

2010 Maryland State Parks Economic Impact & Visitor Study



**2010 MARYLAND STATE PARKS ECONOMIC IMPACT
AND VISITOR STUDY**

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Maryland Association of Destination Marketing Organizations
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Executive Summary

Each year, a network of 66 Maryland State Parks welcomes nearly 10 million day visitors and 1 million visitors who stay overnight in campgrounds and cabins. The purposes of this study are to illustrate the estimated economic impact state park visitors have on local communities, increase knowledge of state park visitor interests and to measure visitor satisfaction with their state park experience. This study is based on 1,701 surveys from day use visitors and 1,730 surveys from campers in 36 Maryland State Parks between May and October 2010. Report highlights, include:

- Maryland State Park visitors directly spend more than \$567 million during their trips to State Parks, producing a total economic impact of more than \$650 million annually.
- State park visitor spending supported more than 10,000 full-time jobs and generated more than \$39 million in state and local retail, gasoline, hotel, and income taxes.
- 70 percent of spending and employment impacts are concentrated within 20 minutes of State Parks in local, "gateway communities," often in rural settings.
- 49 percent of overnight visitors and 29 percent of day visitors are from out-of-state.
- 95 percent of day visitors and 94 percent of overnight visitors had expectations met or exceeded during their trip to a Maryland State Park.
- 48 percent of day visitors and 63 percent of overnight visitors come to the State Parks with children. One in 10 groups came with five or more kids.
- Visitors ranked hiking/walking as the most popular activity in State Parks during the time of the survey followed by: general relaxation, swimming, sightseeing, and picnicking/cooking out.
- More than 90 percent of survey respondents agree or strongly agree that Maryland State Parks offer a safe and affordable way to escape from stress, connect with nature, and offer a positive experience for their children.

Introduction

A network of 66 Maryland State Parks welcomes more than 10 million visitors each year to hike, bike, camp, enjoy access to water and spend time with family and friends in scenic natural settings. In addition to the quality of life aspects associated with park lands and afforded to residents of Maryland, State Parks also motivate out-of-towners to travel to an area for the experience and to leave a beneficial economic impact on local communities. The purposes of this study are to:

1. Document the economic impact state park visitors have on local communities and the state.
2. Measure customer satisfaction.
3. Increase knowledge of state park visitor interests and attitudes.

In 2010, the Maryland Department of Business and Economic Development (DBED) and the Maryland Department of Natural Resources (DNR) conducted the first comprehensive study of visitors to Maryland State Parks in an effort to better understand the economic benefits of state park visitors in order to help demonstrate the return on state investment in these protected natural resources. This survey research includes data from 1,701 day visitors and 1,730 overnight visitors who visited Maryland State Parks between May 2010 and October 2010. This study offers a statewide perspective, followed by regional reports.

To plan and develop the 2010 Maryland State Park Visitor Study, project managers reviewed similar studies in North Carolina, Louisiana, Texas, and Pennsylvania, as well as, a National Park Service study questionnaire. No two studies measured the exact same element of the same visitor population – different definitions were constructed for “visitors” based on the nature of the study and the needs of the sponsoring agency. The Maryland State Park 8-page survey covered questions on past and present state park trips, ratings of the current state park experience and value statements, spending on the current trip to the state park, as well as, demographics of the respondents. The entire population of state park visitors at survey parks was targeted in this study to determine the impact of these visitor activities on the local economy.

Methodology

The methodology for the study consisted of four phases: survey and study design, implementation, data analysis, economic impact and returns on investment and objectives.

Survey and study design

The survey questionnaire was designed with input from all partners and included questions regarding visit details, group type, activities, experience, spending, and demographics. Surveying was determined based on a three-year average visitation with the goal of collecting surveys representative of the state park system's regional diversity and visitation.

Park list and total responses per park

The following list includes the State Parks surveyed and the responses from each park. Not all overnight visitor respondents answered what park they visited on the survey. State Parks represented a regional distribution of visitors and were chosen based on visitation numbers, county location, and activity type. This study was designed to provide regional level analysis. Reports are not available per park because the sample sizes at individual parks are not large enough to represent the entire population.

<u>Park</u>	<u>Day use</u>	<u>Overnight</u>	<u>Park</u>	<u>Day use</u>	<u>Overnight</u>
Assateague Island	233	268	North Point	21	Day only
Calvert Cliffs	33	3	Patapsco Valley/McKeldin	297	93
Cedarville	11	9	Pocomoke River	19	97
Choptank River Fishing Pier	18	Day only	Point Lookout	20	68
Cunningham Falls	94	161	Rocks	13	Day only
Dan's Mountain	Overnight only	4	Rocky Gap	38	235
Deep Creek Parks	197	94	Rosaryville	7	Day only
Elk Neck	55	178	Sandy Point	53	12
Fair Hill NRMA	78	Day only	Sassafras River	2	Day only
Fort Frederick	16	2	Seneca Creek	127	Day only
Gambrill	Overnight only	23	Smallwood	15	14
Gathland	22	Day only	St Mary's	15	Day only
Greenbrier	24	93	Susquehanna	33	27
Greenwell	44	Day only	Swallow Falls	79	69
Gunpowder Falls	40	Day only	Tuckahoe	22	26
Herrington Manor	7	13	Washington Monument	27	Day only
Janes Island	9	68	Western MD Rail Trail	5	Day only
Martinak	20	24	Wye Island	7	Day only
New Germany	Overnight only	57	Valid cases	1,701	1,638

Implementation

Day user data collection

Invitations to participate in this survey were distributed over six survey days in the six most visited months of the year: one day in May, June, July, August, September, and October 2010. Visitation in these months accounts for 76 percent of total annual visitation. Day visitors were invited to participate during their park visit by either supplying an email address to receive an electronic survey within two weeks or taking a paper survey to fill out after the state park visit. Volunteers were stationed in areas of the state park that would provide convenient access to visitors and recorded invitations by writing either the paper survey ID number or the email address of the invitee.

State park camper data collection

Many state park groups register with an email address – in FY 2009 online registration accounted for more than 40 percent of total registrations for camp sites and group accommodations. Using this system enabled easier access to a wide sample of these visitors by sending email invitations directly by the vendor that manages the online registration process. The reservations system included overnight and day group reservations. Any day group reservation that could be determined from surveys responses was excluded from the survey data to avoid double counting these visitors, as those day visitors were also eligible to be invited by park volunteers. Sixty nine surveys were excluded through this process.

Responses

A total of 3,431 valid day and overnight state park visitor surveys are included in this study. 1,701 valid day visitor surveys were collected with 100 percent of those surveys tracked back to a park. 1,730 valid camper surveys were collected; 95 percent (1,638) of those surveys included a response to which park they visited on the survey.

<u>Region</u>	<u>Day Users</u>				<u>Overnight visitors</u>			
	% visitors FY08-10	% actual visitors CY2010	No. of surveys collected	% surveys collected	% visitors FY08-10	% actual visitors CY2010	No. of surveys collected	% surveys collected
Western	29%	24%	509	30%	46%	40%	751	46%
Central	41%	36%	708	42%	14%	18%	298	18%
Southern	18%	19%	154	9%	6%	9%	106	7%
Eastern	14%	21%	330	19%	35%	32%	483	30%
Valid cases			1,701				1,638	

Data analysis and economic impact

DBED researchers analyzed the survey data and estimated economic impacts. The second phase of analysis utilized the IMPLAN model and software to estimate indirect, induced, and tax impacts.¹ Data was analyzed by a DBED research manager. The IMPLAN software system helps analysts to address the economic consequences of a situation. Used by over 1,000 public and private institutions, IMPLAN is the most widely employed and accepted regional economic analysis software for predicting economic impacts and includes:

- Indirect effects: The impact of local industries buying goods and services from other local industries.
- Induced effects: The response by an economy to an initial change (direct effect) that occurs through re-spending of income received by a component of value added.

Total economic impact is based on 2010 visitation for the total number of visitors to each region. A 5 percent trimmed mean for expenditure categories was used (i.e. the bottom and top 2.5% of answers were not included in analysis).

Return on investment and return on objectives

This study presents potential framing for statements when using this data alongside employment and budget statistics.

Limitations

While the average group size was available in park reservation records for overnight visitors, an average day visitor group size is not available. The median group size was collected. Using the median group sizes for each region provides perspective on the overall economic impact of state park visitors. The regional medians reflect different visitor attributes that align with anecdotal group variations in those regions. The median group size used in this study also is within the range found in other studies (see page 18 for a list of other studies and group sizes.) A future follow-up survey to confirm the number of people per group in day use groups would verify this data point.

Survey-based studies are also limited to the accuracy of respondents' recollections after travel. Average group expenditures reported in this study reflect the range of findings in other states. A list of comparisons is provided in the Economic Impact section of this report.

¹IMPLAN regional economic model for Maryland, MIG, Inc., IMPLAN® Economic Impact Modeling System version 3.0 (2008 data), 502 2nd St. Suite 301. P.O. Box 837, Hudson, WI 54016.

Findings

Economic Impact

Maryland State Park visitors directly spend more than \$567 million dollars during their trips to State Parks producing a total economic impact of more than \$650 million dollars annually, including indirect and induced spending of more than \$83 million. This spending supported more than 10,000 full-time jobs and \$39 million dollars in state income and retail taxes, *not including the impacts created by state park employees and amusement taxes.*

- 70 percent of economic impact is generated within a 20 minute driving area of a state park.
- 88 percent of the local impact is attributed to day visitors.

	Within a 20 minute drive of park	Elsewhere in Maryland	Total
Direct spending in Maryland communities by state park visitors	\$397,218,237	\$170,224,120	\$567,442,357
Indirect & Induced Economic Impact	\$53,471,434	\$29,751,283	\$83,222,716
Total	\$450,689,670	\$199,975,403	\$650,665,073
Day visitors details			
Direct spending	\$350,742,310	\$152,236,129	\$502,978,439
Indirect & Induced impact	\$47,053,482	\$26,522,540	\$73,576,023
Total	\$397,795,792	\$178,758,669	\$576,554,461
Overnight visitors details			
Direct spending	\$46,475,927	\$17,987,991	\$64,463,918
Indirect & Induced impact	\$6,417,951	\$3,228,742	\$9,646,694
Total	\$52,893,879	\$21,216,733	\$74,110,612

Jobs Impact:

Direct spending impact	7,902
Total	10,198

Sales and Income Tax Impact:

Direct spending impact	<u>\$29.8 million in state and local taxes</u> <i>\$27.1 million in state sales, gasoline and income taxes</i> <i>\$2.7 in county hotel occupancy taxes</i>
Total	<u>\$39.1 million in total state and local tax impact</u> <i>\$34.3 million in state sales, gasoline and income taxes</i> <i>\$4.8 million in county hotel occupancy and income taxes</i>

Out-of-park spending

Average per group spending was \$111 for day use (between \$27 in the Central Region and \$247 in the Eastern Region), with an estimated per person spending outside the park between \$14 and \$82 per visit. The average group overnight spending was \$213 (between \$147 in the Central Region and \$326 in the Eastern Region) with an estimated per person spending outside the park between \$38 and \$68 per visit.

Region	Day Visitors	Group size	<u>Average Group Spending</u>			
			Per person spending	Overnight visitors	Group size	Per person spending
Maryland	\$111	3	\$37	\$213	4	\$53
Western	\$237	4	\$59	\$185	3.97	\$47
Central	\$27	2	\$14	\$147	3.83	\$38
Southern	\$83	4	\$21	\$198	3.44	\$58
Eastern	\$247	3	\$82	\$326	4.76	\$68

When benchmarking or comparing these results to other states and studies, it is important to identify the definition of “visitor” in each study. No two reports use exactly the same definition. During the literature review, it was found that the purpose of each study and population studied was slightly different. However, it is worthwhile to compare the studies.

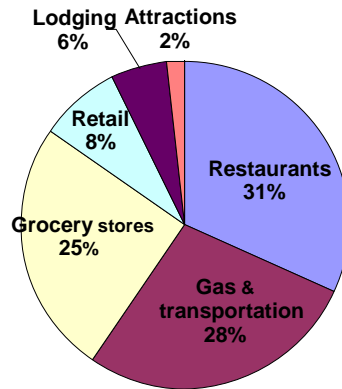
- North Carolina estimated the average spending per primary-purpose, non-local state park visitor was \$127.98 in 2008.
- In Colorado, the total sending per local and non-local groups was \$125.17, equating to \$48 per visitor.
- In Maine in 2006, the average total per party expenditure including park fees was \$124.59; \$87.10 for day use, \$134.36 for historic sites, and \$347.44 for campgrounds.
- In Missouri, the average per person spending for day trips was \$29.67 for residents and \$37.09 for out-of-state visitors.
- In Montana, average resident group expenditures were \$95.40 and non-resident expenditures were \$147.45.
- In Wyoming, visitors spending varied from \$25.75 for a local state park day visitor to \$149.33 for an overnight historic site visitor per day.
- National Park Visitor spending was found to be between \$45 for the local day user and \$240 for a visitor staying in a motel in the park.

Out-of-park spending by category, visitor type and region

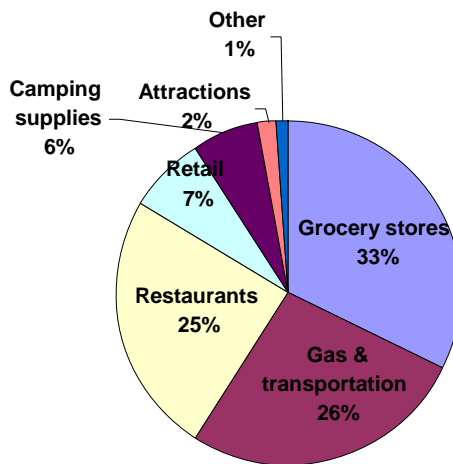
The largest spending category for the average state park trip is on food and drinks in restaurants or grocery stores, except in the case of day users to the Central and Southern Region who spend the most per trip on transportation. Predictably, overnight visitors reported spending on camping supplies. Day visitors in the Western and Eastern Region also left higher spending impacts in the lodging sector. Money spent within State Parks is not included in this study.

Spending Category	Western		Central		Southern		Eastern	
	Day	Over-night	Day	Over-night	Day	Over-night	Day	Over-night
Gas & transportation	\$50.54	\$49.48	\$12.73	\$40.96	\$26.40	\$64.26	\$46.07	\$74.81
Boating supplies bought/rented	\$5.71	\$1.33	\$0.00	\$0.00	\$0.29	\$0.29	\$0.80	\$0.42
Camp supplies bought/rented	\$0.01	\$20.30	\$0.00	\$8.16	\$0.00	\$12.55	\$0.00	\$8.95
Grocery store food & drinks	\$52.32	\$66.05	\$9.26	\$48.26	\$20.02	\$76.71	\$41.89	\$82.98
Restaurant/lounge	\$64.19	\$33.64	\$4.76	\$41.55	\$23.22	\$35.33	\$83.46	\$106.55
Retail	\$16.10	\$10.14	\$0.19	\$6.52	\$9.56	\$7.13	\$25.93	\$36.48
Attractions	\$5.85	\$2.58	\$0.00	\$0.55	\$0.36	\$0.81	\$9.01	\$8.81
Camping/cabin fees outside of park	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.87	\$0.00
Other lodging	\$38.99	\$0.00	\$0.00	\$0.00	\$2.31	\$0.00	\$35.70	\$0.00
Other	\$3.49	\$1.29	\$0.00	\$1.20	\$1.21	\$0.64	\$2.09	\$6.89
Total	\$237.20	\$184.81	\$26.94	\$147.20	\$83.37	\$197.72	\$246.82	\$325.89

Average per trip spending, day visitors (Spending per trip = \$111)



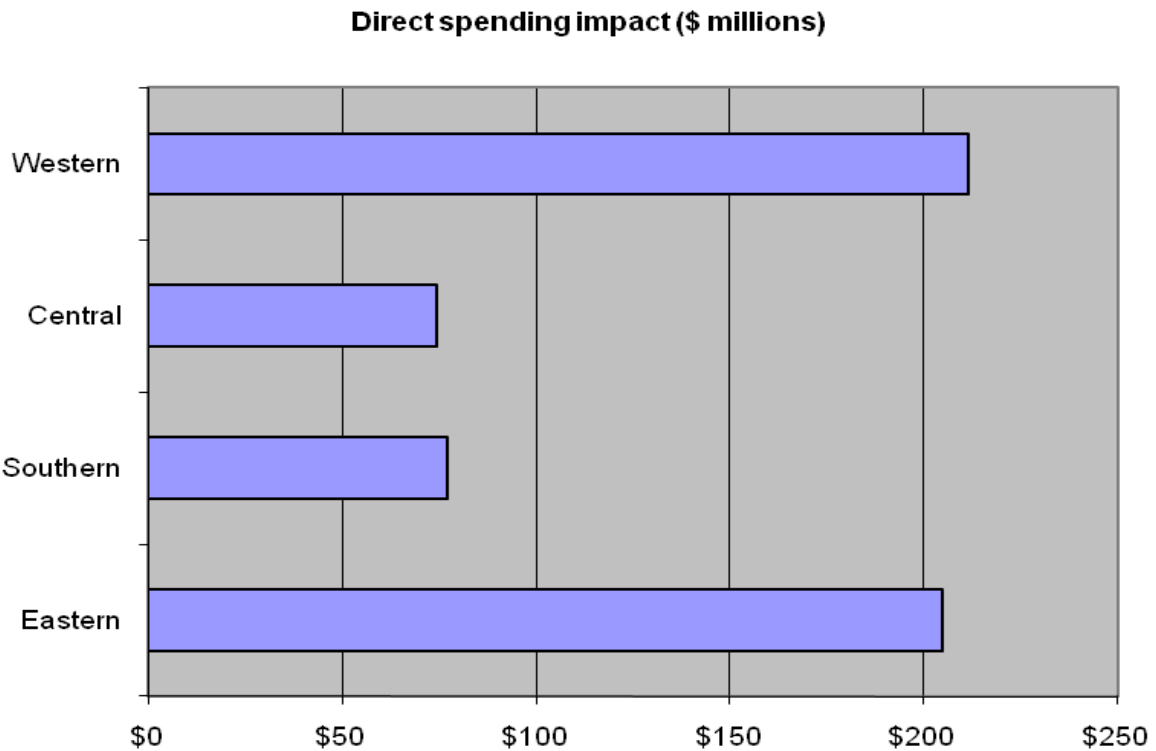
Average per trip spending, overnight visitors (Spending per trip = \$213)



Total trip spending profile by region

Visitors to Maryland State Parks in each region spend more than \$567 million dollars in Maryland during their trips to State Parks.

<u>Region visited</u>	<u>Direct Spending</u>		<u>Total Economic Impact</u> including indirect/induced effects	
	in MD	within a 20 minute drive	in MD	within a 20 minute drive
Western	\$211,407,422	\$152,722,509	\$239,273,592	\$169,903,045
Central	\$74,297,143	\$53,910,981	\$86,879,793	\$64,157,303
Southern	\$76,994,613	\$50,530,556	\$88,065,924	\$56,798,719
Eastern	\$204,743,180	\$140,054,190	\$236,445,765	\$159,830,604

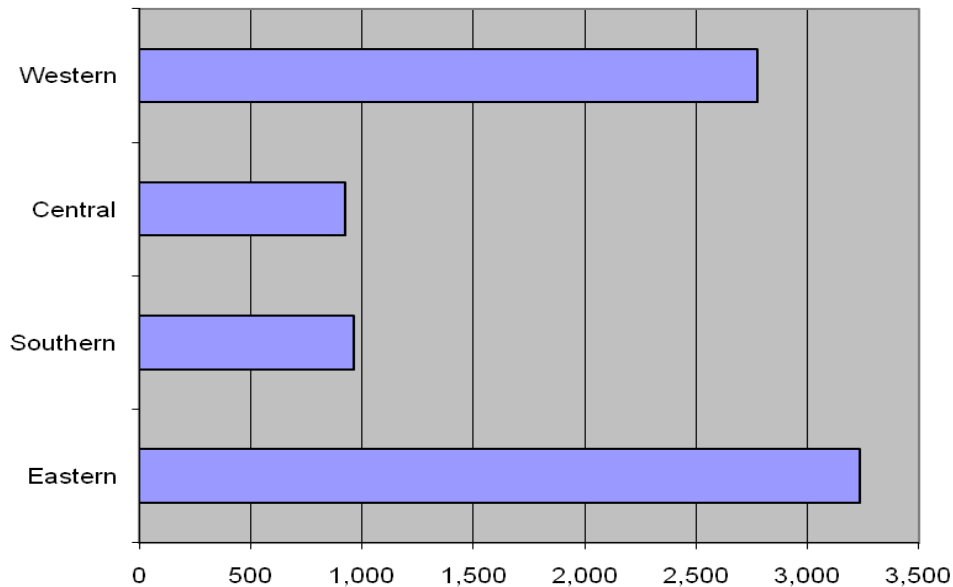


Employment Impact

State park visitor direct spending supports nearly 8,000 full-time equivalent employees in Maryland, with total economic impact supporting more than 10,000 jobs.

<u>Region visited</u>	<u>Jobs supported</u> by direct visitor spending		<u>Total jobs supported</u> including indirect/induced impacts	
	MD jobs	Jobs within a 20 minute drive	MD jobs	Jobs within a 20 minute drive
Western	2,775	2,022	3,539	2,527
Central	925	703	1,230	944
Southern	965	642	1,246	805
Eastern	3,237	2,398	4,183	3,056

Number of direct jobs supported in Maryland



Leveraged Investment

The State of Maryland made a \$22.2 million investment in State Parks in FY 2010. Additionally, state park visitors contribute \$11 million annually by paying for state park services, which support state park operations and were not included in the spending impact estimates in this report.

Based on park visitation surveys, visitors spent more than \$567 million in local communities on food, lodging, and other supplies on their trip to State Parks. This spending generated an economic impact of more than \$650 million. This spending directly generates \$29.8 million dollars in state taxes, nearly covering the investment in State Parks. Including indirect and induced effects as these dollars travel through the economy, this spending creates a total impact of \$34.3 million in state revenues from retail sales, gasoline, and income tax. For every dollar the State invested in parks, visitor spending outside of the park generates \$1.04 returned in state taxes, not including the taxes generated by money spent in the parks.

Additionally, visitor spending generates \$4.8 million dollars in county taxes.

From an overall economic perspective, a leverage ratio describes how the state's net investment of \$22.2 million relates to the total direct, indirect and induced impact of visitor spending of \$650 million. For every \$1 the state invests in state park finding, \$29.27 is generated in economic activity.

Return on Objectives

The mission of the Maryland Park Service is to conserve and protect some of the State's most important natural, cultural and outdoor recreational resources for the enjoyment and appreciation of Maryland citizens, visitors and future generations. The Service monitors performance measures for the following key goals and objectives:

- Providing Marylanders and tourism visitors with increased opportunities to experience nature in scenic, undeveloped settings and develop a stewardship ethic.
- Providing youth with increased access to nature through conservation job corps programs and interpretive programs designed for families.
- Providing diverse outdoor recreation opportunities, including camping, fishing, swimming, hiking and biking for approximately 11 million visitors annually at 66 State Parks.
- Employing practices that restore natural and cultural resources and demonstrate current sustainability best practices for energy and water efficiency and stormwater management.

In 2010, Maryland Park Service employees and volunteers participated in an internal survey to define the Brand Promise of state parks to its visitors. Survey respondents were asked to define their views and attitudes regarding the most important elements that comprise the ideal state park and services, as well as, the emotional rewards visitors should derive from their visit. The results of the survey produced the following key messages that define the Brand Promise of Maryland state parks to visitors:

1. Bring your children to a place that nourishes their well-being in ways that only nature can provide.
2. Connect, through the beauty and serenity of nature, in a safe and welcoming place that belongs to you.
3. Discover important historical sites and relics that tell inspiring stories of people and events that give context and meaning to our lives today.
4. Relax in the reassuring presence of a friendly and dedicated Park Ranger who inspires and supports your desire to be a good steward of the Earth.
5. Leave feeling stress-free, even revitalized, and with happy memories to sustain you.

Visit details

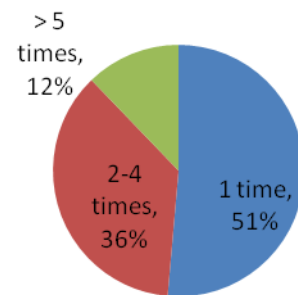
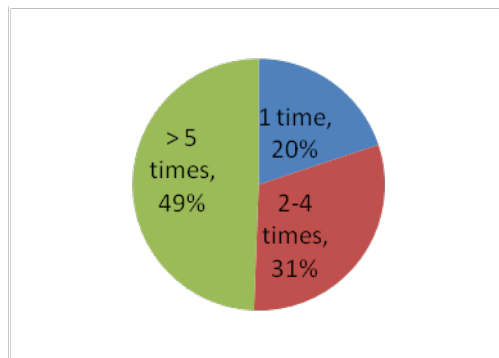
Visiting a state park is the main reason for the trip itself for 6 out of 10 day visitors and 8 out of 10 overnight visitors. For overnight visitors, camping in a state park is the destination of their trip.

<u>Purpose of trip</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Park visit was main reason for trip	62.6%	80.3%
Park visit was not main reason for trip	37.4%	19.7%
Valid cases	1,684	1,723

Overnight visitors are more than two and a half times as likely to be on their first trip to a Maryland State Park within the last twelve months; day visitors are more likely to be repeat customers. Nearly half of day user groups have visited Maryland State Parks more than five times in the last twelve months. Additionally, day visitors do not tend to also camp at Maryland State Parks. Seventy nine percent of day visitors report staying no nights in a Maryland State Park in the last twelve months. *This question was asked toward the end of the survey, which possibly factored into the lower response rate.*

Number of times visited ANY Maryland State Park within in the past 12 months.

	<u>Day visitors</u>	<u>Overnight visitors</u>
1 time – this trip	19.9%	51.4%
2-4 times	30.7%	36.4%
More than 5 times	49.4%	12.2%
Valid cases	1,501	1,509



Number of times stayed overnight at ANY Maryland State Park within the last 12 months.

	<u>Day visitors</u>	<u>Overnight visitors</u>
0 nights	78.5%	-
1 time – this trip	3.5%	10.7%
2-4 times	11.9%	53.2%
More than 5 times	6.0%	36.2%
Valid cases	1,192	692

Overnight trip details

More than one-third (35%) of day visitors are on an overnight trip away from home.

Day visitors who returned home that day: 65%

Day visitors who stayed overnight away from home: 35%

home:

Day visitors on overnight trips and overnight visitors were asked about the entire trip duration, nights were spent within 20 minutes of the state park, and lodging type. Many overnight visitors reported “other state campgrounds” in comments, which was not a response option. Day visitors who are on an overnight trip are most likely to be on an extended trip lasting 5 or more days (34 percent), and are also likely to stay near the park for the trip duration. State park overnight visitors are more likely to be on a shorter trip – with 43 percent on a trip lasting 2 nights.

	<u>Nights in this state park</u>	<u>Duration of overnight trip away from home</u>		<u>Nights spent within 20 minutes of state park</u>	
	<u>Overnight only</u>	<u>Day</u>	<u>Overnight</u>	<u>Day</u>	<u>Overnight (>1 overnight)</u>
0 nights	-	-	-	18.4%	67.5%
1 night	12.4%	12.2%	9.7%	9.7%	4.1%
2 nights	45.1%	22.4%	43.1%	17.5%	14.9%
3 nights	15.9%	20.7%	16.2%	15.9%	4.8%
4 nights	8.3%	11%	9%	8.8%	2.2%
5 or more nights	18.3%	33.7%	22%	29.6%	6.5%
Valid cases	1,679	581	1,656	580	1,611

Park Awareness

More than one-third (36%) of overnight visitors find out about State Parks online, while 44 percent of day users and 34 percent of overnight visitors know about the park already because of a previous visit or previous knowledge. Another 32 percent of day users and 25 percent of overnight visitors visit the park because of a personal recommendation.

Both day use and overnight visit populations consist of a base of repeat customers. More than one-third for both visitor types had previously visited the park. Still, the majority of customers report that they are newly discovering the particular park on this current trip.

<u>Park Awareness</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Previous visit	34.3%	31.2%
Friends, family, co-workers	32.2%	23%
Previous knowledge/lived/have home in area	9.7%	2.8%
State park website/Internet search	9.4%	36.6%
Other	4.5%	2%
Map	3.3%	2.1%
Saw sign/drive by	3%	0.5%
Tourism office/visitors bureau	1%	0.2%
Travel guides and books	0.8%	0.8%
State park brochure	0.7%	0.5%
Newspaper/ magazine	0.7%	0.2%
Television	0.1%	0.1%
Welcome kit	0.1%	0%
Automobile/ travel club	0.1%	0%
<i>*Top other responses (% of total)</i>	Park Quest (<1%) Triathlon (<1%)	Reserveamerica.com (0.3%) Park Quest (0.2%) Boy Scouts (0.2%)
Valid cases:	1,681	1,730

Trip Composition

The majority of state park trips are taken with family – 53 percent for day visitors and 79 percent for overnight visitors. Nearly half of day visitors and 63% of overnight visitors come with children, while 10 percent of day visitors and 11 percent of overnight visitors visit with 5 or more kids.



The average group size for overnight visitors was determined based on actual online reservations for overnight groups during the survey months. The median size per group for day visitors found in this study correlates with the average group size in other similar studies, with regional median group sizes used to estimate the economic impact of day visitors. The Western and Eastern Region median group size is 4; the Central Region median group size is 2; the Southern Region median group size is 3. These medians reflect known anecdotal group differences in those regions. The statewide median group size found in this study reflects the average group sizes in other studies:

- North Carolina found the average state park visitor group (defined as primary-purpose, non-local in that study) had 3.14 people including campers in 2008.
- In 2010, Wyoming found the average group to State Parks was 2.85 and 2.81 to historic sites.
- A 2001 Missouri visitor count study found the average group size to State Parks, including overnight, day use, and historic sites to be 2.1 persons.
- In 2005, Maine State Park group average was 4.3 for day-use groups, 3.9 for campground use, and 3.5 for historic site groups.
- Montana size of vehicle groups was 3.4 in 2010.
- The largest average group size was reported in Louisiana at 6.04 people, including a note that this number is high due to several large groups of people included in the survey.

<u>Members of the party</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Myself	16.2 %	2.4%
Family	52.9%	79%
Friends	14.2%	13.5%
Family & Friends	11.3%	0.8%
Work Group	1%	0.7%
Other organized group	4.1%	3.4%
All of the above	0.3%	0.1%
Valid cases	1,664	1,689

<u>Total number of people in group</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
1	15.2%	2%
2	28.4%	25.6%
3	10.7%	11.5%
4	12.8%	21.9%
5 or more	33%	39%
Valid cases	1,661	1,689
Average for total population	-	3.81
Median	3	-
<u>Number of children in group</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
0	52.1%	36.5%
1	11.5%	14.2%
2	14.3%	23.7%
3	8.3%	9.6%
4	3.7%	5%
5 or more	10.1%	11%
Valid cases	1,664	1,688

An automobile is the most popular way to get to State Parks. Bicycling ranks the second most popular for day visitors, while 10 percent of overnight visitors come in recreational vehicles.

<u>Mode of transportation</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Automobile	90%	87.5%
Bicycling/Foot traffic	5.1%	0.4%
Other	1.9%	1.6%
Recreational vehicle	1.3%	10%
Boat	0.6%	0.1%
Bus	0.4%	0.4%
Motorcycle	0.5%	0.2%
Valid cases	1,660	1,688

Park Activities

A higher percentage of overnight visitors are generally more engaged in all activities, except for niches including special events/festivals, mountain biking, waterskiing, horseback riding, and sailing. In comparison to Maryland tourism: the top activities for all visitors are dining, shopping, entertainment, sightseeing, and going to the beach/waterfront.

<u>Activity</u>	<u>% of day visitors</u>	<u>Activity</u>	<u>% of overnight visitors</u>
Hiking/walking	56.4	Hiking/walking	75.7
General relaxation	37.2	General relaxation	67.1
Swimming	36.5	Swimming	63.2
Sightseeing	28.3	Picnic/cookout	58.8
Picnic/cookout	27.7	Sightseeing	43.1
Photography	24	Photography	39
Sunbathing	20.7	Sunbathing	28.8
Playground	16.5	Birding/wildlife viewing	26.6
Birding/wildlife viewing	15.4	Playground	25.9
Pleasure driving	14.6	Pleasure driving	24.9
Bicycling on pavement	12	Bicycling on pavement	24.7
Other	11.7	Fishing (pier/bank)	24.7
National Park visit	11.6	Canoeing/kayaking	22.8
Boating (pleasure)	10.7	Shopping	18.3
Dog walking	10.2	National Park visit	16.2
Canoeing/kayaking	10	Interpretive programs/exhibits	14.5
Fishing (pier/bank)	9.8	Dog walking	13.8
Nature study	8.9	History/cultural interest	13.2
Shopping	8.5	Nature study	12
History/cultural interest	8.2	Boating (pleasure)	10.3
Mountain biking	8	Other	10.1
Fishing (boat)	6.1	Fishing (boat)	7.8
Interpretive programs/exhibits	5.9	Mountain biking	4.8
Special event/festival	5.5	Special event/festival	4.7
Horseback riding	3.5	Climbing	3.3
Waterskiing	2.8	Waterskiing	1.3
Climbing	2	Horseback riding	0.8
Sailing (sailboat)	1	Sailing (sailboat)	0.4
Sailing (windsurfing)	0.2	Sailing (windsurfing)	0.1
Hunting (out of season during survey)	0.1	Hunting (out of season during survey)	0.1
Valid cases:	1,669		1,686

Other activities listed:

Other activities listed:

Running (2.1%); Disc golf (1.5%); Crabbing (0.6%)

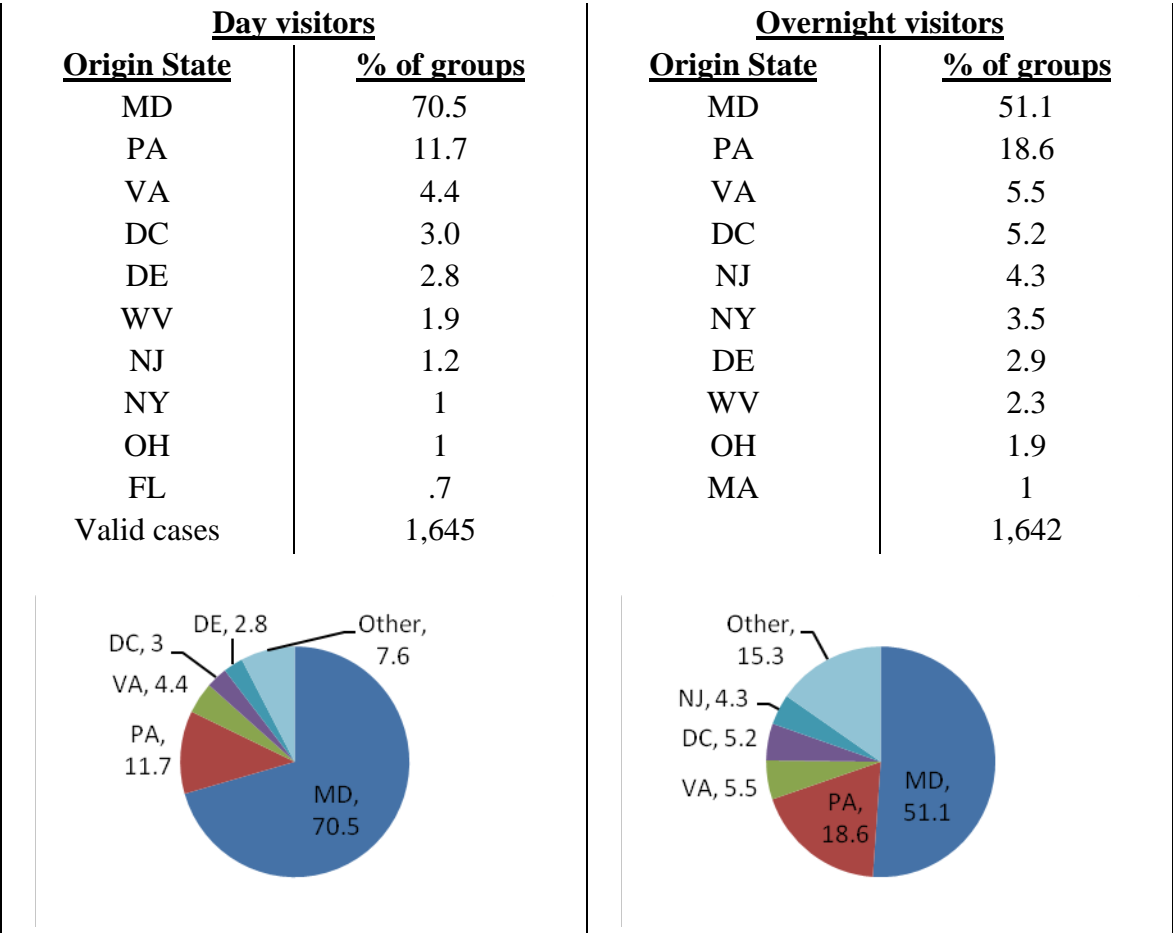
Crabbing (0.8%); Geocaching (0.3%); Golfing (0.3%)

Survey respondent demographics

The majority of Maryland State Park visitors are Marylanders themselves – 71 percent of day visitors and 51 percent of overnight visitors. 92 percent of state park day visitors originate in the top five states of Maryland, Pennsylvania, Virginia, Washington, D.C., and Delaware. 85 percent of camping groups originate from the top five states – New Jersey ranks as the fifth state of origin. These figures include only U.S. visitors who responded.

In comparison to Maryland tourism: 75 percent of tourist groups originate in the top five states of Maryland (33.6%), Virginia (18.5%), Pennsylvania (14.8%), New York (4%), and Delaware (3.9%). The overnight figures correspond with a 2004 study of public and private campground patrons that found 58 percent of overnight visitors are from Maryland, 16 percent from Pennsylvania, 6 percent from Virginia, and 4 percent from New Jersey.

Top 10 States of Origin



Seventy seven percent of day visitor and 74 percent of camper respondents reported being Caucasian, followed by 2.2 percent African-American for day visitors and 3 percent Asian for overnight visitors, not including respondents who listed multiple races under “Other”. Eighty six percent of day visitors and 82 percent of overnight visitors prefer to communicate in the English language. Nearly one-third of both day visitors and overnight visitors report an annual household income of more than \$100,000.

	Day visitor respondents	Overnight visitor respondents
<u>Race/ethnicity</u>		
African American/Black	2.2%	2%
Spanish/Hispanic/Latino	1.9%	1.2%
Caucasian/White	77.2%	74.4%
Asian/Asian American	1.8%	3%
Pacific Islander	0%	0.1%
Native American/American Indian	0.5%	0.2%
Other/Multiple races	2.3%	2%
No data	14.2%	17.2%
<u>Preferred language</u>		
English	85.5%	82.3%
Spanish	0.8%	0.6%
French	0%	0.5%
Russian	0.1%	0.1%
Chinese	0.4%	0.7%
Other	0.1%	0.8%
No data	13.2%	15%
<u>Income level</u>		
Less than \$30,000	6.8%	4.5%
\$30,000-49,999	11.9%	8.9%
\$50,000-74,999	16.3%	16.6%
\$75,000-99,999	13%	17.6%
\$100,000 +	32.0%	29.8%
missing	19.9%	22.6%

Positive Visitor Experiences Extend Stays

Day visitors are more likely to stay longer at the park because of their experiences. Thirty nine percent of day visitors stay longer, with 92 percent of those who did stay longer staying less than one day longer. Less than 5 percent of overnight visitors stayed longer than originally expected. Results should be used with caution because of a low sample size for the follow-up question.

Did you stay at the park longer than planned because of your park experience?	Day visitors	Overnight visitors
No	61.4%	95.4 %
Yes	38.6%	4.6%
Valid cases	1,641	1,685

If yes, how much longer?

Less than one hour longer	15.7%	14.5%
Between 1-2 hours longer	53.7%	17.1%
More than 2 hours longer	22.7%	31.6%
1 full day longer	5.4%	25%
2-4 days longer	2.1%	10.5%
5 or more days longer	0.5%	1.3%
Valid cases	630	76

95 percent of days visitors and 94 percent of overnight visitors had expectations met or exceeded during their trip to a Maryland State Park in 2010.

Ninety five percent of day visitors and 84 percent of overnight visitors look forward to a return trip to a Maryland State Park.

<u>Did your visit...?:</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Meet your expectations	67.9%	61.6%
Exceed your expectations	27.4%	32.1%
Did not meet my expectations	1.3%	4.6%
I did not have expectations	3.4%	1.7%
Valid cases	1,514	1,507

<u>Will you likely come back?</u>	<u>Day visitors</u>	<u>Overnight visitors</u>
Yes	94.6%	84.2%
Don't know	3.2%	8.1%
No, because I do not live in the area	1.2%	2.1%
No, for another reason	1%	5.6%
Valid cases	1,511	1,504

State park visitors rate their experience as positive. For all state park visitors, the statement that rates highest is: “Visiting a state park is something I want to do again”.

Visiting this state park is:	Mean	Strongly Agree (5)	Agree (4)	Neutral (3)	Disagree (2)	Strongly Disagree (1)
DAY VISITOR RATINGS*						
Something I want to do again.	4.71	74.0%	23.5%	2.3%	0.1%	0.1%
Something I feel safe doing.	4.64	67.7%	28.8%	3.0%	0.4%	0.1%
An important way to escape from stress and demands of daily life.	4.60	64.7%	31.0%	3.7%	0.4%	0.1%
A good value.	4.52	60.3%	32.2%	6.6%	0.6%	0.3%
One of the best ways to connect with nature.	4.48	56.4%	35.8%	7.4%	0.3%	0.2%
Important to my health and feeling good.	4.45	55.7%	34.0%	9.4%	0.7%	0.1%
A positive experience for my children*	4.45	54%	37.4%	8.3%	0%	0.3%
One of the best ways to spend time with family.	4.36	51.0%	35.1%	13.1%	0.5%	0.1%
A fun and effective way to learn about nature.^	4.30	45.2%	40.5%	13.8%	0.3%	0.1%
A meaningful way to experience Maryland culture and history.	4.03	34.0%	38.7%	23.8%	3.0%	0.5%

OVERNIGHT VISITORS RATINGS*

Something I want to do again.	4.66	72.2%	24%	2.5%	0.7%	0.7%
A positive experience for my children.*	4.65	67.9%	28.9%	3.1%	0%	0.1%
Something I feel safe doing.	4.62	66.4%	30.2%	2.8%	0.2%	0.4%
An important way to escape from stress and demands of daily life.	4.57	62.7%	32.4%	4.5%	0.3%	0.1%
One of the best ways to connect with nature.	4.49	56.6%	36.4%	6.5%	0.4%	0.1%
One of the best ways to spend time with family.	4.48	57.1%	34.6%	7.6%	0.5%	0.1%
A good value.	4.47	56%	36.7%	5.7%	1.1%	0.5%
Important to my health and feeling good.	4.3	44.3%	42.1%	12.9%	0.3%	0.3%
A fun and effective way to learn about nature.^	4.23	40.3%	42.8%	16.2%	0.7%	0%
A meaningful way to experience Maryland culture and history.	3.93	27.7%	40.9%	28.9%	2.4%	0.2%

*Results for groups including children; ^Day visitors given: A fun and effective way to learn about nature and making a difference.

Natural scenery is the most highly rated attribute of Maryland State Parks.

Park attributes	Very Good (5)	Good (4)	Average (3)	Poor (2)	Very Poor (1)	N/A	Mean (for applicable only)
DAY USER RATINGS							
Natural scenery	73.5%	22.3%	3.1%	0.1%	0%	1.0%	4.71
Value for fee paid	47.6%	27.4%	10.0%	1.9%	0.5%	12.6%	4.37
Customer service	34.7%	24.5%	7.6%	0.9%	0.4%	31.9%	4.35
Paths/trails	40.6%	35.9%	10.0%	0.6%	0.2%	12.8%	4.33
Recreational opportunities	38.0%	29.9%	9.9%	0.8%	0.2%	21.2%	4.33
Campground	15.5%	10.8%	4.7%	0.7%	0%	68.3%	4.30
Nature Center	21.1%	18.1%	7.0%	0.9%	0.1%	52.9%	4.26
Picnic area	29.4%	31.8%	9.8%	1.1%	0.3%	27.5%	4.23
Visitors Center	25.1%	21.9%	9.3%	1.0%	0.1%	42.6%	4.23
Park map/brochure	27.1%	27.8%	11.3%	2.1%	0.6%	31.2%	4.14
Cabins	5.6%	4.2%	3.5%	0.1%	0.1%	86.5%	4.12
Park programs	15.0%	16.4%	9.1%	1.1%	0.1%	58.3%	4.08
Interpretive signs/exhibits	22.5%	31.2%	15.7%	1.5%	0.6%	28.6%	4.03
Restrooms	26.9%	33.2%	19.5%	4.7%	1.5%	14.2%	3.93
Mean for all ratings							4.23
OVERNIGHT RATINGS							
Natural scenery	70.1%	26.8%	2.5%	0.3%	0%	0.3%	4.67
Campground	54.6%	33.6%	7%	0.9%	0.4%	3.4%	4.46
Customer service	50.5%	33.9%	8.9%	2.1%	0.9%	3.7%	4.36
Value for fee paid	50.5%	36.6%	10.1%	2%	0.6%	0.2%	4.35
Picnic area	30.5%	33.8%	9.8%	0.3%	0.3%	25.2%	4.25
Recreational opportunities	37.9%	37.4%	12.4%	1.4%	0.6%	10.3%	4.23
Cabins	9.2%	6.8%	3.2%	0.5%	0.1%	80.1%	4.23
Paths/trails	35.7%	38.5%	14.3%	1.3%	0.3%	9.9%	4.2
Visitors Center	27%	26.7%	10.4%	1.5%	0.6%	33.8%	4.18
Park map/brochure	39.7%	36.5%	14.5%	3.4%	1.2%	4.7%	4.16
Nature Center	22.9%	21.2%	10.8%	1.3%	0.5%	43.3%	4.14
Restrooms	38.7%	33.8%	18.5%	5.3%	1.7%	2%	4.05
Interpretive signs/exhibits	21.2%	31.3%	16.5%	2.4%	0%	28.7%	4
Park programs	18.3%	24.8%	12.6%	1.7%	0.8%	41.7%	4
Mean for all ratings							4.24