inner Harbor restaurant and attractions increased revenue as visitors sought a dry haven. Here are a few passages regarding Spectacular's positive impact on tourism:

"The Spectacular brought literally thousands of people to our community"

Gret Sileo, president, Locust Point Civic Association
The Daily Record 9/17/14

"At Smaltimore (in Canton) business was up 20 percent"
Jason Zink, owner
Baltimore Business Journal, 9/14/14

"Little Havana in Federal Hill did about 20% more business than on a usual weekend."
Marc Gentile, co-owner
Baltimore Business Journal, 9/14/14

"The Rusty Scupper had about double the normal number of reservations."
Ed Prutzer, general manager
Baltimore Business Journal, 9/14/14

Other success measures include hotel reporting where Baltimore's hotel occupancy and rate throughout the week of Spectacular are high- over 95% occupancy on Thursday and Saturday and average daily rates above \$200 on Friday and Saturday.

Public transportation got a rush during the days of Spectacular. The seven-days brought one transportation company a 307% increase in ridership and 376% increase in revenues (compared to the same days in 2013). A historic attraction in Inner Harbor saw a 150% increase in visitors and 118% in revenues. Another Inner Harbor attraction experienced a 588% increase in visitors and 342% in revenues.

D. Salute the Sponsors

A historic commemoration and festival the size and scale of Spectacular could not have occurred without the good citizenship of its corporate sponsors. Several major U.S. companies joined the State of Maryland in a three-year effort to commemorate the Bicentennial of the War of 1812. Corporate sponsors played a significant role in the development, planning and execution of Maryland War of 1812 events and committed over \$5 million honoring Maryland's unique place in history, the birthplace of our National Anthem.

No doubt, Spectacular's sponsors were pivotal in making history matter. These companies believe that it is important to give something back to the communities in which it does business. Their contributions allowed 1.2 million Marylanders to better understand their State's unique place in American history and the birthplace of the Star-Spangled Banner.

200 years later, the Star-Spangled still has emotion and power. The seven days of Spectacular were charged with patriotic spirit. These emotions undoubtedly had a positive outcome on sponsoring companies.

Survey research tested the awareness and emotions visitors formed with the sponsors of Spectacular. First, *unaided* sponsorship awareness is measured. Visitors were asked, "When you think of Star-Spangled Spectacular sponsors, which companies or brands

come to mind?" Spectacular visitors had notable awareness of the corporate sponsors as nearly one-third of visitors (31.2%) identified two or more sponsors as *top-of-mind*.

Next, we measured aided awareness of sponsorship. Survey respondents were presented with a list of companies/brands and asked, "Which of the following do you recognize as sponsors of Star-Spangled Spectacular?" AT&T (recognized by 48.1% of respondents), Papa Johns (46.2%), and M&T Bank (39.2%) ranked on top for building a strong brand through their sponsorship.

Today, more than ever, we have come to appreciate and value the relationships that can be forged between individuals, organizations, and communities. Survey research further demonstrates the combination of awareness, favorability and effectiveness is unparalleled for Spectacular sponsors. Respondents were presented with a series of "emotional" and "attitudinal" statement pertaining to Spectacular sponsors then asked to what level they agree or disagree. Here are the reactions:

- **Spectacular visitors recognize and appreciate sponsors' contributions.** The majority of visitors (93.1%) *strongly agree* or *agree* that corporate sponsorship made Spectacular possible.
- **People think more positively of sponsors associated with causes to popular events.** 97.8% of visitors indicated having a positive attitude toward Spectacular sponsors because of their association.
- **People respond better to sponsorship than other advertising.** 92.9% of visitors felt that Spectacular sponsorship is a better way to reach them- more than through traditional advertising.
- **Spectacular sponsorship can drive sales and enhance customer loyalty.** 87.9% of visitors are more likely to purchase brands from Spectacular sponsors because of their association.
- **Sponsorship played a significant role in enhancing Baltimore's image and economy.** 99.5% of visitors agreed that Spectacular added value to the Region.
- **Sponsors benefit from the positive association visitors developed with a well-liked event.** Spectacular was a positive experience as 89.5% of visitors were *very satisfied* or *satisfied* with the event.