

MARKETING MARYLAND BYWAYS



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Maryland Byways Overview

MARYLAND BYWAYS

MARYLAND

SCENIC BYWAY

LEGEND

Historic National Road
 The original route of the National Road, built in 1808, is the longest continuous road in the United States. It runs from Washington, D.C. to St. Louis, Missouri.

Mountain Maryland
 A scenic byway that winds through the Appalachian Mountains, offering spectacular views of the Blue Ridge Mountains and the Potomac River.

Chesapeake and Ohio Canal
 A scenic byway that follows the route of the Chesapeake and Ohio Canal, a 184-mile-long canal that runs from Washington, D.C. to the Potomac River.

Antietam Campaign
 A scenic byway that follows the route of the Antietam Campaign, a major battle in the American Civil War that took place in September 1862.

Catoctin Mountain
 A scenic byway that winds through the Catoctin Mountains, offering spectacular views of the Blue Ridge Mountains and the Potomac River.

Old Mill Stream
 A scenic byway that follows the route of the Old Mill Stream, a scenic stream that winds through the Appalachian Mountains.

Marine and Dunes
 A scenic byway that follows the route of the Marine and Dunes, a scenic area that is home to some of the most beautiful beaches in Maryland.

Fair Road
 A scenic byway that follows the route of the Fair Road, a scenic road that winds through the Appalachian Mountains.

Harris and Islands
 A scenic byway that follows the route of the Harris and Islands, a scenic area that is home to some of the most beautiful islands in Maryland.

Lower Susquehanna
 A scenic byway that follows the route of the Lower Susquehanna, a scenic area that is home to some of the most beautiful scenery in Maryland.

Charles Street
 A scenic byway that follows the route of Charles Street, a scenic road that winds through the Appalachian Mountains.

National Historic Scenic
 A scenic byway that follows the route of the National Historic Scenic, a scenic area that is home to some of the most beautiful scenery in Maryland.

Star-Spangled Banner
 A scenic byway that follows the route of the Star-Spangled Banner, a scenic area that is home to some of the most beautiful scenery in Maryland.

Booth's Escape
 A scenic byway that follows the route of Booth's Escape, a scenic area that is home to some of the most beautiful scenery in Maryland.

Road and Tides
 A scenic byway that follows the route of the Road and Tides, a scenic area that is home to some of the most beautiful scenery in Maryland.

Religious Freedom
 A scenic byway that follows the route of the Religious Freedom, a scenic area that is home to some of the most beautiful scenery in Maryland.

Chesapeake Country
 A scenic byway that follows the route of the Chesapeake Country, a scenic area that is home to some of the most beautiful scenery in Maryland.

Harriet Tubman Underground Railroad
 A scenic byway that follows the route of the Harriet Tubman Underground Railroad, a scenic area that is home to some of the most beautiful scenery in Maryland.

Blue Crab
 A scenic byway that follows the route of the Blue Crab, a scenic area that is home to some of the most beautiful scenery in Maryland.

MARYLAND'S HERITAGE AREAS
 The Maryland State Department of Transportation has designated several areas as Maryland's Heritage Areas. These areas are home to some of the most beautiful scenery in Maryland and offer a unique opportunity to experience the state's rich history and culture.

TRAVEL INFORMATION

For more information on Maryland Byways, visit www.maryland.gov or call 1-800-368-3838.

Shareholder Roles

- State:
 1. Sit on Advisory Committee: SHA, MOTD, DNR/MPS, MHT
 2. Develop programmatic direction
 3. Review and rank nominations and grant apps
 4. Provide technical assistance
 5. In some cases, part of CMP process and implementation
 6. Markets the entire byway collection
- Byway Community:
 1. Planning and Project Implementation
 2. Works with jurisdictional DMO's to market byways
 3. Meets regularly with SBAC
 4. Maintains completed projects
 5. Ranks grant applications



MARYLAND BYWAYS PHASE I MARKET STUDY



Background:

2006: Maryland applied for/awarded NSB funds to conduct a multi-phased market study.



2006/7: National study completed by Longwoods International, Maryland procures Longwoods for comparison Market Study

2008: Phase I Market study results delivered

Longwoods International America's Byways Research Summary

Images and Statements included well-known iconic paths through Las Vegas and along Route 66.

Conclusion:

"Scenery should be celebrated as the backdrop or canvas onto which you bring to life the unique and exciting experience that the area has to offer, ideally accessed via a byway."



Research Phase I : Market Study similar to America's Byways Research

Six Objectives:

- Identify current awareness and perceptions of Maryland Byways
- Identify hot buttons that motivate consideration and visitation
- Identify experiences consumers want along a byway
- Obtain consumer reaction to byway product and positioning strategies
- Understand the interrelationship between overall Maryland offering and Byway offering
- Obtain insight on marketing strengths of Maryland Byways

Research: Methodology

- ① 20-25 minute online survey provided a total sample of 1,039 in March, 2008.
- ① Respondents 18 years of age and older were randomly selected to represent the population in Maryland's regional advertising markets.
- ① Surveys respondents were:
 1. Asked about travel taken in the last two years and about travel plans for the next two years.
 2. Asked about perceptions of certain activities available in Maryland and on the Maryland Byways, and what factors motivate them to travel.
 3. Introduced to images and concept statements that are currently used in marketing for Maryland Byways.
 4. Asked again, after seeing images and reading statements, about their perceptions of Maryland Byway travel and the own travel plans.





Maryland Byways Images and Concept Statements

During the survey, each respondent was asked to react to a set of three randomly selected Maryland Byways products. Maps of the Byway area was also displayed.

Historic National Road: The Road That Built The Nation (AAR)



Romanticize about life as it was centuries ago for the rugged pioneers who crossed the Appalachian Mountains heading west on the National Road, America's first federally funded highway. Conestoga wagons lugged building materials and supplies, while families rode stagecoaches and carriages, stopping frequently along the way to take advantage of friendly towns that sprouted inns, taverns, blacksmith shops and wagon yards. Today's adventurers enjoy seeing the roadway as it passes through cozy towns featuring architecture, eateries and accommodations that hearken back to the road's earliest days and feel free to experience life as it was for those first, rugged pioneers.

Catoctin Mountain NSB



Trace traditional Appalachia, from farms to sawmills to moonshine, within the scenic beauty encircling Catoctin Mountain. The forest is a natural wonder, serving as a sanctuary for wildlife and plants. Surrounding towns offer a journey through hallowed ground and a deeper exploration of the area's rich Civil War and industrial heritage. Travelers on this byway can follow two "loops" for easy access to a variety of historic sites, the state's highest waterfall, the Appalachian National Scenic Trail, horse-back riding, corn-mazes and apple orchards.

The Antietam Campaign: Lee Invades Maryland



September 1862...a country divided. Brother against brother fighting for what each believes is the American way. Beloved Confederate General Robert E. Lee and his Army of Northern Virginia boldly assert themselves as they cross the Potomac River into Maryland. Unbeknownst to them, they march toward what is now known as “the single bloodiest day in American History.” As two nations mourn their losses, President Abraham Lincoln travels to the battlefield and is inspired to set forth an “Emancipation Proclamation.” Following this byway brings you face to face with the familiar and lesser-known side of the Civil War, all while taking you through breathtaking scenery and abundant recreational, shopping and dining opportunities.

Star-Spangled Banner: War Of 1812 Chesapeake Campaign



The Star-Spangled Banner...icon of a nation and symbol of freedom. On the Star-Spangled Banner Trail, trace the “Goliath-like” British invasion of the Chesapeake during the War of 1812. This byway takes you from the charming seaside villages of Southern Maryland, complete with native cuisine and local artisans, to Baltimore, a bustling industrial port described as a “nest of pirates” by the British during the war. Take an exciting journey and meet widowed seamstress Mary Pickersgill, just trying to make a living when destiny knocks at her door. And, dashing attorney Francis Scott Key, who, “by the dawn’s early light”, captured in words a flag, a nation and a people who stood united to defeat their seemingly insurmountable enemy.

Chesapeake Country NSB



Meander along pristine waterways and past fertile farmland graced by historic manor houses. Enter small towns rich with art, culture and pure country charm, and then slip through secluded spots surrounded by unspoiled nature. You are never far from water – either the Chesapeake Bay or one of its tidewater tributaries. Chesapeake Country has shaped the lifestyles and livelihoods of generations of watermen, shipbuilders and farmers. A visit to this region will take you through waterfront communities where, for centuries, the people are up early to reap the harvest from the bay and to welcome travelers.

Harriet Tubman Underground Railroad



Fear and hope, pain and joy...these are some of the emotions of the courageous men, women and children who escaped enslavement along a secret network of trails and waterways to sanctuaries known as the Underground Railroad. Today, you can take a journey back in time and follow a path across land and water that has barely changed over the last 150 years. Stand where Harriet Tubman first found her calling and learn of the many times she risked her life to help others find the sweet breath of freedom, including the daring rescues of her parents and her brothers. The adventure continues among the many water trails where paddling a canoe or kayak provides a different perspective of the life on Maryland's Eastern Shore.

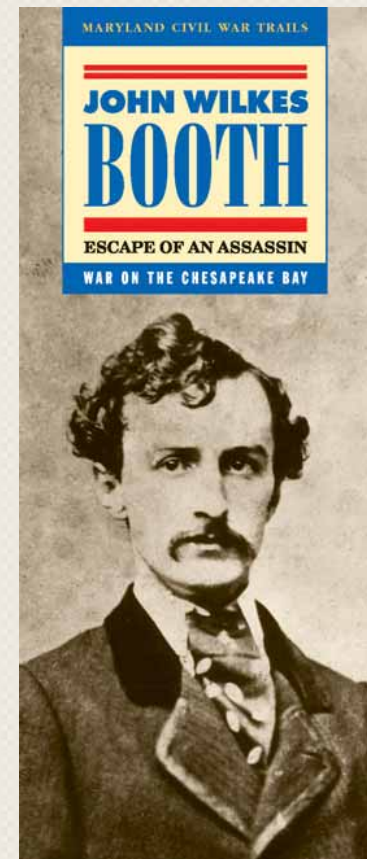
Charles Street



Travel Charles Street, Baltimore's grandest and best-known byway, on a 10-mile journey through some of the city's most fashionable cultural, residential and commercial areas. Park, stretch your legs and wander Federal Hill, the Mount Vernon Cultural district, Station North, and Charles Village to experience authentic Baltimore. Stop to shop, dine, sightsee and seek out world-class entertainment. Explore institutions – like the Peabody Conservatory, the Walters Art Museum, the Baltimore Museum of Art and Johns Hopkins University – whose influence extends beyond Baltimore's borders to the nation and the globe.

Key Findings

- Maryland enjoys a healthy image among regional residents and the product delivers on expectations.
- The Maryland Byway experience offers an appealing way to experience the state.



Traveler Interests

Turning to product and experiences, we found that the following activities were of greatest interest among Maryland travelers:

- Beaches
- Exploring costal/waterfront communities & scenic areas
- Local foods
- Historical, cultural and unique communities

The findings also suggest that the Maryland Byway experience offers an even more appealing way to experience the state's activities. Specifically, respondents who are interested in byway trips, strongly agreed byways offer:

- A great way to discover Maryland's distinct communities
- A great way to see some of Maryland's distinct treasures
- A great opportunity to learn about history and culture
- No better way to see Maryland than via a byway

Current Travel Motivators & Hot Buttons for Maryland and Maryland Byways often overlap.

	Maryland	MD Byways
Travel Motivators	<ul style="list-style-type: none"> • Atmosphere - Family/Adult • Affordable/Accessible • Exciting/Entertaining • Worry-Free • Unique • Sightseeing • Sports & Recreation 	<ul style="list-style-type: none"> • Atmosphere - Family/Adult • Affordable/Accessible • Sightseeing • Unique • Exciting/Entertaining • Worry-Free • Sports & Recreation
Hot Buttons	<ul style="list-style-type: none"> • A fun experience • Good family vacation experience • A great vacation experience for adults • Offers unique vacation experience • Offers truly beautiful scenery • Lots to see and do • Good for a longer vacation trip • Must-see destination • Interesting scenery • Unique scenery 	<ul style="list-style-type: none"> • A fun experience • A great vacation experience for adults • Great place for learning and discovery • Offers unique vacation experience • Lots to see and do • Must-see destination • A place that offers a real adventure • Offers interesting historic areas/attractions • Good family vacation experience • Interesting scenery

Measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

Categorized Motivators and Hot Button Themes for Maryland Byways

Travel Motivators	Hot Buttons
Family Inclusive Affordability/Accessibility Sightseeing Uniqueness	Learning & Discovery Adventure / Excitement Historical & Cultural Experiences

Consumer Reactions to Images and Statements

- Exposing respondents to the various Maryland Byway “Concept Statements and Images” provided key insights:
 - 10 point lift in positive “open end” responses on important image attributes. (*i.e.*, “Yes, the Byway images confirm that Byways do offer a great way to enjoy Maryland’s culture.”)
 - Overall no affect on intent to visit. (“After viewing the images and statements I am not compelled any more to visit than I was before I saw them.”)
- Longwoods experience also suggests there may be some differentiation issues between Maryland and competing states.

Longwoods' Marketing Recommendations

- The state should cultivate expressed interest in Maryland Byways as “a great way to see, discover and experience Maryland”, by:
 - Aligning messages with key Travel Motivators and Hot Buttons, and
 - Delivering message in a more exciting, expressive manner.
- Celebrate the authenticity and uniqueness of an engaging Maryland Byway experience.
- Stay consistent in what is communicated if the state is going to make the consideration list over competing products.

Other Research

- Meanwhile in Washington State...
 - Maryland receives request for bulk order of Byways guides and learns that the comprehensive Byways guide will be included in focus group studies of Byways product preferences.
 - Goal: Find out what works in three different types of travel guides from Oregon, California, and Maryland.

Washington State General Findings

Consumer Use:

- Byways guides and travel planners are used after the destination is selected.
- People don't see Byways guides and travel planners as different types of resources for different types of trips.
- In-state distribution (i.e. Welcome and Visitor Centers) is key for out-of-state visitors.
- Specific distribution targeting in-state residents.
- Internet is also primary resource for this type of information.
- Transportation and Travel offices should collaborate to create companion pieces.

Content:

- Photographs play key role. **COLORADO-way to go!**
- Family friendly emphasis is important
- Short, regional-based stories are of interest.
- Visitors do not recognize the difference between byways and other attractions.
- Use photos and short descriptions of area that compel people to explore.
- Maps are still useful – place in the front of the book or in the regional section.
- Avoid "Interest Areas" categories – Regional categories are more useful
- Advertising can be motivational and useful, especially if organized.

Washington State Findings

Focus Group reactions to Maryland Byways guide book:

Positive

- Depth of information included phone numbers, web sites, and hours of attraction.
- Informative
- Gave understanding of historical attractions
- Divided by Byways by regions - Helpful

Negative

- Copy was too long and overwhelming.
- Type size and style, and color too small and boring.
- Too much to read.
- Photos too small
- Size was awkward. "Cumbersome"
- "Dull"; "Uninspiring"
- Did not demonstrate a global perspective or how different Byways can help people see different parts of the state, from a tourism perspective.
- Consumer sensitivity to the cost of production.

Next Steps:

1. Encourage Byway marketers to use top motivating themes as they apply to each Byway in advertising

2. Phase II Research - Includes focus groups on how to prioritize and package byways and themes:

- Key selling messages
- Specific delivery method preferences

3. Use findings to re-tool the MD program and provide training for the Byway Community.

