

ECONOMIC IMPACT & AUDIENCE RESEARCH REPORT

Prepared by Forward Analytics



2014

CHESAPEAKE CAMPAIGN

Battle of Bladensburg



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Highlights of the Study

- The Bicentennial Commemoration of the Battle of Bladensburg attracted an estimated 2,500 to the waterfront of the Anacostia River near the site of the battle where the Americans were defeated allowing the British to burn the U.S. Capitol and the White House. While the battle was devastating the bicentennial re-enactment was not. Visitors enjoyed activities such as living history, performers, children's activities, and river boat tours.
- Unfortunately the weather for the bicentennial event experienced heavy rain throughout the day, which detracted visitors.
- The Battle of Bladensburg was supplemented by a \$64,100 grant from the Maryland War of 1812 Bicentennial Commission. In return, the bicentennial commemoration generated \$110,974 in total economic impact for the State of Maryland.
- Forty-seven percent of event visitors came from outside of Prince George's County and spent \$23,487 with local restaurants, hotels, retailers, etc. Local spending generated an additional \$16,441 in indirect impact. Thus, the total impact of the Battle of Bladensburg in Prince George's County is estimated at \$39,926.
- The Battle of Bladensburg also increased business revenues statewide- outside of Prince George's County but within the State of Maryland. Commemoration visitors increased business revenue throughout the state by \$41,793. The recirculation of the direct impact produced an additional \$29,255 in indirect impact which makes a total economic impact of \$71,048 generated elsewhere in Maryland as a result of bicentennial events.
- The direct spending by visitors to the Battle of Bladensburg resulted in substantial tax revenues for the State of Maryland. Sales tax, alcohol tax and gasoline excise tax brought in an estimated \$4,485 for the State.
- The majority of survey respondents indicated War of 1812 and Bicentennial activities (73.2%), museum and historic sites (57.1%) and the food truck rally (49.3%) were most important to them during their trip to Prince George's County. Thirty-one percent of visitors dedicated more than one day to the Battle of Bladensburg bicentennial events.
- The Battle of Bladensburg fostered interest in the history of the Maryland War of 1812. Eighty percent of survey respondents indicated they are *very interested* or *interested* in learning more about the history of the Maryland War of 1812. Consequently, 67.0% indicated they were likely to participate in other events commemorating the War of 1812.
- Survey research proved that the Bicentennial Commemoration of the Battle of Bladensburg was a positive experience as an overwhelming 80.1% of visitors were *very satisfied* or *satisfied* with the events.

I. Introduction

Two hundred years ago, the British Navy launched its "Chesapeake Campaign" looting, burning, and causing economic devastation in towns along the Bay. Now dozens of Maryland communities share a national story of triumph which began in April 1813 when the British began their assault at the head of the Bay and climaxed September 1814 with the successful defense of Baltimore.

The Chesapeake Bay was a prime target for the British because it was an important center for commerce, industry, and government. Washington, DC was the nation's capital and Baltimore, the third largest city in the United States, a seat of maritime trade, shipbuilding, and industry. The Campaign of 1814 was a significant period because the British occupied our nation's capital after the American defeat at the Battle of Bladensburg, but were repulsed during the Battle for Baltimore. The events of the campaign are significant to American history because of their pivotal effect on the outcome of the War of 1812 and their effect on far-reaching aspects of American society, including the young nation's identity.

In honor of the bicentennial, state and local officials supported dozens of War of 1812 programs and events. The vision was to educate the public through celebration and commemoration of historic events and to expand economic development and tourism-related job creation in the State.

The modern *Chesapeake Campaign* ran from May 2013 through September 2014 and featured a series of weekend festivals that included commemorative War of 1812 events, historic re-enactments, interactive activities, tall ships, and more. The *Maryland War of 1812 Bicentennial Commission* awarded over \$591,000 in grants for 10 events in eight counties in 2013 and 2014 to support the Chesapeake Campaign commemoration. The festivals enticed tourists to explore Maryland's charming small towns and historic cities, each filled with galleries, shops, lodging and restaurants.

Forward Analytics, Inc. was contracted by Star-Spangled 200, Inc. ("SS200")¹ to conduct audience research for key signature events between June 2012 and December 2014 commemorating the Maryland War of 1812 Bicentennial. The primary research goal was to measure the economic impact generated by the events. Such information is crucial to analyze the return on investment (ROI) for citizens, event managers, sponsors, government entities and the affected communities.

Audience research was also utilized to evaluate the extent to which Chesapeake Campaign events provided Marylanders, and tourists, engaging opportunities to learn about and stimulate interest in the State's significance and relevance of the War of 1812.

¹ 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 multi-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 ran from June 2012 through September 2014. 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."

II. The Framework

The Battle of Bladensburg commemoration, known as the “Undaunted Festival,” was part of a multi-year planning process to develop infrastructure and goals for the Port Town area (the towns of Bladensburg, Cottage City, Colmar Manor, and Edmonston). Out of this planning process, the participants developed a plan that would include interpretive signage, walking tours, banners, streetscaping, a new monument, and the capstone “signature program.” The Undaunted Festival was made up of a week of programs leading to the Saturday event. Tuesday had a lecture at Riversdale House Museum, Thursday was War of 1812 Night at the Bowie Baysox, and Friday was the John Bull Roast at Riversdale House Museum. The festival would include the re-enactment which had typically been held at Riversdale House Museum, as well as food trucks, activities, an encampment, information tents, music, tours, and end with fireworks. Also planned for the day was the dedication of the new Undaunted monument with dignitaries, the Marines, and special guests. On Sunday, events include a community wide open house with trolley tours.

A. Purpose of Study

In support of a more in-depth understanding of the positive impacts of the Battle of Bladensburg, SS200 retained *Forward Analytics* to measure its effect on the economy and generate an Economic Impact Report. The following research study provides tangible and reliable information to the economic and educational returns resulting from investments and spending on the Chesapeake Campaign events. It specifically explains the direct and indirect business volume and government revenues generated in Prince George’s County and the State of Maryland.

The purpose of the research was to measure the economic impact of the event activities and also to analyze audience research for the use of planning and promoting further historic and cultural events. In addition to economic impact analysis, audience research was designed to measure the following:

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

B. Methodology

The study employed a customized survey to collect data from a random sample of Battle of Bladensburg visitors. Initially, *Forward Analytics* collaborated with staff from SS200, the Maryland War of 1812 Bicentennial Commission, Visit Baltimore, and the Maryland Office of Tourism to create a 3-page template survey that was ultimately retailed for each Chesapeake Campaign event.

In-person interviews were administered by *Forward Analytics* staff to 158 adult attendees (ages 18+) during the Battle of Bladensburg commemoration events. In order to gather representative data, *Forward Analytics* conducted surveys during diverse hours of the

day and at various spots of the festival. The data collected represents a 95% confidence interval with a margin of error at +/-7.68%.

In addition, the methodology incorporated detailed impact information supplied by event planners for Battle of Bladensburg. Maryland Milestones/ATHA Inc. reported back the event's expenditure levels and geo-spatial distribution (spending locally vs. non-locally) along with other social and cultural impact details.

C. The Economic Impact Model

The economic impact study measured the direct and indirect business volume and government revenues generated as a result of Battle of Bladensburg. The study employed 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. The economic study measured the impact of the bicentennial events in Prince George's County and the State of Maryland.

The linear cash flow model that was used 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 the representative events, and tracked the 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 on the local business volume.

The direct impact, or the direct spending, of visitors increased government revenues for the host county and State of Maryland and are calculated herein. Government revenues generated from bicentennial events include sales tax, alcohol sales tax, hotel tax, and state gasoline excise tax.

III. Research Findings

The Battle of Bladensburg bicentennial provided educational and social opportunities for residents while also attracting tourists to Bladensburg and Prince George's County. In total, an estimated 2,500 guests enjoyed the bicentennial remembrance of the Battle of Bladensburg. An estimated 1,327 "locals" participated in the commemoration while 46.9% of visitors (or 1,173 people) came from outside of Prince George's County. And 29.4% of visitors came from outside of Maryland. They traveled from surrounding states Virginia, Delaware, and Pennsylvania, but also outlying states, like Massachusetts and Tennessee.

The Battle of Bladensburg enticed first time visitors (14.3%) to Prince George's County, as well as frequent visitors, who generated substantial revenue for local businesses. While stimulating tourism, the Chesapeake Campaign events also educated guests and fostered interest in the Maryland War of 1812. Research demonstrates that the festivals provided engaging opportunities to learn that *"Maryland is recognized as the most important portal to understand the significance and relevance of the events of the War of 1812."*

Survey data shows that 79.6% of guests are interested in learning more about the history of the Maryland War of 1812. Sixty-seven percent of visitors indicated they were likely to participate in other events in Maryland commemorating the War of 1812. They were inclined to attend for reasons including:

- family-friendly, educational activities (50.0%),
- interest in War of 1812 (44.0%),
- pride in Maryland's history (34.0%),
- mere convenience (28.0%), and
- good entertainment (26.0%).

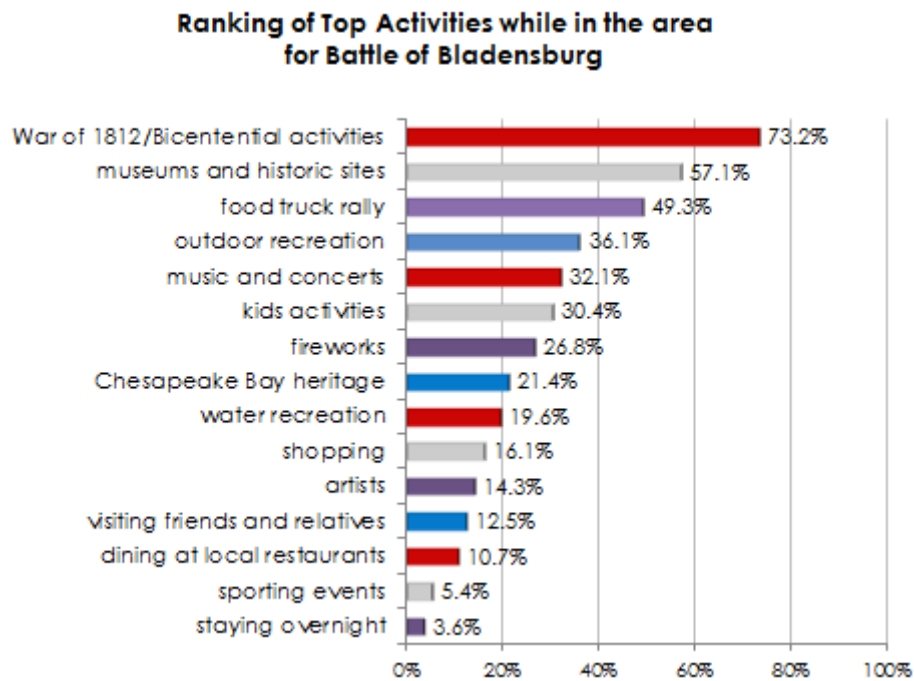
Specifically, 51% of survey respondents indicated they are very likely or likely to attend the Star-Spangled Spectacular, celebrating the 200th anniversary of our national anthem.

There is no doubt that Battle of Bladensburg bicentennial events elevated Prince George's County and Maryland as a premier location to live, work and visit. An overwhelming 80.1% of visitors rated the overall event as *very satisfactory* or *satisfactory*. The historic commemoration adds to the vitality and image of the county and state with press coverage and publications that extend beyond the local area.

A. Audience Research Findings

A goal of the Chesapeake Campaign events was to draw people to the small and charming towns along the Star-Spangled Banner National Historic Trail in Maryland. Seventy-three percent of survey respondents indicated that the Battle of Bladensburg was *very influential* or *influential* in deciding to visit the area.

Survey respondents were asked to indicate “up to 5 activities that are most important to you during your trip to Prince George's County.” Below is a ranking of the top activities. War of 1812 and Bicentennial activities (73.2%), museums and historic sites (57.1%), and the food truck rally (49.3%) were ranked highest.



Even though heavy rain interfered with Saturday's bicentennial activities, the majority of event visitors (77.5%) spend more than five hours in Prince George's County over the weekend. And 31.4% percent of guests dedicated more than one day to the commemoration.

Word of mouth (76.4%) and local newspaper articles (64.0%) proved to be effective advertisement for the Battle of Bladensburg. Internet marketing through social media (52.3%) and online articles (34.5%) also proved to be effective tools for informing and educating visitors about the bicentennial events. And www.princegeorges1812.org, informed 30.5% of visitors about the bicentennial events and itinerary.

With the proper messaging about events, research shows 56.1% of visitors were familiar that the Battle of Bladensburg was part of a *series of traveling festivals that trace the battle lines of the War of 1812 along the Chesapeake*. Even more, 61.4% of visitors were familiar that the events were *part of Star-Spangled 200, the bicentennial of the War of 1812 and the writing of the National Anthem*.

While pairs and threesomes comprised fifty percent of Battle of Bladensburg visitors, 14.8% came in groups of 10 or more. Thirty-five percent of survey respondents brought a mean of 1.05 children to the commemoration. These children range in age from 0 to 3 year olds (10.7%), 4 to 9 year olds (45.5%), 10 to 14 year olds (24.3%), and 15 to 18 year olds (20.0%).

The 50+ crowd made up 37.3% of guests while one-third were under age 34. More guests are married (54.7%) rather than single (35.9%). Sixty-five percent of guests had earned a four-year degree or higher while 68.2% have a household income of \$75,000 or more.

B. Economic Impact Findings

Visitors to the Battle of Bladensburg had a total economic impact of \$110,974 in the State of Maryland. In Prince George's County, the total economic impact of visitor spending is estimated at \$39,926. The total impact consists of \$23,486 in direct impact and \$16,440 in indirect impact for the County. Another \$41,793 in direct spending was generated elsewhere in Maryland. Direct spending was recirculated in the economy producing an additional \$29,255 in indirect revenue, with a total impact of \$71,048 generated elsewhere in Maryland.

	Prince George's County	elsewhere in Maryland
Food at restaurants/bars	\$11,825	\$18,236
Alcohol at restaurants/bars	\$1,360	\$2,051
Retail/souvenir purchases	\$4,383	\$10,759
Tourist attractions/ entertainment	\$1,020	\$2,614
Overnight accommodations	\$1,289	\$4,711
Parking	\$410	\$363
Gasoline	\$2,625	\$2,848
Ground transportation	\$574	\$211

Visitor Spending Direct Impact	\$23,486	\$41,793
Indirect Impact	\$16,440	\$29,255
Total Impact	\$39,926	\$71,048

Government Revenue Impact

Battle of Bladensburg increased local business volume and also generated substantial tax revenues for the local and state government. Tax revenues were paid directly by the nonresident guests on purchases with local businesses as mentioned above.

The State of Maryland received an estimated \$4,485 in tax revenue from the economic activity generated by the Battle of Bladensburg bicentennial events. Prince George's County gained \$390. The government revenue impacts comprise the following:

Sales Tax

As outlined above, Battle of Bladensburg generated substantial revenue for businesses in Prince George's County and the state of Maryland. Accordingly, direct spending by nonresident guests generated \$3,916 in state sales tax revenues for the State of Maryland.

Alcohol Sales Tax

Battle of Bladensburg attendees spent \$3,411 on alcohol at local restaurants and bars. The alcohol tax hike added another \$102 to Maryland tax revenue that was attributable to bicentennial events.

Hotel Tax

Survey data suggests 2.3% of visitors spent the night at a hotel, motel or B&B in Prince George's County or nearby. Survey research measured the average nights stayed and average cost of accommodations. Battle of Bladensburg guests generated a direct impact of \$6,000 for the local hotel industry. The County received \$65 in hotel tax revenues (in addition to Maryland state sales tax revenues).

State Gasoline Excise Tax

Nonresident guests spent an estimated \$5,473 in gasoline while traveling to and from and throughout Prince George's County. A gasoline excise tax of \$.235 per gallon generated \$367 for the State of Maryland.

Public Safety, Fees and Permits

While the Battle of Bladensburg attracted a few thousand people to Prince George's County and spent thousands of dollars during their stay, the event cost the host city and county money for policing, public works, and permitting. The event supported Bladensburg EMS and fire services by providing \$2,300 in

revenue. Furthermore, the Battle of Bladensburg paid \$325 in fees and permits to Prince George's County and \$100 to the State of Maryland.

Revenue Generated by Event Organizers

Lastly, the operating expenditures by event organizers were considered. Maryland Milestones/ATHA Inc. disclosed that an estimated \$22,000 of their operating budget was spent on businesses and organizations operating in Prince George's County and over \$11,620 elsewhere in the State of Maryland. Operating expenditures included the purchase of goods and professional services from local businesses for marketing and PR, signage, printing, food, and entertainment, to name a few. The Battle of Bladensburg was supplemented by a \$64,112 grant from Maryland 1812 Commission. Additional funds were raised by Maryland Milestones/ATHA Inc. through event sponsorship and donations.

IV. The Value of Volunteers

Battle of Bladensburg attracted 25 volunteers providing 300 hours of service. Estimating their monetary worth of volunteers is less critical than the notion that those who volunteered their time could have spent it in many ways, but decided that the bicentennial events were of most importance to them in allocating their time. If the total volunteer hours are calculated at the *government dollar value of a volunteer hour* in Maryland (2013), an estimated \$7,629 is donated in time to the Chesapeake Campaign and Prince George's County.