

Section 6: Market Analysis for Heritage Tourism

Location

The Southern Maryland Heritage Area is composed of portions of Calvert, Charles and St. Mary's Counties in Maryland. It is within an hour's drive of Washington, D.C., Baltimore and Annapolis and a two-to three-hour drive from Wilmington, Philadelphia and Richmond. Access to I-95/I-495 (the Capital Beltway) is through interchanges with MD Rt. 210 serving Charles County, MD Rt. 5 serving both Charles and St. Mary's Counties and MD Rt. 4 serving Calvert County. U. S. Route 301, which traverses Charles County, connects the region with Wilmington, Annapolis and Richmond. The area can also be reached by boat from the Chesapeake Bay, the Patuxent River and the Potomac River.

Regional airports in Charles County and St. Mary's County accommodate privately owned planes. The St. Mary's Airport Authority has undertaken a capital expansion program.

A passenger ferry service traverses the Bay from Point Lookout to Smith Island to service tourists. A car ferry service between Southern Maryland and the Eastern Shore continues to be debated.

Economic Context

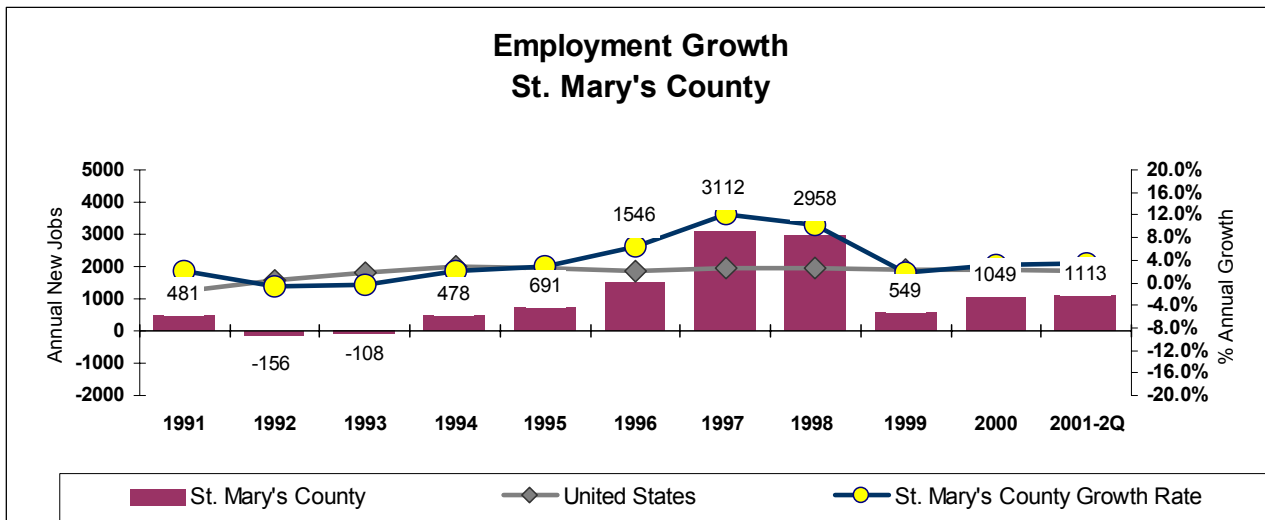
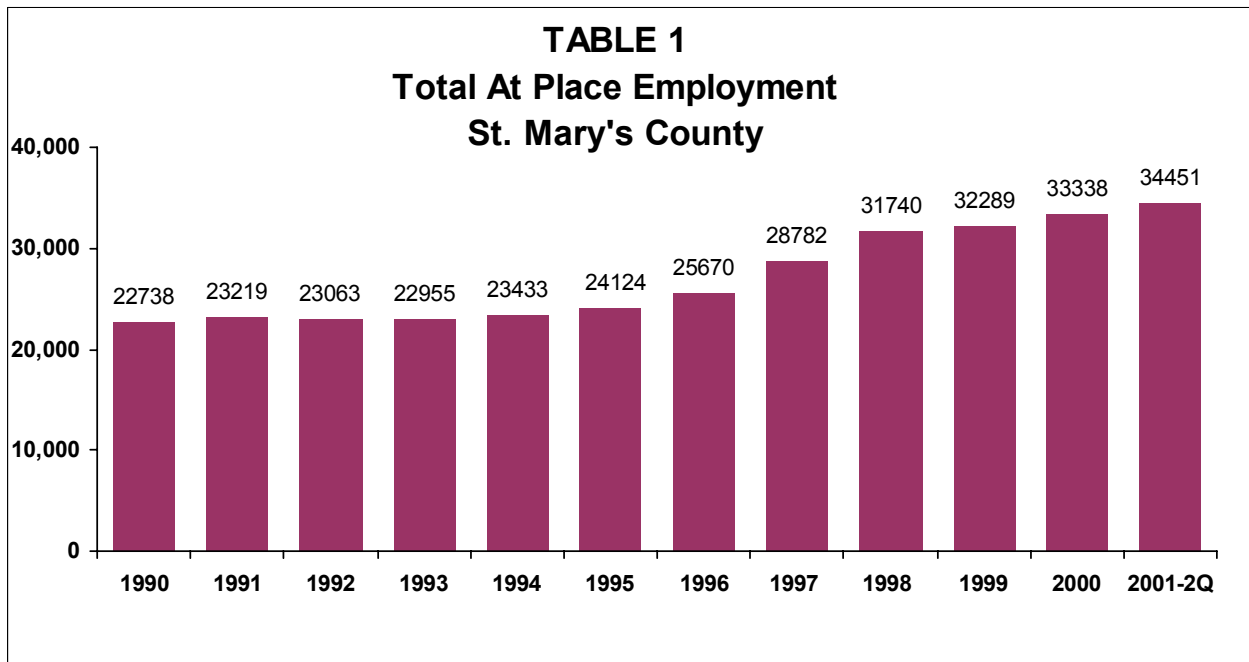
Labor Force and Unemployment

Throughout the last decade, the labor force of the three Southern Maryland counties continued to expand while unemployment rates consistently outperformed state and national levels. By the second quarter of 2001, unemployment rates in all three counties were below 3 percent while the State of Maryland reported a 4.1 percent rate and the United States as a whole exhibited a 4.8 percent rate of unemployment. Calvert County had the lowest unemployment rate of the three counties in 2001—2.3 percent.

Employment By Sector

Unlike the other counties in Southern Maryland, St. Mary's County serves as an employment center for the entire region. From 1996 through the second quarter of 2001, the County's at-place employment grew by 8,691 jobs or by 33.8 percent (Table 1). Almost 70 percent of the County's job growth took place between 1996 and 1998, the time period during which the Patuxent River Naval Air Station (Pax River) expanded significantly. In an effort to consolidate naval aviation research and development activities, the Base Realignment and Closure Commission had recommended in 1995 that over 5,000 military and civilian jobs be relocated to

(*) 2001 data is average of the first 2 quarters.



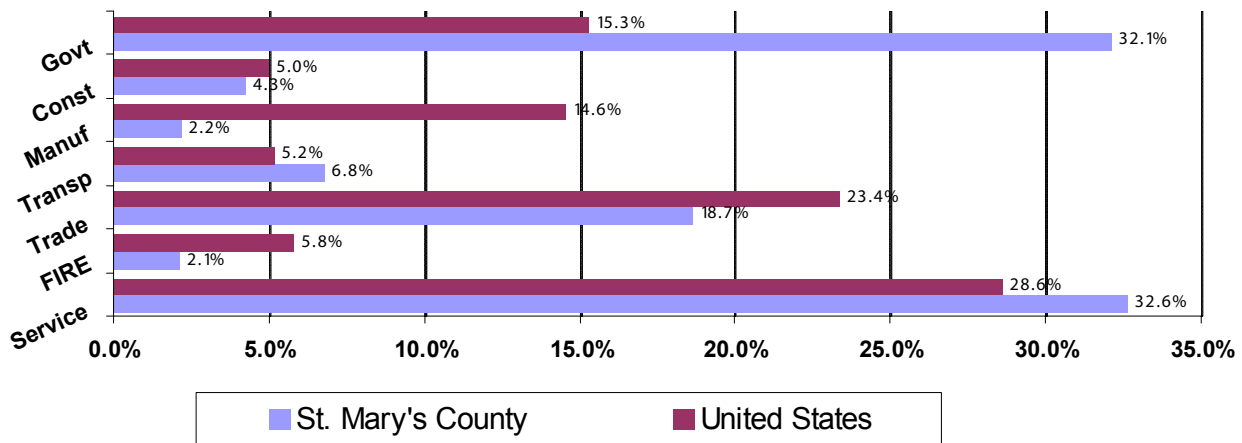
Source: Maryland Department of Labor Licensing and Regulation Bureau of Labor Statistics, Covered Employment and Wages (ES 202)

Pax River from other Navy military facilities in Pennsylvania, New Jersey and Virginia. Many of these jobs were highly skilled and highly paid. Due to the expanding military presence in the area and the nature of research undertaken at the base, St. Mary's County has been experiencing a continuing influx of defense contractors and other high-tech companies. A 1999 study by the Maryland Department of Labor, Licensing and Regulation indicated that 20 percent of St. Mary's

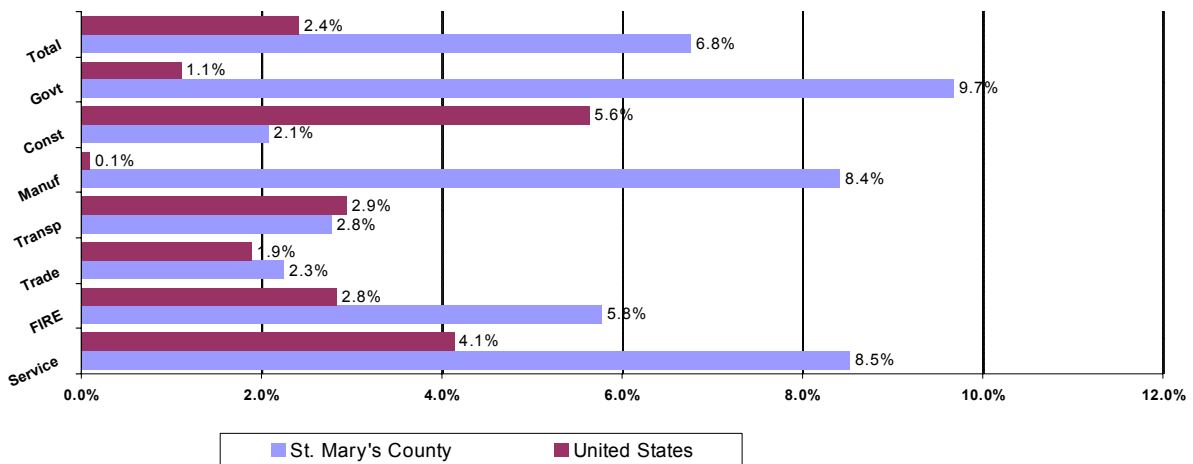
County's employment base was attributable to high-tech firms, the highest proportion of any jurisdiction in the state.

Given the presence of the Naval Air Station in St. Mary's County, government accounted for one-third of its employment base in 2000, compared to 15 percent of the National employment base (Table 2). The service sector, which includes defense contractors and other high-tech companies, comprised another third of St. Mary's County employment. Both sectors have grown at a much higher rate in the County than in the Nation as a whole.

TABLE 2
2000 Employment by Sector
St. Mary's County and United States



Annualized Employment Change by Sector, 1995-2000
St. Mary's County and United States



Of the three Southern Maryland counties, Calvert County has the smallest employment base and functions primarily as a bedroom community for commuters to Baltimore, Washington, Annapolis and nearby Lexington Park (Table 3). Reflective of the County's recent population growth, the largest employment sectors in 2000 were trade in the form of retail services along the RT2/4 corridor (25.9 percent), services (25.8 percent) and government (18.2 percent) (Table 4). Calvert County has taken aggressive action to increase its employment base by increasing business incentives and investing in a new office park in Lusby, Maryland.

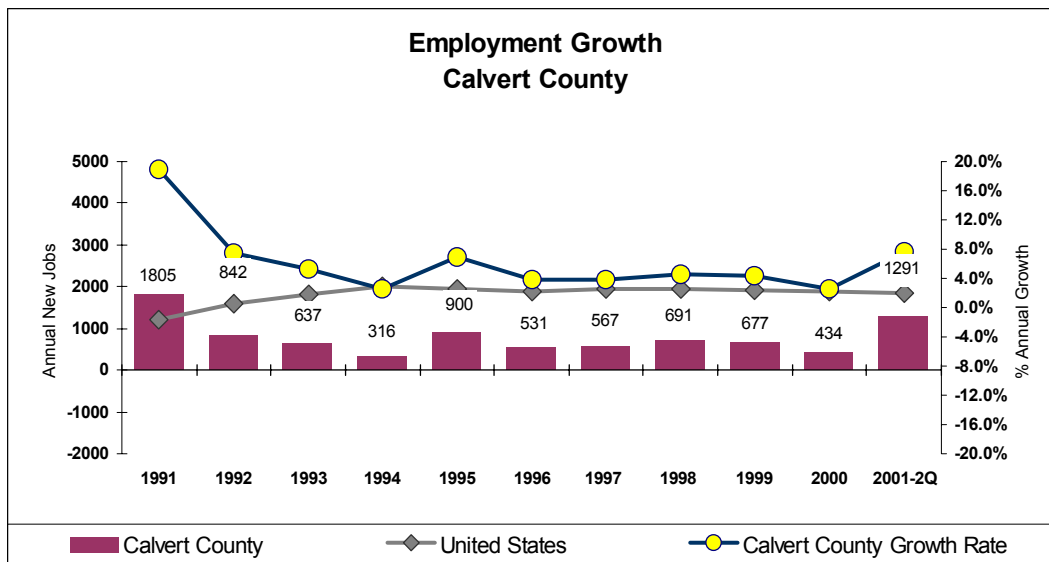
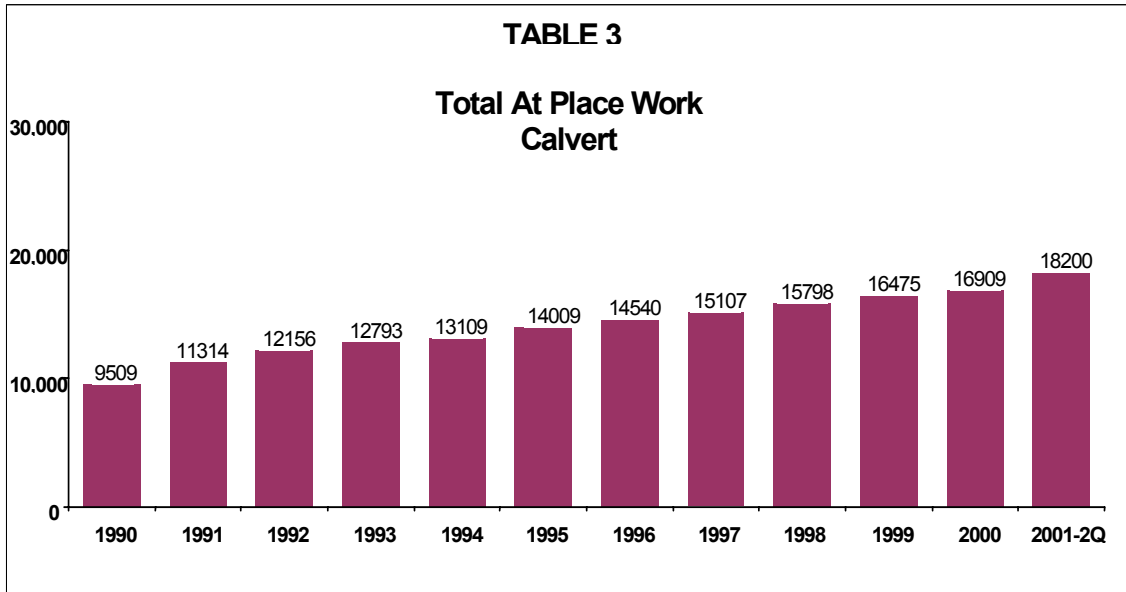
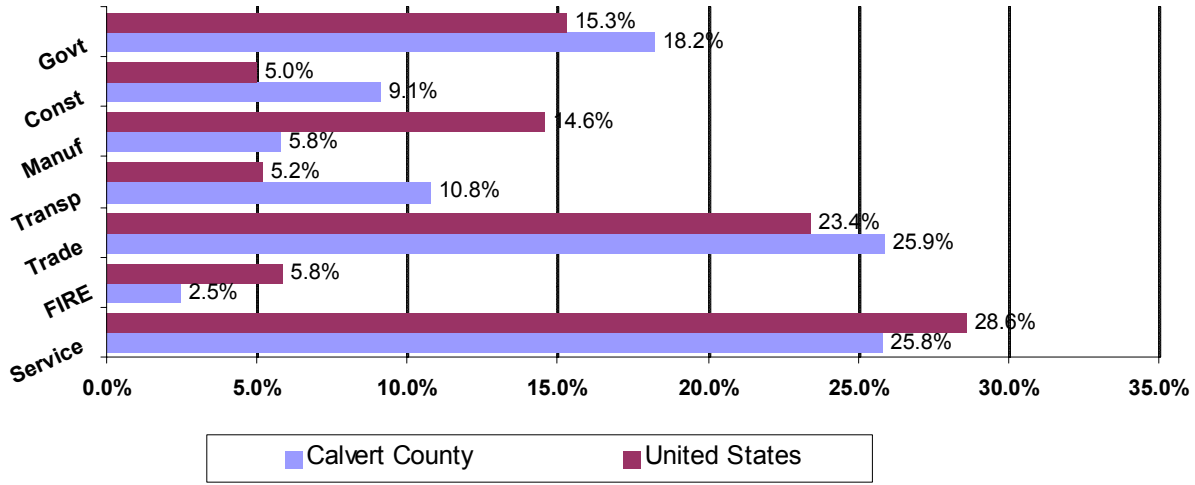
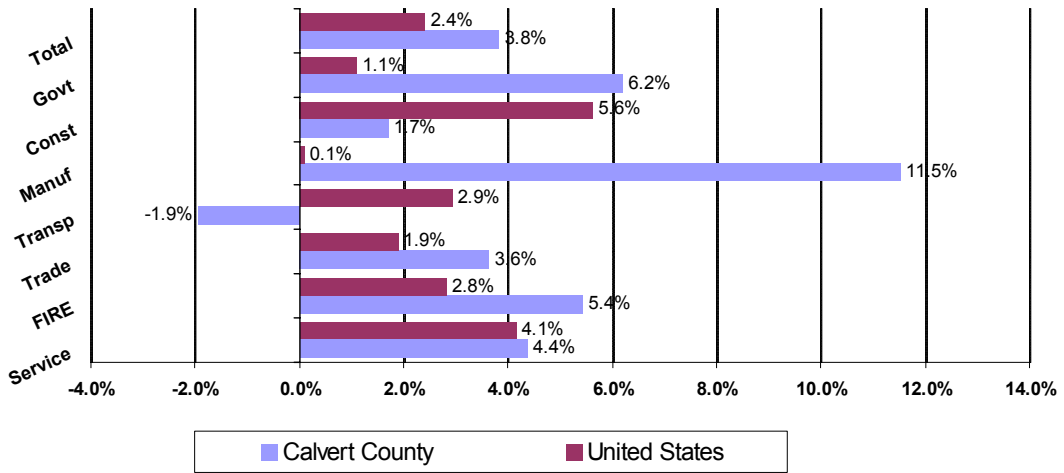


TABLE 4
2000 Employment by Sector
Calvert County and United States



Annualized Employment Change by Sector, 1995-2000
Calvert County and United States



At the end of the 1990's, employment within Charles County remained fairly stable (Table 5). The top three employment sectors in Charles County in 2000 were trade (35.4 percent), government (20.5 percent) and services (19.8 percent); the County exhibited the largest concentration of trade employment of the three counties. The high proportion of government jobs in Charles County was reflective of the expanded presence of the Naval Surface Warfare Center at Indian Head (Table 6).

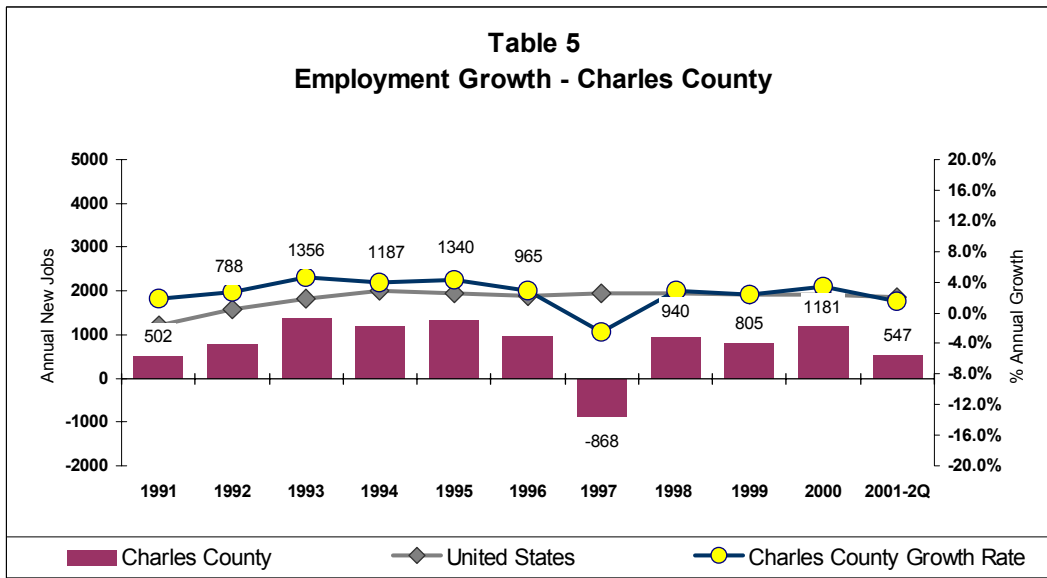
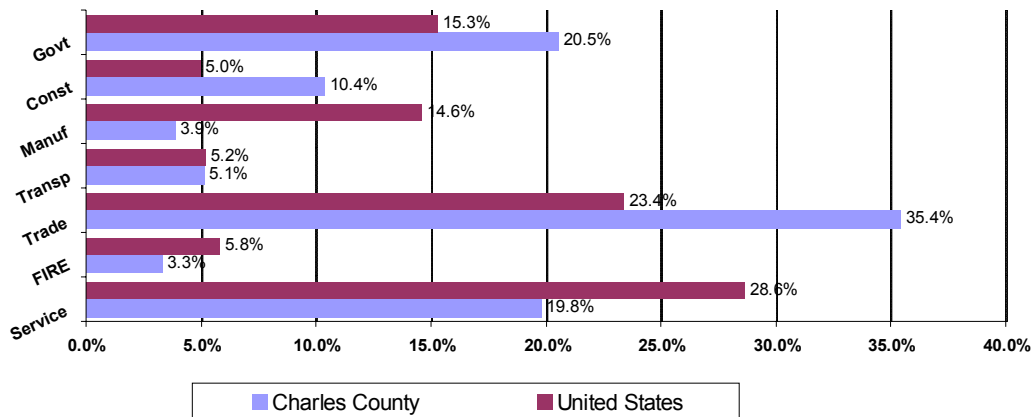
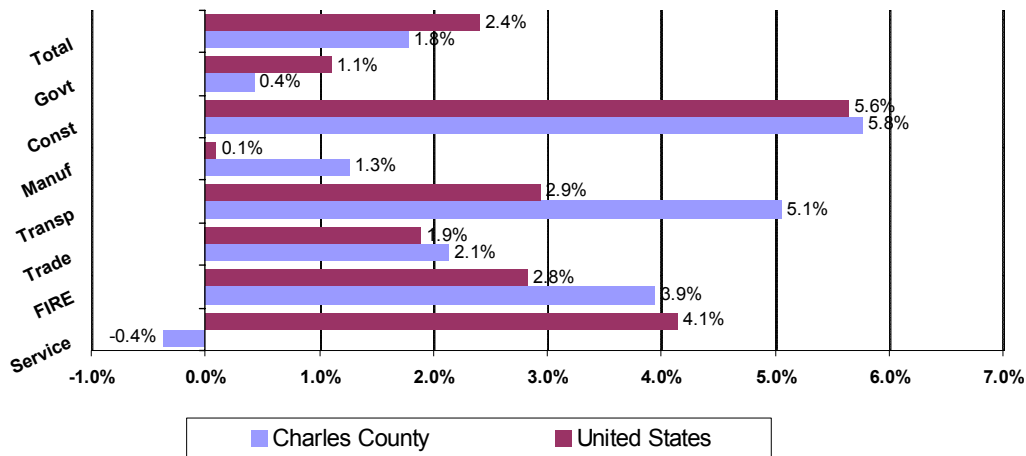


TABLE 6
2000 Employment by Sector
Charles County and United States



Annualized Employment Change by Sector, 1995-2000
Charles County and United States



Growth Trends

Throughout the 1990's, Southern Maryland grew at a faster pace than the State of Maryland as a whole (Table 7). Between 1990 and 2000, the population of Southern Maryland increased by 23.1 percent or 52,820 persons to a total of 281,320 persons, representing 5.3 percent of the State total. During the ten-year period, Southern Maryland households rose by an annual compounded

rate of 2.6 percent to a total of 97,757 households in 2000, also approximately 5 percent of the State total.

Of the three Southern Maryland counties, Calvert County witnessed the fastest rate of growth, experiencing almost a 50 percent gain in both population and households. St. Mary's County's growth rate was the smallest of the three counties and less than one-half the rate of increase of Calvert County (Table 8). In 2000, Charles County with 120,546 persons, or 42.9 percent of the regional total, still remained the largest of the three counties, followed by St. Mary's County with 86,211 persons or 30.6 percent of the total and Calvert County with 74,563 persons or 26.5 percent.

Table 7											
Population and Household Growth 1990 to 2010											
Southern Maryland and Maryland											
				Change 1990 to 2000				Change 2000 to 2010			
Southern Maryland				Total		Annual		Total		Annual	
	1990	2000	2010	#	%	#	%	#	%	#	%
Population	228,500	281,320	334,800	52,820	23.1%	5,282	2.1%	53,480	19.0%	5,348	1.8%
Households	75,436	97,757	121,300	22,321	29.6%	2,232	2.6%	23,543	24.1%	2,354	2.2%
Source: Claritas Inc. and Maryland State Data Center.											
				Change 1990 to 2000				Change 2000 to 2010			
Maryland				Total		Annual		Total		Annual	
	1990	2000	2010	#	%	#	%	#	%	#	%
Population	4,780,753	5,296,486	5,722,800	515,733	10.8%	51,573	1.0%	426,314	8.0%	42,631	0.8%
Households	1,748,991	1,980,859	2,200,371	231,868	13.3%	23,187	1.3%	219,512	11.1%	21,951	1.1%
Source: Claritas Inc. and Maryland State Data Center.											
Note: annual change is compounded rate											

Table 8
Population and Household Growth 1990 to 2010
Calvert, Charles, and St. Mary's Counties

				Change 1990 to 2000				Change 2000 to 2010			
Calvert County				Total		Annual		Total		Annual	
	1990	2000	2010	#	%	#	%	#	%	#	%
Population	51,372	74,563	86,600	23,191	45.1%	2,319	3.8%	12,037	16.1%	1,204	1.5%
Households	16,986	25,447	30,450	8,461	49.8%	846	4.1%	5,003	19.7%	500	1.8%

Source: Claritas Inc. and Maryland State Data Center.

				Change 1990 to 2000				Change 2000 to 2010			
Charles County				Total		Annual		Total		Annual	
	1990	2000	2010	#	%	#	%	#	%	#	%
Population	101,154	120,546	147,400	19,392	19.2%	1,939	1.8%	26,854	22.3%	2,685	2.0%
Households	32,950	41,668	53,300	8,718	26.5%	872	2.4%	11,632	27.9%	1,163	2.5%

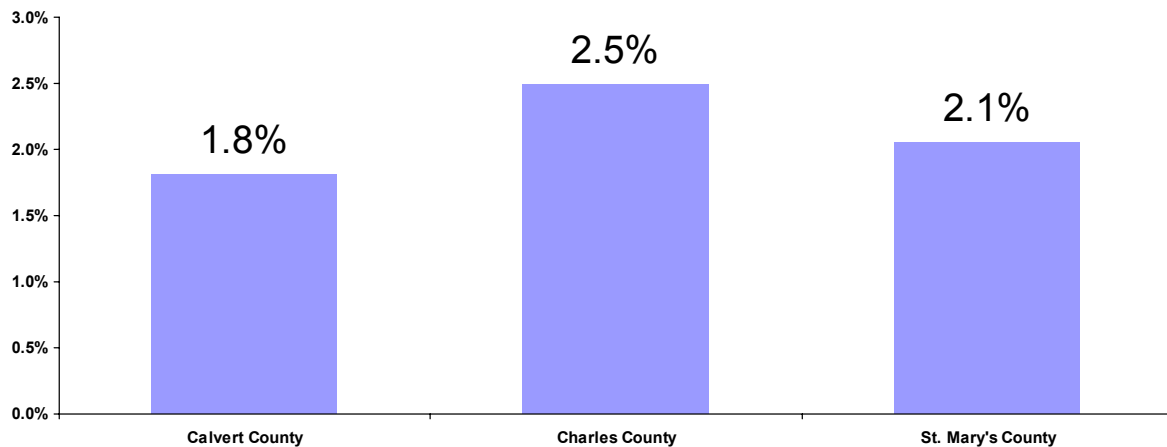
Source: Claritas Inc. and Maryland State Data Center.

				Change 1990 to 2000				Change 2000 to 2010			
St. Mary's County				Total		Annual		Total		Annual	
	1990	2000	2010	#	%	#	%	#	%	#	%
Population	75,974	86,211	100,800	10,237	13.5%	1,024	1.3%	14,589	16.9%	1,459	1.6%
Households	25,500	30,642	37,550	5,142	20.2%	514	1.9%	6,908	22.5%	691	2.1%

Source: Claritas Inc. and Maryland State Data Center.

Note: annual change is compounded rate

Annual Household Growth Rate 2000-2010



State projections indicate that through 2010 Southern Maryland will continue to grow at a faster pace than the State although more slowly than during the previous decade. By 2010, the region is projected to gain 53,480 persons and 23,543 households for a total of 334, 800 persons and 121,300 households or approximately 5.5 percent of the State total. Charles County is forecast to grow the fastest and remain the largest of the three counties while Calvert County is projected to increase the slowest and remain the smallest Southern Maryland County.

Demographic Characteristics

In 2000, Southern Maryland as a whole had a slightly larger percentage of its population aged from 35 to 44 years than the State of Maryland as a whole (18.8 percent versus 17.3 percent) (Table 9). Reflective of the predominance of young families, the region also exhibited a much larger proportion of children under 17 years of age than the State (28.8 percent versus 25.6 percent) but a much smaller proportion of pre-retirement and retirement age adults over 60 (12 percent versus 15 percent). In terms of the breakdown by county, Calvert County had the largest amount of children under 17 and of adults from 35 to 54 years of age while St. Mary's County had a slightly higher number of seniors than the other two counties (Table 10).

Table 9
2000 Age Distribution - Maryland and Southern Maryland

	Maryland		Southern Maryland	
	#	%	#	%
Under 10 yrs	744,711	14.1%	43,194	15.4%
10-17 years	611,461	11.5%	37,593	13.4%
18-24 years	450,922	8.5%	21,580	7.7%
25-34 years	748,521	14.1%	38,931	13.8%
35-44 years	916,156	17.3%	52,859	18.8%
45-54 years	755,032	14.3%	39,399	14.0%
55-59 years	268,647	5.1%	14,192	5.0%
60-64 years	201,729	3.8%	9,718	3.5%
65-69 years	168,242	3.2%	7,339	2.6%
70-74 years	153,043	2.9%	6,104	2.2%
75 and older	278,022	5.2%	10,411	3.7%
TOTAL	5,296,486	100.0%	281,320	100.0%

Source: U.S. Census of Population and Housing, 2000

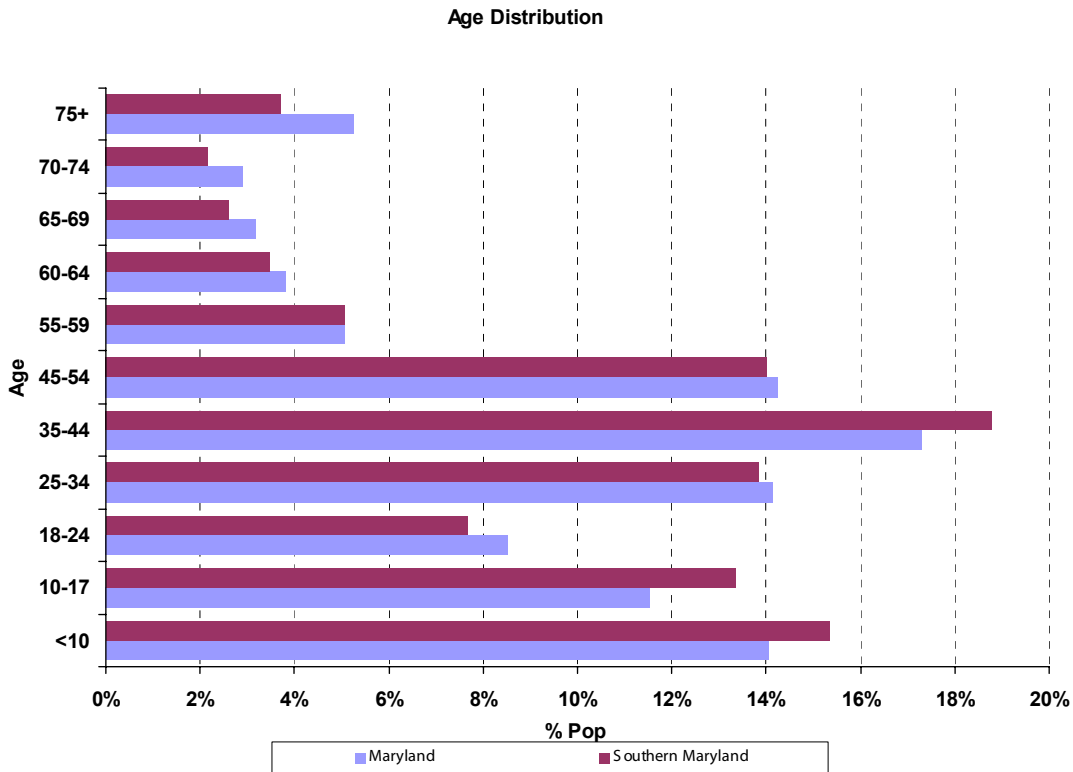
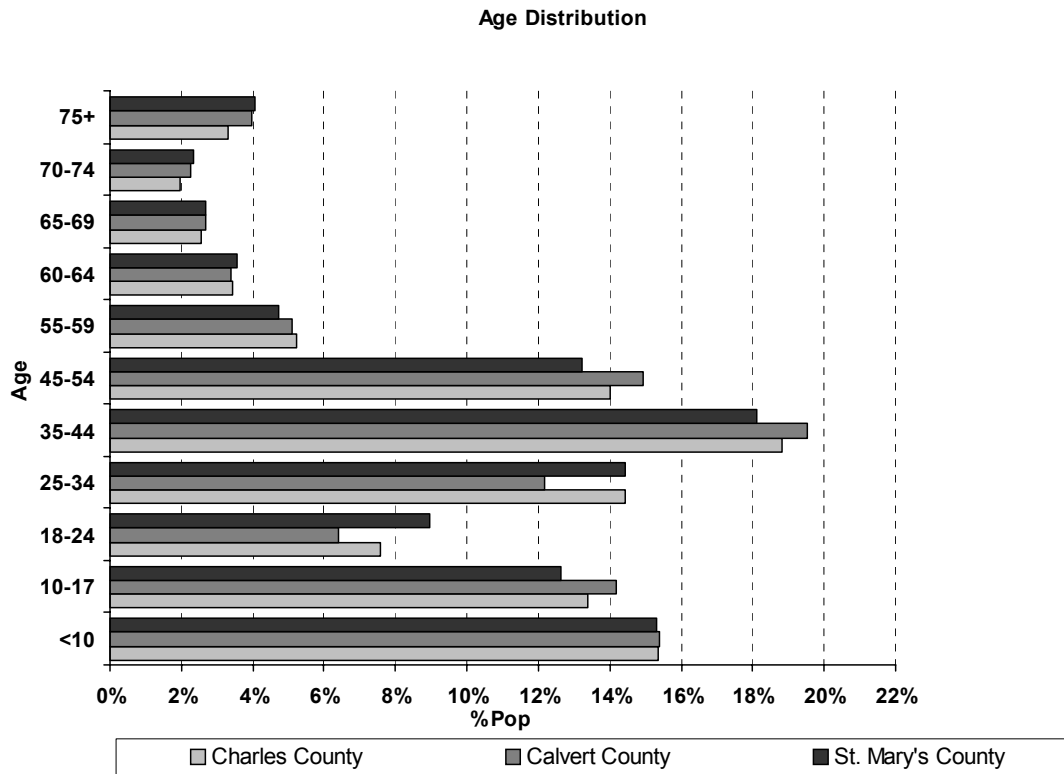


Table 10
2000 Age Distribution - St. Mary's, Calvert and Charles County

	St. Mary's County		Calvert County		Charles County	
	#	%	#	%	#	%
Under 10 yrs	13,205	15.3%	11,475	15.4%	18,514	15.4%
10-17 years	10,875	12.6%	10,581	14.2%	16,137	13.4%
18-24 years	7,704	8.9%	4,768	6.4%	9,108	7.6%
25-34 years	12,453	14.4%	9,082	12.2%	17,396	14.4%
35-44 years	15,622	18.1%	14,553	19.5%	22,684	18.8%
45-54 years	11,392	13.2%	11,141	14.9%	16,866	14.0%
55-59 years	4,084	4.7%	3,814	5.1%	6,294	5.2%
60-64 years	3,051	3.5%	2,522	3.4%	4,145	3.4%
65-69 years	2,299	2.7%	1,985	2.7%	3,055	2.5%
70-74 years	2,037	2.4%	1,694	2.3%	2,373	2.0%
75 and older	3,489	4.0%	2,948	4.0%	3,974	3.3%
TOTAL	86,211	100.0%	74,563	100.0%	120,546	100.0%

Source: U.S. Census of Population and Housing, 2000



Southern Maryland as a whole had more married residents with or without children than the State in 2000 (59.7 percent versus 50.2 percent). Conversely, the region had fewer single-person

households than the State (18.2 percent versus 25.0 percent) and fewer non-married households without children (11.9 percent versus 14.6 percent). Of the three Southern Maryland counties, Calvert had the most married households, St. Mary's the largest amount of singles and Charles the largest amount of non-married families without children and female-headed households with children.

Given the characteristics of the housing stock in the region and the commuter economy, it is not surprising that the Southern Maryland region had a much larger amount of owner-occupied dwelling units than the State (78.0 percent versus 67.7 percent). Over 85 percent of Calvert County residents owned their home in 2000, the highest percentage of the three counties. St. Mary's County demonstrated the largest proportion of renters, 28.2 percent.

Travel and Tourism

According to the Maryland Office of Tourism Development's FY 2001 Annual Report, approximately 472,269 person trips were made to the Southern Maryland region of Calvert, Charles and St. Mary's Counties during 2000, a reduction of 31,036 trips or 6.2 percent from 1999. The FY 2002 Annual Report indicates 644,268 person trips were made to Southern Maryland, an increase of 36.4% over FY 2001. Because of the limited sampling conducted of Southern Maryland visitors, these data may fluctuate due to statistical variation rather than as a result of changing travel behavior. However, the information is instructive, if only for comparison purposes.

	1999	2000	Change '99-'00	% Change '99-'00	2001	Change '00-'01	% Change '00-'01
Person Trips	503,305	472,269	-31,036	-6.2%	644,268	+171,999	0.364

Source: FY2002 Annual Report, Maryland Office of Tourism Development

In 2000, the largest numbers of visitors to the region were Virginia residents (21.0 percent) followed by Pennsylvania visitors (19.6 percent), Maryland households (13.3 percent) and North Carolina households (10.4 percent). In 1999, Maryland residents had constituted by far the leading source of visitation to the area. For the state as a whole, the four major states of visitor origin in 2000 were Maryland, Pennsylvania, Virginia and New Jersey. In 2001, the largest numbers of visitors to Southern Maryland were Virginia residents (21.0 percent) followed by Pennsylvanians (19.6 percent), Marylanders (13.3 percent) and North Carolinians (10.4 percent).

Origin	2000	2001	% Change
Virginia	21.0	10.3	-51.0
Pennsylvania	19.6	21.3	8.7
Maryland	13.3	20.8	56.4
Georgia	0.0	17.2	n/a

Source: FY2002 Annual Report, Maryland Office of Tourism Development

More than two-thirds of the visits made to the region in 2000 were pleasure trips, approximately 80 percent of visitors to the area traveled by automobile and a little over a third stayed in paid accommodations. The average Southern Maryland visitor stayed 2.8 days versus 2.5 for the state as a whole, spent \$182 versus the State average of \$301 and had an average household income of \$60,900, a little less than the State average of \$66,900. The number one activity for regional visitors was seeing historic sites and museums (15.4 percent) followed by shopping (12.2 percent) and attendance at sports events (11.7 percent), most likely the motor sports and fishing events. In comparison, the most popular activity of Maryland visitors was shopping (26.8 percent), followed by visits to historic sites and museums (13.1 percent) and by visits to beaches (12.7 percent). Only 3.8 percent of all Maryland visitors attended sporting events in 2000.

In 2001, the average household travel party size traveling was 1.9 persons, and the average trip duration was 3.2 days. Average household trip expenditures were \$360.00 per household for food, lodging, entertainment and recreation, transportation (auto and public), retail goods, and travel planning, an increase of over 97% from the previous year. Outdoor activities ranked the highest in visitor pastimes, 16.2%, an increase of 110% over 2000. Shopping was the second most popular activity at 13.4%, followed by theme/amusement parks at 7.2%, cultural events and festivals at 7.0%, and historic sites and museums at 5.4%.

All three counties collect an amusement and admissions tax, but their rates are somewhat different. Charles County's 10 percent rate accrued \$748,473 in FY01, an increase of 4.1 percent over the previous year, and \$812,421 in FY02, an increase of 8.5percent over 2001. St. Mary's County's 2.0 percent rate accrued \$85,340 in FY01, a loss of 2.4 percent over the previous year, and \$102,828, an increase of 20.5percent over '01. In FY01 Calvert County's 1.0 percent rate accrued \$76,594 ('00-'01 trend data not available for this County), and in FY02 it accrued 80,266, an increase of 4.8percent. Together, the three counties took in a total of \$910,407, two percent of the State's total amusement and admission tax.

Until 2000, only Charles County collected hotel/motel taxes but St. Mary's County began to do so in FY01. Both charge a five percent tax of their respective lodging facilities. Hotel/motel tax revenues in FY01 in Charles County totaled \$638,054, a gain of 17.4 percent over the previous year, and \$691,051 in FY'02, a gain of 8.3 percent over FY01. In St. Mary's County, hotel/motel

tax revenues totaled \$301,441 in FY01 and \$343,778 in FY02, a gain of 14.0 percent. Total tourism taxes collected in Southern Maryland during FY01 and FY02 are shown in below:

County	Total Tourism Taxes FY01-FY02
Calvert	\$80,266
Charles	\$1,503,472
St. Mary's	\$446,606

The data on the impact of travel on Southern Maryland counties provided in the 2000 U.S. Travel Data Center study (prepared for the Maryland Office of Tourism Development) indicates that in 2000, Southern Maryland accounted for \$158,990,000 in travel expenditures, and 10,000 tourism-related jobs. A study prepared in 2001 by the Research Department of the Travel Industry Association of America indicated the following economic statistics:

2001 Tourism Economic Impacts in Southern Maryland						
County	Expenditures (\$ Millions)	Payroll (\$ Millions)	Employment (\$ Millions)	State Tax Receipts (\$ Millions)	Local Tax Receipts (\$ Millions)	Total Impact
Calvert	49,560,000	12,830,000	620,000	2,430,000	3,360,000	68,800,000
Charles	64,640,000	17,260,000	84,000	3,570,000	3,160,000	88,714,000
St. Mary's	31,330,000	8,040,000	370,000	1,640,000	2,340,000	43,720,000
TOTAL	145,530,000	38,130,000	1,074,000	7,640,000	8,860,000	201,234,000

Source: "The Economic Impact of Travel On Maryland Counties 2001", MD Office of Tourism and the Travel Industry Association of America

Major Attractions

A total of 30 venues were identified in the region that attract at least 3,000 visitors a year (Table 11). Only three of the 30 venues attract over 100,000 persons annually: Point Lookout State Park in St. Mary's County (417,000 visitors), the Maryland International Raceway in St. Mary's County (153,614 visitors) and Calvert Cliffs State Park in Calvert County (112,397 visitors). Very few of the attractions generate non-regional visitation and only the motor racing events generate significant overnight stays. Most are not drawing bus tours. Overall visitation to these attractions has been stable or has actually decreased during the last three years.

Over a third of the thirty venues can be classified as heritage tourism sites while almost half are state parks, offering a range of active and passive recreational opportunities. The most visited heritage sites are Smallwood State Park south of Indian Head (74,590 visitors, most of which visit the park for the recreational rather than the historic resources) the Calvert Marine Museum in Solomon's (68,014 visitors), Historic St. Mary's City (58,296 visitors) and Pax Naval Air

Museum in Lexington Park (49,377 visitors). The old Naval Air Museum was recently demolished and is in interim quarters. Construction of a new larger facility will begin as soon as funding is secured.

Besides the 30 attractions, there are also a significant number of County-operated parks throughout the region that offer swimming, boating, fishing/crabbing, kayaking/canoeing, hiking, cycling, horseback riding and bird watching opportunities. Calvert and Charles County each contain two 18-hole golf courses; St. Mary's has three. The three counties together have approximately 30 marinas with more than 3,500 slips.

**Table 11- Major Attractions
Southern Maryland**

Name	Months Open	Days	Hours	# of Visitors '00-'01	Location	Fees
Annamarie Gardens*	Yearly	Daily	10am-4pm	48,743	Solomons	Free
Breezy Point Park	May - Oct.	Daily		39,425	Chesapeake Beach	Adults-\$4 Child-\$2
Calvert Marine Museum*	Yearly	Daily	10am-5pm	68,041	Solomons	Adults-\$5 Child-2
Chesapeake Railway Museum*	May-Sept. Apr.-Oct.	Daily Weekends	1pm-4pm 1pm-4pm	10,793	Chesapeake Beach	Free
Cypress Swamp Sanctuary	Yearly	Tuesday-Sunday	Tues.-Sat. 10am-4:30pm Sun. 1pm-4:30pm	10,076	Prince Frederick	Free
Flag Ponds Nature Park	Yearly	Daily - Mem.-Lab.Day Wkns - Oct.-Apr.	Mem.-Labor Day 9am-6pm Oct.-Apr. 9am-5pm	20,862	Lusby	\$4-\$6 per vehicle
Jeff. Patt. Park & Museum*	Apr.15 - Oct.15	Wednesday-Sunday	10am-5pm	25,764	St. Leonard	Free
Calvert Cliffs State Park	Yearly	Daily	Sunrise to Sunset	112,397	Lusby	\$3
Ches. Beach Water Park	May - Sept	Daily	11am-8pm	40,200	Chesapeake Beach	Adults-\$5-13 Child-\$4-11
Kings Landing Park	Yearly	Daily-Mem-Lab, Apr. M-F- May, Sept., Oct. Wkns-Nov.-Mar.	8:30am-5pm 8:30am-4:30pm 8:30am-8pm		Huntington	Free
Dr. Samuel Mudd House*	April-November	Saturday-Sunday Wednesday	12pm-4pm 11am-3pm	3,500	Waldorf	Adults-\$3 Child-\$
Thomas Stone Historic Site*	April-October November-March	Daily Thursday-Sunday	9am-5pm 9am-5pm	3,820	Port Tobacco	Free
Smallwood State Park	Yearly	Daily	Sunrise to Sunset	74,590	Marbury	\$2, weekends May-September
Cedarville State Forest	Yearly	Daily	Sunrise to Sunset	42,594	Waldorf	Free
Chapel Point State Park	Yearly	Daily	Sunrise to Sunset	9,114	Port Tobacco	Free
Purse State Park	Yearly	Daily	Sunrise to Sunset	4,661	Indian Head	Free
St. Clement's Is. Museum*	Yearly	Monday-Friday Saturday, Sunday	9am-5pm 12pm-5pm	5,400	Colton's Point	Adults-\$1 Child-Free
Piney Point Museum*	May-October	Friday-Monday	12pm-5pm	8,000	Piney Point	Free

**Table 11- Major Attractions
Southern Maryland**

Name	Months Open	Days	Hours	# of Visitors '00-'01	Location	Fees
Historic St. Mary's City	March-December	Wednesday-Sunday	10am-5pm	58,296	St. Mary's City	Adult-\$7.50 Child-\$3
Sotterley Plantation*	May-October	Tuesday-Sunday	10am-3pm	15,200	Hollywood	\$7
Old Jail Museum Tudor Hall*	Yearly	Monday-Friday	Jail 12pm-2pm, Hall 10am-2pm	3,000	Leonardtown	Free
Pax Naval Air Museum*	Yearly	Tuesday-Sunday	10am-5pm	49,377	Lexington Park	Free
Point Lookout State Park	Yearly	Daily	8am-Sunset	417,595	Scotland	\$3 May-Sept.
Greenwell State Park	Yearly	Daily	8am-Sunset	22,384	Hollywood	\$3 May-Sept.
St. Mary's River State Park	Yearly	Daily	8am-Sunset	42,218	Leonardtown	\$3 May-Sept.
St. Clement's Is State Park	Yearly	Daily	8am-Sunset	14,457	Colton's Point	\$3 May-Sept.
Maryland Int'l Raceway	March-October	Weekends/Special Events		153,614	Budds Creek	Varies
Budds Creek Motocross	Yearly	Weekends/Special Events		46,000	Budds Creek	Adult-\$10 Child-\$5
Potomac Speedway	March-October	Saturday Night		21,394	Budds Creek	Varies
				TOTAL ATTENDANCE:	1,371,515	

*Note: Total Museum attendance: 241,638

Source: Various attractions and County Tourism Organizations

In addition to the planned construction of the new Naval Air Museum, a few other major tourist attraction investments are proposed in Southern Maryland. These include: the construction of a new visitors/ interpretive center at Annmarie Garden as well as the expansion of the gardens, \$75 million in improvements to Historic St. Mary's City, the development of the 2,200-acre Chapman's Landing as a recreational/tourism resource, MacIntosh Run Park at Leonardtown and waterfront redevelopment on Breton Bay, and facilities expansion at Piney Point.

Special Events/Festivals

A total of 14 major special events/festivals take place each year in Southern Maryland (Table 12). Eight of the 14 special events/festivals occur in St. Mary's County and the rest occur in Calvert County. By far, the largest events in the region are the annual Pax River Naval Air Show which draws approximately 65,000 persons to Lexington Park in September, the River Concert Series which attracts approximately 25,000 persons to Historic St. Mary's City during the summer and the Oyster Festival, with an estimated attendance of 16,000, which takes place in October at the St. Mary's County Fairgrounds. Both the Naval Air Show and Oyster Festival attract attendance from non-residents. The largest events in Calvert County are the Annmarie Gardens Artsfest in September (15,000 persons), the Celtic Festival at Jefferson Patterson Park in April (10,000 persons) and the Calvert Marine Museum concerts in May and September (5,000 persons per concert).

**Table 12
Major Festivals
Southern Maryland, 2001**

Event	Location	Month	Attendance
Celtic Fest of So. Md.	Jefferson Patterson Park	April	10,000
Bay Fest	North Beach	August	6,000
Artsfest	Annmarie Gardens	September	15,000
Calvert Marine Museum Concerts (2)	Solomons	May, September	10,000
Christmas Walk	Solomons	December	7,000
Patuxent River Appreciation Days	Solomons	October	6,500
So Md Quilt Show	Sotterley Plantation	May	1,350
Potomac Jazz/Seafood Festival	Colton's Point	July	600
Governor's Cup Yacht Race	St. Mary's City	August	2,500
Pax River Navy Air Show	Lexington Park	September	65,000
St. Mary's County Oyster Festival	St. Mary's County Fairgrounds	October	16,000
Blue and Gray Days	Point Lookout State Park	May	500
Blessing of the Fleet	St. Clement's Island	October	10,500
River Concert Series	St. Mary's City	Summer	25,000
Charles County Fair	Charles County	September	55,620
TOTAL ATTENDANCE			231,570

Source: Various events and County tourism organizations.

Tourism Support Services

Equally as important to the success of a heritage region as the historic attractions is the desirability and attractiveness of tourism support facilities in the form of unique accommodations, restaurants and shopping. These tourism support facilities provide excellent opportunities for private investment, especially in terms of small business retention and attraction. As expected, given the limited development of major tourist attractions in Southern Maryland, there is not a substantial level of tourism-support services, in comparison to some other heritage areas. Moreover, these support services are not evenly distributed throughout the region.

Accommodations

Each of the Southern Maryland counties offers the range of overnight accommodations: bed/breakfasts, hotels/motels, cabins/cottages and campgrounds (Table 13). Altogether, the three counties contain a total of 3,780 rooms/sites, 43.5 percent of which are located in St. Mary's County (primarily campsites), 35.9 percent are in Charles County (primarily hotel/motel rooms) and the remainder or 20.1 percent are in Calvert County.

Table 13

Accommodations - Southern Maryland

	Bed/Breakfasts		Hotels/Motels		Cabins/Cottages		Campgrounds	
	Number	Rooms	Number	Rooms	Number	Rooms	Number	Sites
Calvert County	12	54	6	537	2	14	2	170
Charles County	2	5	15	1159	1	3	3	191
St. Mary's County	6	18	10	712	1	9	6	928
Total	20	77	30	2388	4	26	11	1,289

Source: County tourism agencies.

Of the three counties, Charles County has the largest amount of hotel/motel rooms, most of which are situated along the Rt. 301 corridor between Waldorf and La Plata. The Holiday Inn in Waldorf, the only full-service facility in the County, offers a limited amount of meeting space. Occupancy at the higher-end facilities ranges from 60 to 69 percent. Average daily rates are in the \$60 to \$75 range. The primary source of occupancy is commercial travel followed by pass-through Rt. 301 traffic. The Charles County motels/hotels also cater to a modest number of bus tours and school groups visiting Washington, D.C.

Charles County contains the smallest amount of bed/breakfast accommodations, only two facilities with a total of 5 rooms. Annual occupancy at these two facilities averages approximately 50 percent.

St. Mary's County has the second highest number of hotel/motel rooms and of bed/breakfasts, although the bed and breakfast inventory is still quite limited. It also contains almost 950 campsites. The hotel/motel inventory is concentrated in Lexington Park while the bed and breakfasts are scattered throughout the County, generally close to the water. There are no full-service hotel/motel facilities in St. Mary's County but a modern Days Inn and a Hampton Inn are located in Lexington Park and cater almost entirely to business travelers and those visiting local residents. Occupancy at the better facilities averages approximately 70 percent and the average daily rate is \$75.

The other types of accommodations in St. Mary's County (bed/breakfasts, cottages and campgrounds) do attract tourists. The bed/breakfasts and cottages report a 50 to 55 percent annual occupancy rate. While there currently exists very little meeting space in St. Mary's County, a new 80-room Fairfield Inn will open in January 2003 adjacent to Pax River Naval Air Station. A state of the art 15,000 square-foot secure conference center opened in December 2002 on the same parcel.

Calvert County displays the fewest hotel/motel rooms and the fewest campsites but the largest number of bed/breakfast rooms. The hotel/motel accommodations are concentrated in Solomon's and Prince Frederick. The County's only full-service motel, the Holiday Inn in Solomon's, has 20,000 square feet of meeting space, by far the largest amount available or under construction at private facilities in Southern Maryland. Meeting attendees primarily reside in the Baltimore/Washington area. Almost 50 percent of the motel's occupancy is attributable to conferences and another third to commercial travel, largely to the Naval Air Station. Occupancy at the better County motels is approximately 65 percent, with an average daily rate of \$76.

Calvert County bed/breakfasts are primarily located in and near Solomon's Island although this type of accommodation is also slowly being provided in the northern part of the County, in and around Chesapeake/North Beach. Similar to the occupancy at the bed/breakfasts in the other two counties, the occupancy at the bed/breakfasts in Calvert County is in the 50 to 55 percent range.

Besides the aforementioned Fairfield Inn under construction in St. Mary's County, efforts are under way to construct lodging in Chesapeake Beach, North Beach, Leonardtown and Pinefield. Preliminary discussions have also begun in Solomon's. The proposed North Beach facility will be a European-style, 40-suite hotel while the proposed Chesapeake Beach facility will contain 70 suites with fireplaces and cater to the more than 60,000 charter boat fishermen, who travel to northern Calvert County annually. Both the Leonardtown and the Pinefield facilities would be components of larger mixed-use developments with signature golf courses and conference centers.

Restaurants/Entertainment

Each of the three Southern Maryland counties contains a concentration of chain restaurants, both family style and fast food. Of the three counties, Charles County has the largest amount of chain restaurants, followed by St. Mary's County while Calvert County offers the largest amount of unique, non-chain eating opportunities. St. Mary's County exhibits the second largest amount of unique restaurants in Southern Maryland. By far the most prevalent types of cuisine are seafood and American food (including barbecue restaurants), with the region containing a total of almost 40 of each of these types of restaurants.

Calvert County's chain restaurants are primarily located in Prince Frederick while the majority of its unusual restaurants are in the Solomon's area. Charles County's chain restaurants are dispersed along the Rt. 301 corridor from Waldorf to La Plata; its more interesting establishments are scattered around the County, many at waterfront locations. Chain restaurants in St. Mary's County are located in the heavily-commercialized Lexington Park area. Its unique facilities are also scattered throughout the major municipalities such as Leonardtown and at waterfront locations. Aside from the bars in Solomon's and the racing, nighttime entertainment in the region is very limited, both for families and couples.

Shopping Facilities

All three of the counties offer a limited amount of specialty shoppers goods in the form of antique stores, art/crafts, and gift shops. Calvert County boasts the widest selection of these goods; the largest grouping is located in Solomon's but antique centers are also situated in North Beach/ Chesapeake Beach, Huntingtown and St. Leonard. Charles County's unique shopping is in the Bryantown Historic District, Waldorf, La Plata, Hughesville and Indian Head, while St. Mary's County's is concentrated in Leonardtown. The latter county also has an arts and crafts co-op in Great Mills and the largest selection of seafood and farmers/produce markets in Southern Maryland. Plans are underway to develop a permanent farmers/watermen's market in Prince Frederick and in two locations in St. Mary's County. Seasonal farmer's markets currently take place in each of the three counties.

Visitor and Information Centers

The State of Maryland operates a welcome center in Southern Maryland on Rt. 301 (Crain Memorial Highway) in Charles County, just north of the Governor Nice Memorial Bridge to Virginia. It is open daily. In FY01, there were 119,722-recorded visitors to the facility, a decrease of 4.6 percent from FY00, but an increase of 21.6 percent or 13,710 persons over the FY98 level. Of the State's 14 welcome centers, the Crain Memorial facility ranked 9th in total visitation during FY01. Besides the Crain Memorial Welcome Center, Charles County visitors can also obtain information from the County Chamber of Commerce office and the Chamber of Commerce Tourism office, off of MD. Rt. 301 in La Plata.

In addition to the State Welcome Center, five other major visitor centers are located in the region, three in Calvert County and two in Saint Mary's County. The Calvert County facilities

are situated in Solomon's off of MD Rt.4, Fairview at the library off of MD Rt.4 and at North Beach and are operated by the Calvert County Chamber of Commerce under contract to the Department of Economic Development. None of the three facilities are open daily, year round but they are open on weekends during the off-season and daily during the peak season. During FY2001, 23,147 persons visited the Solomon's Info Center, 9,715 persons visited the Fairview Info Center and 7,350 persons visited the North Beach Welcome Center. A small Visitor Information Center with a brochure rack is also located in the Department of Economic Development office in Prince Frederick.

The St. Mary's County visitors centers include one run by the St. Mary's County Historical Society located in the Old Jail in Leonardtown, and one operated by the St. Mary's County Chamber of Commerce in its offices off of MD Route 5 in Mechanicsville. The Chamber of Commerce visitor center had 2,560 visitors in 2001. The Leonardtown facility is open on a very limited basis, while the Mechanicsville facility is open Monday through Friday, 9 a. m. to 5 p. m., year round and weekends, 10 a. m. until 3 p.m., from the end of March until the beginning of October. The County's Department of Economic Development has a brochure rack with information on St. Mary's County.

Economic Development and Tourism Organizations

There are a sufficient number of economic development and tourism promotion agencies operating in Southern Maryland and some very impressive cooperative endeavors. In both Calvert County and St. Mary's County, the tourism agency is a division of the Economic Development Department and thus staff of each works closely together on a daily basis. In Charles County, however, the Economic Development Commission is a quasi-public agency, separate from the County government. The Charles County Office of Tourism is a department within County government. Each of the counties has a chamber of commerce as well. Additionally, the Tri-County Council for Southern Maryland focuses on regional planning issues, facilitating communication between the three counties and developing a technology infrastructure. One member of its staff concentrates on economic development issues.

Cooperative Endeavors

There are two unusual cooperative endeavors currently in operation in Southern Maryland: the Southern Maryland Travel and Tourism Committee and the Southern Maryland Economic Development Association. The Southern Maryland Travel and Tourism Committee consists of 18 members appointed by the respective Board of Commissioners from each of the three counties. The primary purposes of the Committee are to establish a cooperative regional marketing program and to increase communication between the regional visitor industry and local and state officials. To those ends, the Committee has cooperated in a wide range of endeavors including advertisements in a variety of magazines, attendance at trade shows, participation in familiarization tours, development of a regional website, participation in legislative events and the development of the Southern Maryland Driving Tour Brochure. The

tourism offices of the three Southern Maryland counties recently received a Cooperative Marketing Award at the annual Governor's Conference on Tourism.

The Southern Maryland Economic Development Association consists of the three economic development directors and the chairs of their commissions, the chairs of the three chambers of commerce, representatives of the Patuxent Partnership (a cooperative organization to maximize the economic potential from the Naval Air Station), the Tri-County Council for Southern Maryland, the Naval Energetics Technology Alliance, the Southern Maryland Naval Alliance, Southern Maryland Works, Inc., the Maryland Department of Business and Economics, and the College of Southern Maryland's Economic Development and Community Institute, the executive directors/presidents of Southern Maryland Chambers of Commerce, and the chair of the Southern Maryland Travel and Tourism Committee. The Association meets quarterly to develop and implement a regional marketing plan of action for agriculture, economic development, education, environment, and transportation.

Issues and Opportunities

The following issues and opportunities regarding heritage program development in Southern Maryland are the result of marketing research and public opinion gathered at a series of public workshops hosted by the Southern Maryland Heritage Area Steering Committee in November and December of 2001 in Calvert, Charles, and St. Mary's Counties. At each workshop, community organizations and county residents were invited to participate in discussions of the most compelling issues, i.e., challenges and constraints, to be considered during the development of the Southern Maryland Heritage Area Tourism Management Plan. Following this discussion, participants were asked what they considered to be the greatest opportunities for enhancing heritage program development in the region.

Many of the issues and opportunities that residents and community organizations instinctively felt could have a potential impact on heritage program development were the same as those identified through market research and studies conducted by regional tourism and economic development offices.

Issues

Lack of Recognition and Identity. The Southern Maryland Heritage Area has no identifiable image for non-residents, tourists and marketing personnel. Other areas of Maryland such as Ocean City and Annapolis are more recognizable to the typical visitor.

Congestion. The major access routes to the area such as MD Rts.210, 310 and 2/4 are becoming increasingly congested, which could discourage tourists from visiting the area. This congestion is particularly acute on Friday afternoons when visitors might plan to arrive in the region. Meanwhile, public transportation to and within the region is quite limited.

Lack of a Major Draw. There is no major attraction or special event in the area aside from the motor sports events and the Pax River Naval Air Show that draws a large attendance from outside the region or generates overnight visitation. The largest attendance venues are Point Lookout State Park (417,595 persons), the Maryland International Raceway (158,615 persons) and Calvert Cliffs State Park (112,397 persons). These are the only attractions in the region that draw over 100,000 visitors annually. Of the 5 state tourism regions, the Southern Maryland region experiences by far the lowest annual number of person trips; the next highest region, the Western Region (Allegany, Garrett, and Washington counties) exhibits more than twice the number of annual person trips. Annual visitation to many of the region's major attractions has remained stable or has decreased slightly over the last few years.

Limited Group and Meeting Market. Current visitation to the region by bus tours and conference attendees is modest due to the constrained amount of overnight accommodations, meeting space and the lack of visibility.

Seasonal Visitation. Visitation to the region occurs primarily during the summer months; most area attractions and visitor centers are not open daily all year round.

Lack of an Attractive Gateway. The existing access routes to the region are not only congested but also unattractive in the eyes of the typical heritage tourist who desires to travel along less heavily traveled and more scenic routes. It will be difficult to maintain the heritage tourist's interest until he/she reaches their ultimate destination.

Continuing Growth Pressures. The Southern Maryland region is projected to continue to grow at a faster pace than the State with an additional 23,543 households residing in the area by 2010. The continuing strong economic growth of the region could increase congestion and threaten the long-term viability of the historic and nature-based tourism resources and landscape.

Expansive Area. While there is an impressive amount of historic and nature-based resources located in the Southern Maryland region, they are dispersed over an expansive area that is also composed of nodes and corridors of uncontrolled growth. The heritage area will have to be pared down in order to maximize the visitor experience.

Competition. Not only does the Southern Maryland area face competition from Washington, D.C., the Eastern Shore and other nearby clusters of attractions, but also from the existing and planned State-recognized heritage areas that are competing for the same visitors and the same financial support. It will be essential to differentiate the area from its competition and to insure a pleasurable visitor experience that fosters repeat trips.

Minimal Interstate Access and Drive-Through Traffic. Currently, no interstate highway passes through the region, the nearest being the Capitol Beltway. Given the region's configuration, a peninsular surrounded on three sides by water, it is not likely that an interstate highway will be

constructed through the area. The only pass-through traffic is on MD Rt. 301. Its welcome center demonstrates one of the lowest visitor counts of the State's 13 welcome centers.

Budgetary and Manpower Constraints of Existing Attractions. Since most of the region's historic attractions demonstrate low visitation, they also have constrained budgets and many operate entirely through volunteers and donations. While this is not unusual, it results in uncoordinated hours of operation, insufficient hours of operation and in a lack of coordination between facilities. This, in turn, limits visitation potential, especially bus tours. In addition, most area attractions do not maximize visitor expenditures by providing food and shopping on site.

Historic Resources under Private Ownership. Many of the historic resources, particularly the tobacco barns, are under private ownership; the only existing constraint to their demolition is the cost to the owner. The projected growth in the region can only serve to make these resources more fragile.

Minimal Unique Accommodations and other Visitor Services. The region is currently lacking in the amount of unique accommodations, restaurants and shopping when compared to many other heritage areas. Therefore, it is not well known for providing these services. In addition, the facilities that do exist are not always in close proximity to the heritage resources. For example, there are no lodging, eating/drinking facilities and shopping opportunities near St. Mary's City.

Capacity to Support Greater Visitation. Many of the existing clusters of heritage resources such as Port Tobacco, Solomon's Island and the Amish community are limited in their ability to accommodate a substantial increase in visitation.

Lack of Water/Beach Access. Despite the fact that Southern Maryland is bounded by the Chesapeake Bay and the Potomac and Patuxent Rivers, public access to the water for boating, swimming and other recreational pursuits is constrained.

Coordination of Existing Visitor Centers. At present, each of the three counties has a different method of providing information centers for tourists. Charles County relies almost entirely on the services of the Crain Memorial Welcome Center, St. Mary's County has two facilities which are only open during the week for half of the year and for limited weekend hours during the peak season, while Calvert County's three centers are only open on weekends off-season. This makes it quite difficult for the typical visitor to coordinate a trip to the Southern Maryland region and for the season to be expanded.

Protected Resources Without Public Access. While the State and local governments have become more aggressive in purchasing and protecting valuable historic and natural resources in Southern Maryland, many of these resources are not yet open to the public. Strategies need to be devised to make the resources accessible without requiring substantial expenditures and manpower.

Opportunities

Changing Demographics. Throughout the last decade, Southern Maryland grew at a faster pace than the State and added 52,820 residents who provide a built in market for the heritage tourism. The expansion at Pax River Naval Air Station is also of considerable significance because it attracts visitors for all of the United States and internationally as well.

Strong and Stable Economy. Recently, the Southern Maryland economy has outperformed the State economy in terms of unemployment. The presence of the Navy and its attendant contractors will continue to provide stability to the region.

Growth in Day-Tripper and Nearby Population. Nearby states that comprise the bulk of tourists to Maryland and the region (Virginia, Pennsylvania, North Carolina and New Jersey) are all projected to gain population over the next few years.

Proximity to Washington D. C., Baltimore and Annapolis Tourism Nodes. Although competition, the existence of these nodes signifies the region's acceptability and visibility for heritage tourism purposes. Washington, D. C. generates a multitude of bus tours, conventions and school tours each year.

Recent and Planned Revitalization Activities in Solomon's, North Beach/ Chesapeake Beach, Leonardtown and Lexington Park. Recent accelerated revitalization of these downtowns is conducive to the attraction of visitors to the region and provides desirable locations for much needed tourist-support services.

Water as an Important Amenity. Access to water for recreational and relaxation purposes cannot be overstated in terms of its potential drawing power. The region's access to the Potomac and Patuxent Rivers and the Chesapeake Bay draws sailing and fishing visitors. Charter fishing trips, boat rentals and marinas facilitate these interests.

Manageable and Pedestrian-Friendly Historic Areas. Many of the historic resources in the region are clustered together in such a way as to reduce travel times between attractions and to provide the visitor with a complete heritage experience. Most of them have been well preserved and protected. Aside from the tobacco barns, the majority of the region's historic resources are being put to full use.

Attraction Dispersal Each of the three counties contains at least one of the most visited attractions in the region and one of the most visited heritage attractions.

Planned Lodging. The under construction and planned inns and conference centers will help to fill a significant gap in the lodging inventory.

National Park Service Presence. The presence of a National Park Service facility in the area, the Thomas Stone Historic Site, has the potential to increase the visibility of the proposed heritage area and perhaps for financial support.

Proximity of Attractions to Recreational and Eco-tourism facilities. There exists in the proposed heritage area a unique proximity of historical and eco-tourism resources that can serve to widen the appeal of the region to visitors. The region already attracts a substantial amount of outdoor enthusiasts, especially fishermen.

Long-Term Commitment. Many of the stakeholders for the heritage area have been committed to this endeavor for quite a few years and have already begun the important process of developing public outreach and support.

Cooperative Efforts. The region's three tourism agencies are already cooperating in joint efforts to increase visitation to Southern Maryland.

Investor Interest. Even without the heritage tourism initiative, there exists investor interest in improving and/or expanding visitor attractions and support services. Significant investment is planned in each of the counties at Annmarie Gardens, St. Mary's City, Chapman's Landing, Chesapeake Beach, North Beach, Leonardtown, Indian Head, Pinefield and La Plata.

Festival Expansion. The region is not overly saturated with festivals/ events as other regions and the some that do exist are limited to one day thereby not generating overnight visitation. A coordinated event, taking place in all three counties, could begin to fill this gap. Currently, there are no major events in the region during the spring and summer.

Lack of Nighttime and Family Activities. The essential provision of nighttime and family activities could widen and lengthen visitation to the area.

Target Markets

The Heritage Visitor

A 1999 study of the characteristics of heritage tourists visiting Pennsylvania conducted for the Pennsylvania Department of Conservation and Natural Resources is instructive for the planned Southern Maryland heritage area. The study indicated that heritage tourism in that state has been growing at three times the rate of increase of leisure tourist visitation as a whole. Of all the leisure tourists that visited the state in 1997, almost half participated in heritage tourism activities of some kind. By contrast, only 16 percent of Maryland leisure tourists took part in a heritage activity.

On average, Pennsylvania's heritage travelers were married, middle-aged, middle-income, white collar, professionals. They traveled primarily in the fall, stayed about 3.3 days in the area and

spent approximately \$102 per person per day. Most were residents of Pennsylvania or adjoining states. Maryland residents comprised only 5 percent of heritage visitors to Pennsylvania in 1997. When compared to the typical leisure traveler, the typical heritage tourist was somewhat older (a baby boomer or 65 years of age or older), had a higher income (\$25,000 to \$75,000 a year) and was more educated. He/she tended to travel more often in groups, stayed a day longer in the state and spent 40 percent more per day. Over half of the parties were traveling with children and another 27 percent were adult groups with three or more persons.

The top expenditures by heritage travelers to Pennsylvania were food and beverages (26 percent), followed by shopping (24 percent) and then by lodging (20 percent) and entertainment/recreation (12 percent). When planning their trips, heritage travelers commonly employed brochures, the Internet, AAA and the advice of friends and relatives. There was a high crossover between heritage tourists and outdoor recreational travelers. More than half of the State's heritage travelers also participated in recreational activities during their trip. According to respondents, the major barriers to Pennsylvania as a heritage destination were lack of recognition, the perception that there was nothing new to see and the availability of better family activities elsewhere.

Respondents were also asked about the competitiveness of nearby states. Over 50 percent of respondents to the survey who had visited Washington, D.C. indicated that the availability of heritage tourism was an important factor in their trip planning. Similarly, 52 percent of visitors to Virginia, 45 percent of New York visitors, 43 percent of Pennsylvania visitors, 41 percent of West Virginia visitors and 35 percent of Ohio visitors stated that the existence of heritage tourism opportunities was a deciding factor in their vacation location. Only 30 percent of Maryland respondents were strongly influenced by the existence of heritage attractions in the state. Almost all of the heritage travelers to Pennsylvania visited an historic town or district, 69 percent visited a battlefield, 57 percent went to an art gallery or museum and 54 percent stopped at a natural history/science museum. Despite the existence of a variety of heritage regions in Pennsylvania, all except for Philadelphia, Gettysburg and Lancaster, were relatively unknown to the respondents. The major competitors for heritage visitors to Pennsylvania were Washington, DC, Virginia, New York and Maryland.

Eco-tourism is considered by many tourism experts to be a subset of the overall heritage market. The typical eco-tourist exhibits age, income, and educational characteristics similar to the heritage tourist; he/she also stays longer and spends more than the typical leisure tourist and is also looking for an authentic and unique experience. Similar to the general outdoor recreation enthusiast, there is substantial crossover between nature enthusiasts and heritage tourists.

The Resident Visitor

The resident market is an important target for a variety of reasons. First of all, most visitors come to the state in order to visit friends and relatives. Therefore, it is essential that residents are aware of heritage and nature-based tourism opportunities in the region and are proud to show

them to visitors. This is especially important in a growing area such as Southern Maryland. The resident market is projected to continue to grow at a faster pace than the State as a whole. By 2010, Southern Maryland is forecast to gain an additional 53,480 persons and an additional 23,543 households for a total population of 334,800 persons and 121,300 households. The Pax River Naval Air Station is and will continue to be a potent source of area visitation in terms of both friends and relatives and commercial travelers.

A second reason to target residents is that residents fill most of the hospitality jobs in the region and can therefore heavily influence a visitor's satisfaction and a visitor's knowledge of the tourism offering. Lastly, the Pennsylvania heritage survey conducted in 1997 indicated that the visitors who were least aware of heritage attractions were those who relied upon the advice of friends and relatives rather than brochures, the Internet and other types of informational sources. Thus, the importance of resident awareness cannot be overstated.

Non-resident Visitor

This component includes both day-tripper visitation and overnight visitation. Based upon the overall leisure market and the heritage surveys, the primary tourist market would be baby boomers, retirees and to a lesser extent, families with children. Other significant markets are hikers, bikers, birders and other types of outdoor recreation enthusiasts given the high degree of crossover between the heritage and outdoor recreation enthusiast. The spouses of the thousands of charter fishermen and the 3,500 households who lease boat slips in the region are untapped markets as well.

Residents of adjoining states, particularly those that indicated that heritage tourism was a strong influence on their travel planning, should be marketed including Washington, D.C., Virginia, Pennsylvania, North Carolina, and New Jersey. The five states currently comprise over half of the heritage visitation to Pennsylvania. Both North Carolina and New Jersey residents are important targets. In the case of North Carolina because visitation from that geographic source to the region appears to be growing and in the case of New Jersey because its residents are a major source of visitation statewide and less so to Southern Maryland. Also, New Jersey residents are a major component of charter fishing visitation. The five states are projected to gain over three million persons by 2015 for a total population of 38.9 million persons. Fifteen percent of the 2015 population will be composed of retirees and over 20 percent of children less than 18 years of age (Table 14).

Table 14
Population Growth of Adjoining States
2000 - 2015

Jurisdiction	2000	2015
Washington D.C.	530,000	611,000
New Jersey	8,185,000	8,832,000
North Carolina	7,789,000	9,206,000
Virginia	6,965,000	7,708,000
Pennsylvania	12,220,000	12,580,000
Total	35,689,000	38,937,000

Source: U.S. Census

It is important to note that State residents account for approximately 20 percent of State visitation, and depending upon the year, from 13 to 27 percent of regional visitation. While they may not stay overnight, State residents may visit the area more frequently and may also serve as guides to out of state friends and relatives. By 2015, the State of Maryland is projected to gain almost an additional 500,000 residents for a total population of 5,736,000 persons, of whom 13.3 percent will be retirees and 24 percent children less than 18 years of age.

Bus tours and convention attendees are other niches that have yet to be maximized in the Southern Maryland region. Spouses of convention attendees both in the area and in Washington, D. C. should be targeted as well as the attendees themselves. The new Fairfield Inn Conference Center and the other planned conference centers in Southern Maryland support the growth of this market. Rail and other types of linkages to D.C. should be explored. While there no significant bus tour presence currently exists in the region, it is near Washington, D. C., one of the most popular bus tour destinations in the country. School groups from out of state who stay in the regional accommodations should also be targeted.

Mechanisms

It is important to note that each of the three Southern Maryland jurisdictions currently has a very effective tourism-marketing program and that together they have already formed a successful cooperative alliance to market the region for heritage tourism activities. The difficulty in attracting visitation has primarily been due to the lack of product and of support services rather than to insufficient marketing. Given these and other constraints, the Southern Maryland region has done remarkably well in attracting and increasing visitation.

The Southern Maryland counties and the Southern Maryland Travel and Tourism Committee should continue their current advertising programs, trade show participation and collateral development aimed at out-of state residents. Given the growing importance of resident awareness, however, a parallel program should be developed aimed at regional and state

residents. A travel guide especially designed for residents, newspaper articles on entertaining out of state visitors, a website for residents, a passport ticketing program aimed at residents and familiarization tours for residents are just a few of the many mechanisms that could be used to increase resident awareness. Information packets aimed at Pax River employees should be developed. The importance of school programs and activities cannot be overemphasized, especially given the high proportion of children in the region.

Due to the propensity of heritage travelers to use brochures and the Internet, the continuing development of these mechanisms should be prioritized. Also, the linkages between heritage and recreational visitation and between heritage travel and shopping and eating/drinking should be used to cross promote the various activities. For example, farm tours could be coordinated with overnight accommodations on a farm and the maritime theme could be coordinated with overnight accommodations on a boat. Since most heritage travelers are attracted to historic districts and towns, the marketing programs should stress the small town ambiance of Southern Maryland. Since the typical heritage tourists spends the most on eating/drinking and shopping, the provision of these services and their marketing should be emphasized.