

Market Analysis

A. The Industry

Baltimore's cultural, entertainment, and natural amenities are enjoyed by the residents in the Baltimore region as well as national and international tourists. In 2004, 11.79 million visitors from outside the Baltimore region explored the many attractions our City has to offer. In addition, 3.97 million visitors living in the Baltimore region, but outside Baltimore City, visited Baltimore. Of course, the 650,000 Baltimore City residents also enjoyed Baltimore's numerous cultural, entertainment, and natural resource amenities. These amenities provide activities for all segments of the population, from youth and families to the elderly. The following discussion focuses on the market for Baltimore's cultural, entertainment, and natural amenities, with emphasis on our customer base, market size, and trends.

Heritage and Cultural Resources

Baltimore's heritage and cultural tourism industry provides place-based, unique experiential products that range from large, world-renowned attractions and events to small, locally celebrated attractions and events. The heritage and cultural tourism industry provides products within three broad areas: visual arts, including art museums, galleries, schools, studios, architecture and architecture-related events; performing arts, including theater, art cinema, dance, and music; and historical and cultural resources, including history museums, literary events, bus and walking tours, and historic districts.¹ These resources provide life-enriching experiences that are attracting a larger number of visitors who are generally over the age of 40. Heritage and Cultural tourism is expanding its products, especially in the African American niche market. In addition, visitation to historic and culturally rich neighborhoods is increasing. Several uncontrollable factors affect the health of the heritage and cultural tourism industry. They range from local trends to global economic factors, such as financial health of individual heritage and cultural attractions, acts of terrorism and nature, and national and global economic trends.

¹ Randall Gross / Development Economics, Opportunity Audit for Cultural, Recreational, Retail, & Entertainment Amenities. Report prepared for the Baltimore Community Foundation, 2003.

Nightlife, Entertainment and Sports

The nightlife, entertainment and sports industry encompasses a broad range of businesses and activities. Business establishments range from restaurants, bars and taverns, and nightclubs to movie theaters, bowling alleys, and even roller-disco. The sports segment can be divided into the participatory and spectator categories. Participatory sports include intramural play, such as BSSC or SOBO, leagues sponsored by the City's Department of Recreation and Parks, and leagues sponsored through the public school system. Spectator sports include the City's major and minor league teams, as well as collegiate teams. This sector is critical to Baltimore's health in a number of ways – to complement the burgeoning tourism industry, to satisfy the leisure pursuits of residents, and to add to the City's jobs and tax base.

Natural Resources and Open Spaces

Baltimore's natural resource industry includes parks and open spaces, recreation centers, natural habitats such as forests, streams and estuaries. The City's parks and natural resource system includes over 6,000 acres of land on over 400 different properties ranging in size from the magnificent 700-acre forest in Leakin Park to small sub-acre lots in the inner city. Baltimore's most famous natural resource is the Inner Harbor, an international tourist destination. Baltimore's harbor and stream valleys guide the development of the City. Our parks, natural resources, stream valleys, and open spaces offer great diversity. Residents can play tennis in Druid Hill Park, hike in the forests of Cylburn Arboretum or navigate the Inner Harbor in a paddle boat. Our large parks and stream valleys feature scenic vistas that rival those of other great cities across the globe. The importance of our natural resources also extends beyond political boundaries to include water quality issues, drinking water supply and air quality.

B. Customers

Heritage and cultural resources target a customer-base that includes regional residents as well as national and international tourists. The main consumers of the City's historic and cultural attractions are:

The History Traveler is usually older, with an average age of 45, and college-educated. Approximately 15 percent of this group is retired and 45 percent have grown children. Historic Travelers take longer trips than the average traveler and are likely to stay in hotels, motels, and bed and breakfasts instead of with friends and family. These travelers tend to travel in groups, fly to their destination, and shop in addition to sightseeing. Historic Travelers are bigger spenders than other tourists, spending on average \$688 per trip (in 1997), compared with an overall average of \$577 (in 1997). Historic travelers are almost twice as likely as other tourists to spend more than \$1,000 on a trip.

The Cultural Traveler spends an average of 4.5 nights on their trips, with 36 percent visiting two or more states. In 1996, 17 percent of U.S. traveling adults visited a cultural site or festival. Six percent of the travelers cited a cultural event as having prompted their trip.

School Children and Families of Baltimore's region also include six school districts that take advantage of Baltimore's heritage and cultural attractions. These school districts provide Baltimore's heritage and cultural attractions with fall, winter, and springtime customers. Area private and parochial schools also utilize Baltimore's cultural resources in their educational programs. Additionally, families within the region also bring children to cultural and historic attractions, both to expose them to special children's programming and to enrich their cultural learning.

Local Visitors are typically highly educated, usually in their forties or older, and many have high levels of disposable income. They are usually members of one or more cultural or heritage institution. Due to their high incomes, this group also supports cultural and heritage institutions in a substantial but indirect manner through the payment of income and property taxes. Most local visitors live in Baltimore City or in the older neighborhoods in the surrounding counties. They are the regular customers of Baltimore's heritage and cultural attractions, and are frequently the advocates for culture and heritage in Baltimore.

The nightlife, entertainment, and sports sectors appeal to many groups within the overall population. This can be attributed in part to the extended hours of operation. Generally speaking, those most likely to take advantage of nightlife and entertainment include college students, childless young professionals, tourists and business travelers. Sports are likely to be enjoyed by the same groups, and by children and families. Also, sports enthusiasts tend to be skewed more toward males. The consumers of nightlife, entertainment, and sports are:

College Students

The college student population in Baltimore has not decreased at the same rate as the general population has decreased. Census figures indicate that in the year 2000, there were 48,736 individuals in Baltimore City enrolled in college, graduate, or professional schools. This is very close to the 50,325 enrolled in 1990. Additionally, there are 32,500 college students at four year colleges in Baltimore County. Many of these students were attracted to these institutions based on the entertainment amenities a large city offers.

Childless Young Professionals

The number of childless young professionals has grown in the City, a demographic trend that is echoed in many of the nation's urban centers. Attracting

² Source: DK Shifflet & Associates, Ltd.

and retaining these individuals could lay the foundation for the City's future economic health.

Tourist and Business Travelers

Baltimore remains the dominant tourist destination in Maryland and is growing in popularity within the broader region, and in the nation as a whole. According to a 2004 study of tourism in Baltimore, that year saw a total of 11.79 million visitors, with the predominance of trips made for leisure rather than business. Top of origin for states visitors include Pennsylvania (17%), New York (15%), New Jersey (10%), Virginia (9%), California (9%), Maryland (6%), North Carolina (5%), and Florida (4%). The top reasons for visiting include family or friends, special events, general weekend trips, and general vacation trips. Top activities that people pursue include dining, sightseeing, entertainment, and shopping. The number of day-trippers versus overnighters indicates that the City should be doing more to entice people to make longer visits.

Children and Families

In general, the number of households with children in Baltimore continues to decline. For the year 2000, there were 67,338 two or more person households with children under the age of 18. This represents a decline from 78,366 in 1990. With special regard to spectator sports, this is a group that will come to Baltimore events from a broader area.

The customers for Baltimore's parks and open spaces are primarily residents of the City and the surrounding region. Unique parks and opens spaces within the City attract tourists as well. These unique resources include the Gwynns Falls and Jones Falls Trail systems, Cylburn Arboretum, the Maryland Zoo, and Baltimore's Inner Harbor park system. The Department of Recreation and Parks has developed a detailed report of the park system's customer base in the City's Land Preservation and Recreation Plan. The main consumers of the City's natural resources and open spaces are:

Youth and Families

The Baltimore population of youth 18 years and younger is distributed fairly evenly throughout the City. Parks, schoolyard parks and recreation centers are also distributed evenly. The number of schools and recreation centers is greater in high-density, low-income neighborhoods to meet the needs of "at risk" youth.

Young Professionals

One of the largest groups of people moving into the City is young professionals. Young professionals value active recreation such as sports, running and biking. In addition, they value festivals and other forms of park-based entertainment such as concerts.

Seniors

The current population 65 years and older is widely distributed among the City's neighborhoods. The number and percentage of older residents in the City of Baltimore is expected to increase in the next two decades as baby boomers age, resulting in an increased demand for park services by this group. Also, retirees and empty nesters are one of the largest groups of individuals relocating into the City.

Environmental and Community Stewardship Groups

These groups are protectors of the City’s system of parks and open space. These groups promote our natural resources through continued commitment to community education and stewardship.

Tourists

Baltimore has not effectively capitalized on tourism opportunities within our parks system. It has always been difficult to get tourists to leave the Inner Harbor area and explore the surrounding City neighborhoods. It is hoped that the completion of the Greenway Trail systems and the creation of tour buses, such as the new “Big Red Bus” will create venues for tourists to leave the Harbor and explore other attractions in our parks.

C. Market Size and Trends

In 2004, a total of 11.79 million customers visited Baltimore and cumulatively spent \$2.8 billion. The tourism industry has become the third largest employer in the City. The Baltimore Area Convention and Visitor’s Association defines a visitor as either a business traveler or a leisure traveler. These two categories are further defined as overnight or daytrip visitors.

According to BACVA, the travel & tourism industry defines a visitor as someone who travels from outside a 50-mile radius of the city center. The Visitor Volume Study was developed for BACVA by D.K. Shifflet & Associates, an industry expert who does similar work for a variety of destinations and states nationwide. They are now the resource for the Travel Industry Association of America as well. In 2004, we welcomed 11.79 million visitors from more than 50-miles outside of the Baltimore city center.

Segments Tracked	Business Travelers	3.92 million visitors in 2004
	Leisure Travelers	7.88 million visitors in 2004
Broken out by:	Overnight Business	1.64 million visitors in 2004
	Daytrip	7.92 million visitors in 2004

Since a good portion of the Washington, DC market falls within the 50-mile radius, BACVA began a separate tracking study to look at travel originating within the 50 mile radius and at least 20 miles from the Baltimore City center, thus eliminating areas that would clearly contain Baltimore residents. Therefore, we consider the “local” market to be within 20 miles of downtown Baltimore. In 2004, there were 3.97 million visitors from 20 to 50 miles of downtown.

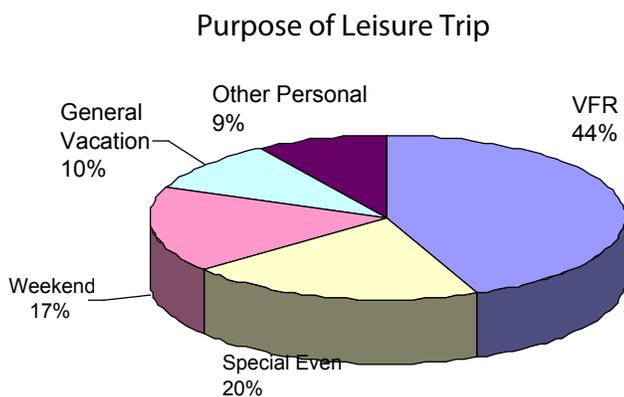


Figure 1 Source: DK Shifflet & Associates, Ltd. 2004
(VFR refers to visiting friends and relatives)

Specific trends are not as easy to glean for the nightlife, entertainment, and sports market segment. This is an industry that is subject to changes in market conditions, as it relies heavily on people’s discretionary incomes. It is also subject to demographic trends because new businesses will arise to meet the demand of growing populations. Lastly, it is subject to overall trends in the tourism industry in Baltimore.

The market for Baltimore's park and open space system is difficult to define. There is a wide variation in the types of parks and open spaces offered and multitudes of possible uses within the parks and open space system. No recent, quantifiable data has been collected by the City to identify the quantities and types of users within the parks. While some parks, or park facilities, appear to receive a great deal of use, many others appear to be virtually empty. Overall, it is difficult to define whether our parks and recreational areas are receiving adequate usage. Data is needed to clearly identify existing park and recreation user patterns. The data should be combined with City census data to develop a clear picture of our market for our parks and open space system.

D. Location

Heritage and cultural attractions are located throughout Baltimore City, with many concentrated in the Baltimore City Heritage Area (BHCA). The BHCA features a rich variety of historic sites and cultural experiences. Baltimore's heritage and cultural attractions are convenient to highway, rail and air service. In addition, Baltimore is part of the Washington, DC metropolitan area and can attract visitors based upon that proximity. The growing recognition of the Baltimore City Heritage Area, and its related trail system, will dramatically increase visitation within the next five years.

Throughout the City there are a number of nightlife, arts and entertainment "districts" that include: the Inner Harbor, the Stadium Area, Fells Point, Canton, Federal Hill, Mount Vernon, Station North, Belvedere Square, 36th Street, West Side, The Block, Little Italy, and Pennsylvania Avenue. Most entertainment areas enjoy public transit access, particularly the large sports venues which are linked regionally through the light rail system.

Baltimore's largest park and open space systems are distributed throughout the City. There are also many neighborhood parks, public fields, and recreation areas on school properties. Baltimore's college campuses also function as informal open space areas for surrounding neighborhoods.

E. Competition

Baltimore's heritage and cultural tourism industry struggles from a market standpoint because it is nestled in the midst of three first-tier competitors: New York City, Philadelphia, and Washington, DC. Each of these competitors aggressively markets to the same visitor-base that Baltimore seeks to attract. In addition, their marketing campaigns are funded with profoundly greater resources.

The key competitors for tourism visits originating within the Baltimore region are the Eastern Shore and beach attractions, Atlantic City, Washington, DC, and Annapolis.

Competition for nightlife, entertainment, and sports comes from a number of sources, most typically, the Washington, DC area. This is because people are not willing to travel too far for a dining or entertainment experience not involving an overnight stay. Baltimore enjoys little competition for spectator sports within the Baltimore region. However, Baltimore does compete for its share of the sports dollar with the Washington, DC area and Annapolis.

Baltimore's competition for parks and natural resources is not with the first-tier northeastern cities as identified above for heritage and cultural resources. Baltimore's competition for parks and natural resources is with other local

activities available to our citizens. The City's recreation resources have serious competition from leagues and associations originating in surrounding counties. The City must maintain parks in a clean and safe manner to assure that they are utilized and adopted by the surrounding populace. Baltimore has an excellent natural resource and park system base with which to work. Our natural resources and parks are available to both our local population and regional and national tourists. The best example of capitalizing on unique natural resources for tourism within the City is the revitalization of the Inner Harbor. Our Harbor has advantages over cities with similar waterfronts because our Harbor is enclosed and allows for more unique views and connectivity around the water's edge. Our parks and stream valley system also offer similar opportunities that have not been fully capitalized upon. The Greenway Trail systems are a good first step in this direction.



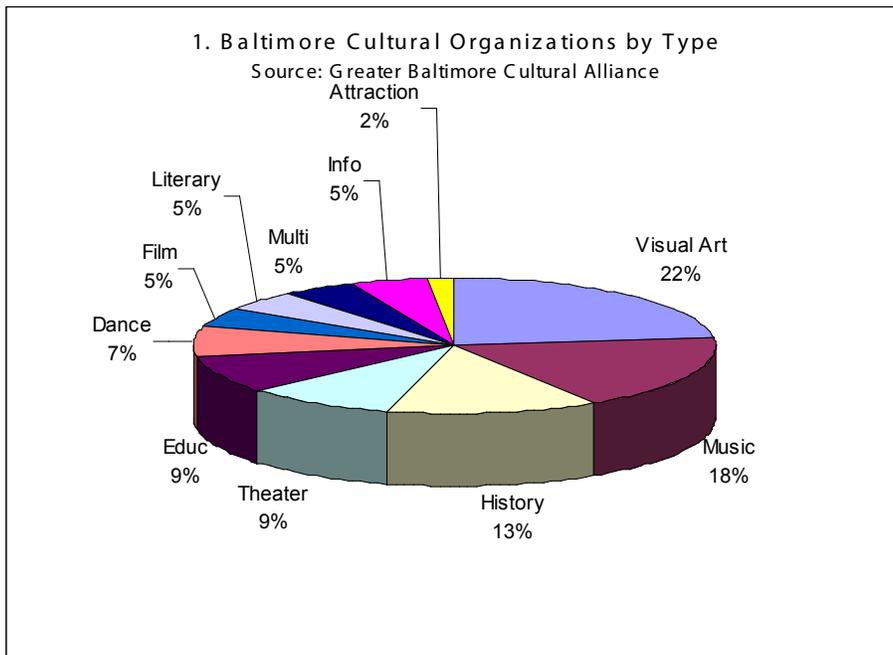
PLAY

Products and Services

Successful cities offer high quality, life-enhancing environments. Cities understand that strengthening and diversifying heritage and cultural amenities, entertainment, and natural resources are critical to improving the City’s vitality. These amenities play a critical role in lowering the “barrier to entry” for newcomers, especially where these amenities intersect to create a unique sense

of place. Baltimore offers an unparalleled variety of authentic visitor experiences that are the foundation of its success as a city. Every Baltimore resident and visitor participates in Baltimore’s heritage, cultural, entertainment, and natural resource amenities in one form or another. From watching a football game at a corner pub, shopping on a main street, or attending an opening at the Baltimore Museum of Art, opportunities abound for everyone.

There are more than 200 cultural and heritage organizations in Baltimore. More than half of these organizations fall into the categories of visual art, music, historical and cultural heritage, and theater and dance.



Visual Arts

There are approximately 54 visual arts organizations in Baltimore. These organizations include museums, galleries, artist studios, community arts/resource centers, associations, graphic design and architectural firms, commercial art dealers, colleges, art exhibits, and shows. Many of these venues are nationally and internationally recognized such as the Walters Art Museum, the Baltimore Museum of Art and the Visionary Arts Museum. In addition, Baltimore houses one of the most prestigious art schools in the country, the Maryland Institute

College of Art (MICA). Overall, Baltimore’s visual arts are thriving and in many ways inspiring revitalization of whole neighborhoods like the Charles North Arts District.

Music

Baltimore’s music scene, too, is nationally recognized. Baltimore’s leading classical music venues are the world-renowned Peabody Institute, Baltimore Symphony Orchestra and the Opera Company. In addition, there are at least eleven other classical music organizations in the City, including the Baltimore Chamber Orchestra, Baltimore Choral Arts Society and the Hopkins Symphony Orchestra. The Eubie Blake Institute is preserving and perpetuating Baltimore’s love for Jazz. The Institute celebrates Baltimore’s jazz greats such as Eubie Blake, Cab Calloway, Chick Webb, Billie Holiday, Dennis Chambers, Carl Filipiak, and Gary Bartz. There are several additional organizations that support live jazz in Baltimore, including the Baltimore Chamber Jazz Society and Peabody Institute. Business establishments such as Berthas, New Haven Lounge, Sascha’s and An die Musik regularly hold live performances.

History and Culture

Baltimore’s rich historical and cultural heritage defines the City as a world renowned tourist destination. Baltimore’s historical and cultural attractions range from over seventy historic districts to nationally recognized history museums: Mt. Vernon Place, a National Historic Landmark District; the B&O Railroad Museum; USS Constellation; Edgar Allan Poe house museum; Mount Clare Mansion; the Maryland Historical Society; Reginald L. Lewis African American Museum; and many others. Other organizations hold lectures, conferences, walking tours, and other events. In addition, many walking and driving trails are being created that will have signage interpreting Baltimore history and culture.

Theater/Dance

Baltimore has several large live theater venues as well as many small theater venues and companies. Baltimore’s theater options range from several small theater companies to large traveling shows at the Hippodrome, Lyric and Meyerhoff. Additionally, the area’s colleges and universities stage theatre and dance productions as well as performances by traveling companies.

Nightlife, Entertainment and Sports

Baltimore has an active nightlife. From casual dining to luxurious gourmet restaurants, Baltimore has more than three hundred restaurants that can satisfy anyone’s culinary delights. There are at least a dozen nightlife and entertainment “districts” throughout the City. Additionally, it is important to note that many of these districts serve as local shopping destinations as well. Much of the City’s shopping, dining, and entertainment can be found in centrally-managed centers and mixed-use complexes, or in neighborhood commercial districts. Several of these commercial districts have strong identities and are marketed by an organized business association.

Sports facilities are concentrated close to downtown, making patronage of other entertainment experiences possible. There are local social leagues, recreational centers, and other facilities scattered throughout the City, providing local communities with opportunities to participate in a wide variety of activities.

Some of the major products and services provided for Baltimore City customers in nightlife, entertainment, and sports include:

- Individually operated bars & nightclubs – Baltimore has an abundance of bars and nightclubs that contribute to the City’s highly individual character, often featuring local and national entertainment.
- Nightclub entertainment complexes – Power Plant Live! is managed as a nightclub complex. In addition, Fells Point, Canton, and Federal Hill business districts belong in this category because the sheer number of businesses locating in close proximity creates a highly trafficked area with a party atmosphere.
- Large concert venues—These include the Pier Six Pavilion, Ram’s Head Live and other facilities that are larger in size than the typical nightclub.
- Chain entertainment – This category includes places such as the ESPN Zone or Hard Rock Café. These are geared more toward tourists and visitors who are in the City for sporting events, conventions and concerts.
- Formal dining – Baltimore has several upscale restaurants ranging from traditional to contemporary, most of them located near the Inner Harbor or the City’s numerous cultural institutions.
- Casual dining – These restaurants have been especially attractive to tourists as innovative new restaurants have helped raise the City’s dining profile.
- Professional sports venues – Includes M&T Bank Stadium, Oriole Park at Camden Yards, 1st Mariner Arena, and Pimlico Racecourse.
- Recreation centers – The City has 45 of recreation centers in the Recreation & Parks system, including facilities attached to schools.
- Other recreational facilities include venues such as DuBurns Arena, Meyers Pavilion, YMCA locations, golf courses and marinas.

Natural Resources

Baltimore also provides great opportunities for leading an active lifestyle. From a leisurely stroll along one of the City’s many trailways, streams and waterfront promenades to a game of touch football in a local park, there are many activities from which to choose. Baltimore offers all of these recreation opportunities even though the City’s 87 square miles of land are more developed than any other comparable region in the State. The City has preserved some important areas that add value to the environment of the City. Aside from their recreation benefits, parks and natural lands function to moderate the climatic conditions in the City. The trees, fields and natural stream valleys offer an aesthetic alternative to a continuous landscape of roads and buildings. These areas also provide habitat for many species of animals and plants, including migratory woodland birds and waterfowl.

B. Competitive Advantage

Culture isn’t just about organizations and institutions; it is about what makes Baltimore undeniably Baltimore. Baltimore is a unique place because of its physical character, neighborhoods, institutions, and history. Baltimore enjoys

its own, unique dialect, with several distinctive pronunciations and catch phrases. The Chesapeake Bay and the seafood it yields contribute to local culinary identity. Baltimore, too, is celebrated through a large list of icons and celebrities. These icons and celebrities define Baltimore, ranging from built trademarks such as the Washington Monument, rowhouses, formstone and marble steps to Historic sites commemorating local figures such as H.L. Mencken, Thurgood Marshall, Billie Holliday and Babe Ruth to the presence of contemporary popular figures such as Cal Ripken and John Waters. This wealth of local trademarks and “only here” cultural goods makes Baltimore a place with a distinct, strong local identity.

While offering the full range of nightlife, entertainment, and sports products one would expect from a large city, Baltimore has its own unique character that can attract visitors on its own merits and enhance the experience of people who are visiting for other reasons. Among the many products that are uniquely Baltimore are such things as rowhouse bars, crab houses, lacrosse games, public markets, snowballs and other features that make the City unique and enjoyable for visitors.

Baltimore’s nightlife, entertainment, and sports products also have the advantage of being reasonably priced. The low cost of many products in this category are often able to keep local dollars in the area and attract visitors who are looking for an affordable alternative to comparable areas elsewhere on the East Coast.

Baltimore’s parks and open spaces offer more distinct identities and amenities than many similar properties in surrounding areas. Some outstanding examples of historic park buildings include Clifton Mansion, Mount Clare, Druid Hill Conservatory, Taylor’s Chapel, Cylburn Mansion, Clifton Park Valve House, Patterson Park Casino, the Maryland Building, and numerous other monuments and park pavilions. Because of these historic structures, the City parks have a built-in advantage over the more strictly functional parks in neighboring jurisdictions.

C. Customer Perceptions

Residents and visitors perceive many factors when deciding to visit and live in Baltimore. A combination of convenience, cost, services, proximity to other venues, and safety all play a role in one’s decision to **PLAY** in the City.

For heritage and cultural resources, most of the attractions have admission fees ranging from the nominal to over ten dollars. These prices are usually reasonable but can be surprising to tourists that may have recently been to free museums in the Washington, DC area. Performing arts tickets can be considerably more expensive, but are generally cheaper than those found in other northeastern cities.

Convenience is a factor that can be both an asset and liability for Baltimore area cultural and historic resources. While there is a strong concentration of cultural attractions in the area beginning with Federal Hill heading northwards towards Station North along Charles Street, many of the attractions outside of this area are not readily accessible by walking or public transportation and may appear to be hard to access by the visitor without a car.

In the area of nightlife, entertainment, and sports, customers’ choices are determined by the safety of the location, the quality of the service as well as convenience. Many of the entertainment options are located in the downtown area, which is well populated during the day. However, the downtown area’s business focus can mean areas not near the harbor seem dead at night, discouraging

pedestrian exploration of the areas around the entertainment attractions. The sense of pedestrian safety and interconnectedness of nightlife and entertainment activities needs to be improved to strengthen the nightlife and entertainment performance of downtown as a whole.

Access to nightlife spots away from the Inner Harbor area has not been developed as much as it could be. Tourists may not yet have awareness of how many of the City's nightlife and entertainment areas are located in close proximity to one another. The links between the Inner Harbor and nearby areas have not been developed to the fullest. These links could be better developed through enhanced signage, tourist maps, shuttle routes and better publicity of the broader area surrounding Downtown and the many amenities offered nearby.

The City's parks often score highly in terms of convenience due to their proximity to large population centers within the City. Certain parks should be upgraded in order to improve safety, both real and perceived. With safety upgrades, the status of the City's parks would be improved, leading to stronger participation in friends groups and utilization of rentable park facilities. Deferred maintenance of buildings and ball fields also needs to be addressed to improve the usage and prestige of the parks.

D. Comparative Analysis

Baltimore City's heritage and cultural, entertainment, and natural resource amenity base is strong and growing. In 2004, the Baltimore region hosted 15.76 million visitors, including nearly 4 million day trippers from Washington, DC. Visitors generated an estimated \$3 billion in direct spending, and Baltimore was ranked one of Frommer's top 10 Summer destinations in 2005. In addition, the City has its own authentic culture that helps to create a sense of place. The City is home to nationally recognized cultural resources, entertainment, and visitor attractions.

Baltimore offers a neighborhood orientation with deeper roots to its local heritage than can be found in nearby Washington, DC, which has a weaker local identity due to the predominance of a transplant population in both the district and its suburbs. Compared to both Philadelphia and Washington, DC, Baltimore nightlife, dining, sports and entertainment activities are often considerably more affordable. Despite the lower prices, Baltimore has several nightlife spots and restaurants that have attracted positive reviews from out-of-town publications, proving that low priced entertainment does not necessarily imply second-rate.

Heritage and cultural resources in the City are distinguished by their local orientation, as opposed to the national orientation that is seen in Washington, DC. However, since Baltimore resources are not part of the Smithsonian Institution, admission is not free. This may have the effect of discouraging museum visits from travelers visiting from the Capital region.

Baltimore's parks and open spaces are distinctive in comparison to those in neighboring jurisdictions. The City's parks are unique; there are historic features, architecture and history, and natural resources found only in Baltimore such as the Inner Harbor. In many cases the classic design of the parks themselves is distinct from suburban counterparts.

As Baltimore continues to be an important cultural hub, there is more that can be done to maximize the potential for cultural amenities and attract visitors to the City.



PLAY

Goals, Objectives and Strategies

Baltimore is the region's cultural, entertainment and leisure center, as well as a world-renowned tourist destination. The City provides a wide array of leisure and social activities for tourists and citizens alike, many of which are in close proximity to jobs, neighborhoods, schools and transportation. There are, however, several areas to improve upon in order to provide more fulfilling recreational experiences for the visitor and resident. The following three goals will guide efforts to maximize the City's potential as a premiere place to **PLAY**:

Goal 1: Enhance the Enjoyment, Appreciation, and Stewardship of Baltimore's Heritage and Cultural Resources

Goal 2: Improve Night Life, Entertainment, and Recreation Experiences for Residents and Visitors

Goal 3: Increase the Attractiveness of Baltimore's Natural Resources and Open Spaces

The objectives and strategies that follow are designed to provide a blueprint to City agencies and officials as they implement this plan. **PLAY's** recommendations, in addition to enhancing the leisure experience, will strengthen Baltimore's attractiveness as a place to live, work and learn. **PLAY's** goals, objectives and strategies complement those of **LIVE, EARN** and **LEARN**.



PLAY

Goal 1: Enhance the Enjoyment, Appreciation, and Stewardship of Baltimore's Heritage and Cultural Resources.

Objective 1: Market, Develop, and Promote Visitor Attractions in Baltimore City

- Market and promote the City through increased funding for BACVA and BCHA
- Develop new visitor centers and enhance existing visitor centers
- Complete pedestrian and automobile-oriented wayfinding system to help visitors navigate Baltimore's Heritage Area attractions
- Form a task force to establish Baltimore as a National Heritage Area and prepare for the anniversary of the War of 1812

Objective 2: Increase Everyday Heritage and Cultural Encounters for Baltimore City Residents

- Implement Heritage trails in historic areas of the City
- Teach American History using Baltimore's history museums, establishing links to the City's public and private school curriculums
- Provide infrastructure improvements to festival space throughout the City

Objective 3: Enhance Accessibility to Heritage and Cultural Resources through Transportation Improvements

- Develop plans for and implement Charles Street Trolley Line
- Implement Charles Street Byway Plan

Objective 4: Strengthen Stewardship of Heritage and Cultural Resources.

- Expand "Authentic Baltimore" program and link to Baltimore City Historic landmark program
- Complete inventory of city-owned cultural heritage sites and attractions for which management agreements exist and enter into new management agreements with partner organizations for high-priority properties
- Implement a feasibility study to enhance and reuse under-utilized historic structures

Objective 5: Establish Baltimore City as the Region’s Center of Culture and Entertainment

- Establish regional policy to increase regional funding resources for cultural activities within Baltimore City

Goal 2: Improve Night Life, Entertainment, and Recreation Experiences for Residents and Visitors

Objective 1: Expand Access to Live Entertainment

- Create mixed-use zoning categories that allow live entertainment where appropriate

Objective 2: Promote Unique Retail Venues as Shopping and Tourist Destinations

- Reinstate the “Shuttle Bug” system along main streets and shopping districts within the City.
- Designate Main Street areas as local and/or national historic districts in order to access tax credits
- Increase retail space in downtown by 400,000 sq. ft. to one million sq. ft.

Objective 3: Improve Local Participation in City Recreational Activities

- Develop a strategic recreational plan that will target recreational opportunities to address the City’s needs
- Implement the Bicycle Master Plan to provide recreational opportunities for residents

Goal 3: Increase the Attractiveness of Baltimore’s Natural Resources and Open Spaces

Objective 1: Maintain a Well-managed System of Parks & Open Spaces

- Locate dedicated, sustainable funding sources for our parks and cultural assets
- Create park and open space zone in the Zoning Ordinance
- Improve park stewardship and safety by expanding current parks partnership program

Objective 2: Protect and Enhance Baltimore’s Natural Habitat and Environmental Resources

- Install 10 trash interceptors at storm drain outfalls over three years.
- Develop a plan to reduce trash within and along Baltimore’s parks and open space (See LIVE, GOAL 1, OBJECTIVE 2, STRATEGY 3)
- Restore and protect all floodplains and stream valleys
- Complete plans for and creation of Greenway trail system
- Increase Baltimore’s green infrastructure by increasing the number of trees and tree canopy size (See LIVE, GOAL 1, Objective 2, Strategy 2)

Objective 3: Ensure Public Access to the Waterfront

- Complete the Harbor Promenade and Middle Branch park/trail systems

Goal I: Enhance the Enjoyment, Appreciation, and Stewardship of Baltimore's Heritage and Cultural Resources.

Objective I: Market, Develop and Promote Visitor Attractions in Baltimore City

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Market and promote the City through increased funding for BACVA and BCHA			•	Increased number of attendees at local attractions.	BACVA, BCHA	Years 1-6	Increase BACVA's share of Occupancy Tax by 20%. Increase BCHA funding through general funds	More tourist dollars Positive perception of Baltimore

Several recent reports conclude that BACVA is severely outspent by its competitors from a leisure marketing perspective. In order for Baltimore City to become a first-tier market, BACVA must be adequately funded to launch market campaigns in first-tier feeder markets. Additionally, BACVA estimates that African American Heritage tourists make up a \$90 billion travel market. Baltimore City heritage tourism is poised to capture a significantly greater portion of this market by developing and promoting the rich African American history in Baltimore.

Develop new visitor centers and enhance existing visitor centers	•		•	Increased number of visitor centers, increased use of centers,	Baltimore City Heritage Area, Department of Planning, BACVA, BDC	Years 1-6	GO Bond, general funds, hotel tax	Greater awareness and increased spending by tourists in a broader area, longer visitor stays
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Visitors Centers are an essential component to Baltimore's Tourism. Between July of 2004 and June of 2005, 382,404 visitors stopped into the Inner Harbor Visitor Center. This number exceeded expectations. Developing an integrated system of visitor centers throughout Baltimore's prime tourism areas would provide a more coherent tourism experience.

Complete pedestrian and automobile-oriented wayfinding system to help visitors navigate Baltimore's Heritage Area attractions.	•		•	Implemented wayfinding system	BCHA, Planning, DPW, Dept. of Transportation.	Years 1-6	MVR, GO bonds, General Funds	Increased tourism in areas beyond the Inner Harbor
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A systematic, fully developed way finding system for pedestrians as well as automobile users will help visitors navigate the City and explore a wide range of areas and attractions.

Form a task force to establish Baltimore as a National Heritage Area and prepare for the anniversary of the War of 1812			•	Formation of task force Awarding of National Heritage Area Designation	BCHA, BACVA, Planning, DPW, Dept. of Transportation, BOPA, Recreation and Parks, tourism industry	Years 1-2	General funds	Increased prominence of Baltimore tourism
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During the War of 1812, Baltimore saved the United States from imminent defeat. This legacy is celebrated at the Fort McHenry National Monument and Historic Shrine. The Bicentennial celebration of the War of 1812, especially the Battle of Baltimore, will be a national celebration and Baltimore should take the lead. A task force of Baltimore City agency heads must be formed to guide the three-year-long celebration of the War of 1812. The BCHA should manage this task force, hire consultants and provide the initial celebration planning. In addition, BCHA is completing a feasibility study for Baltimore to pursue National Heritage Area designation. Agency heads throughout city government must become engaged in this feasibility study in order for the City to obtain National Heritage area status.

Objective 2: Increase Everyday Heritage and Cultural Encounters for Baltimore City Residents

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Implement Heritage trails in historic areas of the city	•		•	Trails are completed and are part of the City trail system. Increased use of trails	BCHA, BACVA, CHAP	Years 1-6	GO Bonds- General Funds	More tourist dollars, and-greater awareness of Baltimore beyond the Inner harbor.

Heritage trails are designed for guided walking tours and self-guided tours that lead visitors from the Inner Harbor to surrounding historic neighborhoods. These trails highlight the heritage and culture of Baltimore and lead tourists to shops, restaurants, museums and other historic attractions that are located beyond the Inner Harbor.

Teach American History using Baltimore's history museums, establishing links to the City's public and private school curriculums			•	Increased visitation to City museums by City school children. Created specific line item for bus trips to attractions	BCHA, Greater Baltimore History Alliance, and BC public and private Schools, BOPA	Years 1-6	General Funds	Appreciation of Baltimore City heritage and culture by children and future adults
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City school students currently cannot attend Baltimore's heritage and cultural attractions because of insufficient transportation funds. Earmarked funding would enable students to go on field trips to heritage and cultural attractions. The suggested funding would provide each student the opportunity to take approximately three field trips per year. A strengthened relationship between BCPSS and the Baltimore City Heritage Alliance will also enhance stewardship and curriculum development at Baltimore's heritage and cultural attractions.

Provide infrastructure improvements to festival space throughout the City	•		•	Increased visitation to heritage and cultural attractions by city residents.	BOPA, Recreation & Parks	Years 2-3	Private sponsor (corporate sponsorship) General Funds (BOPA) Rec & Parks sustainable funding	Increased appeal of festivals
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Baltimore's tourism industry in partnership with Baltimore City agencies should plan multiple activities and events that directly benefit Baltimore residents. These attractions and events may include 'Be a Tourist in Your Own City Day,' the New City Fair, discount weekends at the Inner Harbor attractions, local restaurants, museums, etc. Festival space needs to be improved to become more hospitable to the visitors the City intends to attract.

Objective 3: Enhance Accessibility to Heritage and Cultural Resources through Transportation Improvements.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Develop plans for and implement Charles Street Trolley Line	•		•	Increased number of tourist visitations outside of Inner Harbor	Planning and Department of Transportation	Years 1-6	Federal DOT, MVR, GO Bond	Connection of attractions along Charles

Charles Street Byway runs from the southern tip of South Baltimore to Lutherville in Baltimore County. Charles Street exhibits hundreds of historic, architectural and cultural treasures. This scenic byway will provide visual and physical links between the Inner Harbor and nearby neighborhoods to neighborhoods throughout northern Baltimore. This linkage further promotes regionalism and economic development.

Objective 4: Strengthen Stewardship of Heritage and Cultural Resources.

Expand “Authentic Baltimore” program and link to Baltimore City Historic landmark program	•		•	Increased number of participating organizations and City historic Landmarks	BCHA, CHAP	Years 1-6	General Funds	More tourist dollars Positive perception of Baltimore
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The Baltimore City Landmark Program can provide *authentic*, well-documented history of historic properties. Landmark reports may serve as the basis for the historical information needed in the Authentic Baltimore application.

Complete inventory of city-owned cultural heritage sites and attractions for which management agreements exist and enter into new management agreements with partner organizations for high-priority properties	•		•	Decreased number of vacant, City-owned structures in Baltimore	BCHA, Planning, Rec & Parks, HCD, MOIT	Database: Years 1-2 Management Plan: Years 2-6	GO Bonds, General Funds, Private sponsorship	Improved stewardship of city-owned historic properties
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The City owns very prominent historic structures (e.g. Peale, Mencken, PS 103) that need to be inventoried and better managed. By creating a database and management plan, the City will be better able to maintain and maximize the use of these properties.

Implement a feasibility study to enhance and reuse under-utilized historic structures	•	•	•	Increased number of well-maintained historic buildings	DPW, Mayor's Office, Planning, BCPSS, HCD, BCHA, Rec & Parks	Years 1-6	General funds, GO Bonds, General Funds, state grants	1-Increased number of taxable properties. 2-Positive perception of Baltimore City
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Many of Baltimore’s historic structures are owned by Baltimore City; many of these structures are vacant or underutilized. The use of these structures can increase the number of taxable properties, add commercial and civic activities to communities, and enhance the maintenance and stewardship of these properties. New zoning categories may need to be created to facilitate reuse.

Objective 5: Establish Baltimore City as the Region's Center of Culture and Entertainment

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Establish regional policy to increase regional funding resources for cultural activities within Baltimore City			•	Increased funding by county jurisdictions for Baltimore City's historic and cultural attractions	Greater Baltimore Cultural Alliance, BCHA, Baltimore city and regional county governments.	Years 1-6	General Funds	Greater funding for heritage and cultural attractions

Increased regional funding will provide better stewardship of Baltimore City's regional heritage and cultural attractions. Partnerships with the surrounding county governments will enhance revenue and State support for local attractions. Regional cooperation will be to everyone's benefit.

Goal 2: Improve Night Life, Entertainment, and Recreation Experiences for Residents and Visitors

Objective 1: Expand Access to Live Entertainment

Create Mixed-use zoning categories that allow live entertainment where appropriate		•		Decreased number of variances and URPs for mixed-use, and increased live entertainment in appropriate mixed-use zones	Planning/BMZA/HCD/Law/ Mayor and City Council	Years 2-4	General Funds	Increased tax base and density
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Develop mixed-use zoning categories that include live entertainment. Use the work of the Night-Life Task Force and definitions added to the Zoning Code in 2004 to develop coherent categories for all restaurant and entertainment uses.

Objective 2: Promote Unique Retail Venues as Shopping and Tourist Destinations.

Reinstate the "Shuttle Bug" system along main streets and shopping districts within the City	•			Ridership; Increased retail sales receipts	MTA; DOT, Planning, BDC, Downtown Partnership	Years 1-3	Federal DOT, State, General Funds	Greater accessibility to retail
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A shopping shuttle could provide direct connections around residential neighborhoods and shopping hubs. These could operate in the evening hours, on weekends, and for extended hours during holiday periods. Funding for this service would be a joint effort with the City paying one-third of the cost and the State paying two-thirds of the cost.

Designate Main Street areas as local and/or national historic districts in order to access tax credits			•	Increased number of designated Main Streets. Lower rehabilitation costs	BDC, Planning	Years 1-6	General funds	Sales tax collected; greater occupancy in commercial districts
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Baltimore offers specialty retail unique to the local, if not, regional market. In particular, some businesses carry products that are not available at other places in the East Coast. Much of the City's shopping, dining, and entertainment can be found in centrally-managed centers and mixed-use complexes, or in neighborhood commercial districts. As the City continues to grow, supporting the creation and expansion of local businesses and retail venues will provide an opportunity for enhancing the City's overall quality of life.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Increase retail space downtown by 400,000 sq.ft. to 1 million sq. ft.			•	Increased retail square footage downtown	MTA; DOT, Planning, BDC, Downtown Partnership	Years 1-3	General Funds	Greater accessibility to retail

According to the Downtown Retail Study, the downtown area now has a substantial residential population that can sustain a viable retail market within a 1-mile radius of the intersection of Pratt & Light Streets.

Objective 3: Improve Local Participation in City Recreational Activities

Develop a strategic recreational plan that will target recreational opportunities to address the City's needs	•		•	Increased participation in recreational programs	Rec & Parks, Planning, Community Organizations	Year 2	Service/Use Fee, General Funds	Recreation programs that improve lives of City residents by providing resources and opportunities they desire
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Baltimore's residents vary in age, income levels, and in the neighborhoods in which they live. Recreational services that the City provides should creatively reflect the needs of the unique and diverse populations within the City. Currently, many City residents go to neighboring jurisdictions for recreational programs not offered in the City, and many County residents are heavy users of facilities such as the Du Burns and Myers Arenas. Baltimore needs to review the recreational models of other jurisdictions, such as Baltimore County, to develop the best model for the City. The recreation model should include staffing, volunteer training and recruiting, partnership programs and use of non-profit organizations. The model must consider the needs of Baltimore residents first. The fee structure for use of recreational facilities and fields should be a sliding scale with the lowest fees to groups serving City youth. Many of our recreational facilities, such as fields, gymnasiums, and indoor soccer arenas, are not well used by City residents. In many cases lack of use is due to poor condition. All facilities need to be in good condition with adequate facilities such as bathrooms, lighting and equipment. Visitors and citizens are more likely to participate and support these facilities if they are in good repair. Having more active community resources will also enhance community identity and cohesion.

Implement Bicycle Master Plan to provide recreational opportunities for residents	•		•	Increased number of cyclists, Increased number of bikeways	Rec. & Parks, DOT, DOP	Years 1-3	Federal DOT, State, MVR	Improved air quality and Improved public health
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Most major Cities have well developed bicycle and greenway trail networks, including Philadelphia, Chicago, Seattle and Washington, DC. To enhance and promote bicycling as a means of recreation and transportation, the City of Baltimore is creating a Bicycle Master Plan. Implementing the recommendations of the Plan will make bicycle transportation safe and accessible for the largest number of people.

Goal 3: Increase the Attractiveness of Baltimore’s Natural Resources and Open Spaces

Objective I: Maintain a Well-managed System of Parks & Open Spaces

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Locate dedicated, sustainable funding sources for our parks and cultural assets			•	Increased number of dedicated funding sources in place	Rec. & Parks, Planning, Finance, Alliance for Great Urban Parks	Years 1-2	General Funds	More predictable and sustainable park funds

The City’s park system is an important asset to residents of Baltimore. Properly maintained parks enhance property values. Baltimore City’s Department of Recreation and Parks has \$60 million of deferred maintenance. In addition, the dollars spent per capita for parks and recreation maintenance is one of the lowest in the nation. It is necessary to find sustainable funding sources for the Department of Recreation & Parks in order to restore and maintain a viable park and recreation system similar to Chicago’s Gateway Green Initiative.

Create park and open space zone in the Zoning Ordinance		•		Decreased number of variances and URP’s for mixed-use, Increased mixed-use in neighborhood centers	Planning/BMZA/HCD/Law/Mayor and City Council	Years 2-4	GO Bond, general funds, hotel tax	Increased tax base and density
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Baltimore’s parks are currently zoned residential. This zoning designation leads to confusion, permitting developers to perceive the land is available for development. Furthermore, none of the permitted uses in residential zones are appropriate for parks. A discrete park and open space zone should be established and park master plans should be created to better protect parkland and open spaces to allow for uses that are appropriate as well as for phasing of capital improvement funding.

Improve park stewardship and safety by expanding current parks partnership program			•	Legal language that permits Recreation & Parks to allow private entities to lease park land, Increased number of groups adopting parks	Rec. & Parks, Law Dept. DOP	Years 1-2	General Funds	Greater flexibility for Rec. & Parks in the management of parks, greater funds from leases; Reduced costs for parks maintenance through cooperative partnerships
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The Baltimore City Department of Recreation and Parks currently has 34 *official partnerships* with organizations throughout the City. However, the Baltimore City Charter limits the ability of the Department of Recreation and Parks to enter into partnerships with private partners to lease park property. A charter amendment would provide greater flexibility for more creative partnerships, facilitate stronger private connections and allow organizations to take the lead in keeping neighborhood parks attractive, clean, safe and programmed with structured activities.

Objective 2: Protect and Enhance Baltimore's Natural Habitat and Environmental Resources

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Install 10 trash interceptors at storm drain outfalls over 3 years.	•		•	Improve water quality and reduce trash in Baltimore's bodies of water by	DOP, BDC, USACE, Watershed Associations	Years 2-5	MVR, Federal USACE funds, Private funds	Improved water quality and reduction of trash in bodies of water

Floatable trash is a major problem impacting Baltimore's harbor and waterways. Trash is washed off of the street system into the storm drains and deposited into streams and eventually the Harbor. Floatable trash is unsightly; it smothers wetlands and wildlife habitat, carries bacteria, and damages the engines of recreational vessels. A plan is needed to identify methods for trash reduction, such as building trash interceptors at storm drain outfalls and catching trash before it enters streams.

Develop a plan to reduce trash within and along Baltimore's parks and open space (See LIVE, Goal 1, Objective 2, Strategy 3)	•		•	Decreased volume of trash in public spaces	DOP, DPW, Planning, Watershed Associations	Year 3	MVR funds, Federal, Private funds	More attractive, cleaner neighborhoods, parks and streets, better water quality and habitat
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Restore and protect all floodplains and stream valleys	•		•	Stream reconstruction for improved water quality, flood control and habit	DPW, Planning, Rec. and Parks	Years 1-5	MVR funds, CA offset fees, State funds(mitigation projects)	Increased water quality/better flood control/ better habitat
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Restoring and protecting floodplains and stream valleys improve water quality by reducing erosion and providing habitat areas. Managing water storage areas for flood water stabilizes property boundaries by preventing loss of structures and reducing flood damage. In addition, restored streams provide active and passive recreational opportunities, such as picnicking, sightseeing, fishing and swimming. Many people also enjoy camping, hiking, jogging, or bicycling near a stream.

Complete plans for and creation of Greenway trail system	•		•	Completed # of trail miles	Rec. & Parks, DOT, Planning	Years 1-6	MVR, GO Bonds, General Funds, Federal	Improved environmental quality and Access to recreation
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Restoring green spaces and protecting riparian buffers in stream valleys improve water quality and provide habitat for wildlife. The City will plan and complete the Jones Falls and Herring Run Greenway Trails and connect them to the Inner Harbor Promenade.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Increase Baltimore's green infrastructure by increasing the number of trees and tree canopy size. (See LIVE, GOAL 1, Objective 2, Strategy 2)	•		•	Increased number of street trees, Increased longevity of trees	Parks & Rec/ Forestry/ Planning/ DPW/ Transportation/ MD DNR/USFS/ Private Sector	Years 2-6	MVR funds, General Funds, GO Bonds	Higher property values, lower energy costs. Improved air and water quality

Trees are an important part of the City's infrastructure. Trees provide shade and cool the air, lowering temperatures throughout the City. They filter pollution and particulates, cleaning both our water and air. The presence of trees has been shown to have positive psychological benefits--reducing stress and improving health. Some studies even link trees to reduced crime rates. However, Baltimore's tree population is in decline. The City is setting Urban Tree Canopy Goals for the area and creating a Comprehensive Forestry Management Plan to help Baltimore meet the tree canopy goals.

Objective 3: Ensure Public Access to the Waterfront

Complete the Harbor Promenade and Middle Branch park/trail systems	•		•	Completion of seven mile promenade along Harbor waterfront. Completion of public waterfront access along entire shoreline of Middle Branch	DOP, Rec. & Parks, DOT, BDC, Inner Harbor Task Force	Years 1-6	GO Bonds, General funds, state funds, federal funds	Greater access to Baltimore's waterfront
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Baltimore's waterfront is one of its greatest natural assets and should be available for all to enjoy. The City must protect public access to the waterfront. Access to waterfront resources should be available to everyone. At completion, the Inner Harbor Promenade should extend from Canton Crossing to the Museum of Industry.

