

THE ECONOMIC IMPACT OF ORIOLE PARK AT CAMDEN YARDS

Results of a Fan Spending Survey for the 1992 Season

December, 1992

Kurt L. Schmoke, Mayor



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Baltimore City Department of Planning

**In Cooperation With:
Baltimore Development Corporation
and
Downtown Partnership of Baltimore**

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EXECUTIVE SUMMARY

THE ECONOMIC IMPACT OF ORIOLE PARK AT CAMDEN YARDS: Results of a Fan Spending Survey for the 1992 Season

The Orioles first season at Oriole Park at Camden Yards attracted 3,568,000 fans to Downtown Baltimore to see baseball games. The record of 59 consecutive sellouts is sufficient evidence of the success of the ballpark. But did the new ballpark also succeed in generating economic activity in the community outside the ballpark?

The Baltimore City Department of Planning directed a survey of about 1000 fans attending games at Oriole Park at Camden Yards in order to assess how much fans spent outside the ballpark during the 1992 season. This focus on "out-of-stadium spending" allows for special attention to the central economic impact question which is particular to downtown stadiums: does the Camden Yards ballpark have greater spin-off benefits because of its proximity to hotels, restaurants, attractions, and retail establishments? The answer, it has been found in this study, is an unqualified "yes."

The following are highlights from the findings and conclusions.

The Ballpark as a Tourism Generator

Oriole Park at Camden Yards attracted so many out-of-town fans to Baltimore that it should be considered a major tourist attraction.

In 1992 1.6 million out-of-town fans (46% of all fans) were attracted to Baltimore to see a ballgame (out-of-town fans are those not from the Baltimore metropolitan area). Attendance by out-of-town fans was up 76% relative to Memorial Stadium. The largest increase (117%) was from fans who were not from either the Baltimore area or the Washington area. These fans came, not just from the mid-east region, but also from all over the United States.

12% of all fans stayed overnight in the Baltimore area, spending \$26.8 million dollars in the City of Baltimore. Of all persons staying in hotels or motels, 58% stayed in Downtown hotels, accounting for 45,000 hotel room nights. The ballpark generated enough demand to fill a 123-room Downtown hotel 365 days per year.

Almost 500,000 out-of-town fans were new tourists to Downtown Baltimore, over and above the level of tourism which was generated by Memorial Stadium. (Out-of-town fans were counted as tourists only if they combined their ballgame attendance with other Downtown retail or attraction spending.) These new visitors represented a 12% increase in the total annual volume of Downtown tourism.

"The stadium can be seen as the capstone to the urban renaissance era that Harborplace put in high gear twelve years ago; the culmination of City revitalization efforts throughout the 1970's and 1980's." Ed Guntz, The Sun, 5/5/92.

"For Sports Center USA the development of the ballpark was one of the critical variables in our decision to propose the Power Plant redevelopment. It was very important to us that Camden Yards successfully established Downtown as the place to go for sports and entertainment." Lynda O'Dea, President, Sports Center USA, which is planning a \$30 million sports-oriented indoor theme park in the Inner Harbor.

Every 1992 sell-out game had the following effect on Downtown:

- * More than 15,000 fans patronized Downtown restaurants, bars, attractions and retail establishments, spending more than \$160,000;
- * About 660 Downtown hotel rooms were occupied by game-goers;
- * Patronage of the Aquarium went up 8%;
- * Patronage of the Babe Ruth Museum went up 50%;
- * Downtown garages took in \$17,200 in event parking fees.

Including both pre- and post-game spending and overnight spending, out-of-towners spent \$46 million in the Baltimore area. This should be regarded as "new" money to the local economy, i.e., it is a source of real economic growth.

Synergy with Downtown

The new ballpark produced economic spin-off benefits exactly as had been hoped for: it drew suburbanites and out-of-town visitors to Downtown, and many came early or stayed late, patronizing Downtown restaurants, bars, attractions, and retail establishments.

- * More than one-third (35%) of all game attendees Downtown restaurants, bars, and other establishments, before or after games.
- * Almost 80% of all fans who made pre-or-post-game spending stops did so in the Downtown area.
- * More than 70% of fans who went to two or more previous games had at least "sometimes" combined game attendance with other Downtown activities.
- * Fan pre- and post-game spending for 1992 amounted to a \$12.7 million impetus to the Downtown economy.

Comparison to Memorial Stadium

Fan out-of-stadium spending for 1992/Camden Yards was almost two-and-one-half times the comparable number for 1991/Memorial Stadium, representing a net increase of \$31.2 million in the Baltimore regional economy.

While there was a concentration of spending gains in the downtown area, there was also greater fan spending in the rest of Baltimore City and in Baltimore's suburban areas.

Exceeding Expectations

Actual stadium-related spending for 1992 surpassed expectations, substantially exceeding each of three pre-season predictions.

In 1985, proponents of the Camden Yards site (the "Butta Committee") projected total annual out-of-stadium spending of \$23.1 million (1992 dollars). The actual 1992 out-of-stadium expenditures were \$52.8 million, more than twice the prediction.

Total Spending Outside the Ballpark

Total spending outside the ballpark for the Baltimore region in 1992 was \$52.8 million.

Baltimore City benefited from a total of \$38.1 million in fan out-of-stadium expenditures. The majority of these expenditures (\$30.2 million) were undertaken in the Downtown area.

Suburban areas also benefited from almost \$15 million in fan spending (mostly from out-of-town visitors staying in suburban hotels and motels).

"It (the development of the ballpark) seemed like a once in a lifetime opportunity to have a beneficial impact on the City and its future." Eli Jacobs, owner, Baltimore Orioles, as quoted in The Sun, 4/5/92.

FIGURE 1
Vicinity Map



DOWNTOWN



Baltimore City Department of Planning, Baltimore, MD

I. INTRODUCTION

The opening season of Oriole Park at Camden Yards has been an unqualified success: attendance exceeded expectations; traffic congestion and parking problems were less than expected; and the design of the ballpark has been lauded as a national model for stadium development. The only unanswered question is whether or not the economic impact of the ballpark also met expectations.

Greater benefit from fan spending was one of the main reasons that Camden Yards was chosen over two suburban stadium sites. Thus, the expectations have been high. The results are now in: fan spending impacts have met or exceeded expectations in every predicted category.

Fan spending was estimated by the Baltimore City Department of Planning through a survey of 983 fans at the ballpark on three nights in late August and early September. Interviews were also conducted with managers of Downtown restaurants, bars, and hotels in order to confirm the results and judge the actual effects on Downtown businesses. (See Appendix I for more detail on the methodology.)

Specific Questions

There are four economic impact questions which this study is designed to answer:

1. Has the new ballpark, in effect, increased tourism by drawing more out-of-town and overnight fans to Baltimore?
2. Does the ballpark have a synergistic relationship with the Downtown economy? Do fans come directly to the ballpark and leave, or do they do other things before and after games in the Downtown area?
3. Has there been a significant net gain in fan spending compared to recent years at Memorial Stadium, or is stadium-related spending just being shifted from one part of the City to another?
4. Has the actual economic impact of fan spending outside the ballpark equalled or exceeded the projections which were made in stadium planning studies?

"We believe there is excellent synergy between the sports facility at Camden Yards and the Inner Harbor. Visitors to the harbor areas are prime potential patrons for baseball games. Likewise, fans are likely to visit the Inner Harbor before and after games." Peat Marwick & Co. in the study that recommended Camden Yards over two suburban sites, Evaluation of Stadium Site Alternatives, 1986.

What's counted and what's not counted

It should be stressed that this report focuses only on fan spending outside the ballpark and its effect on Downtown and the local economy. A stadium located anywhere will generate economic spin-offs from in-stadium concession sales, ticket sales, parking, team operations, and stadium operations. However, it has been theorized that a Downtown stadium will maximize "out-of-stadium" fan expenditures because of its proximity to hotels, restaurants, and attractions. This study tests that theory as it relates to the Orioles first season at Oriole Park at Camden Yards.

Consistent with this purpose, this study seeks to identify and report discretionary consumer spending associated with game attendance; i.e., spending at hotels, restaurants, bars, attractions and other retail stores. Not included are: parking, gasoline, transit, or any in-stadium expenditures, such as ticket sales and concession sales.

Fan expenditures are reported here in two categories:

- * **Pre- and post-game spending.** For example, pre-game spending is spending which occurs after one leaves his or her home or hotel and before he or she arrives at the ballpark.
- * **Overnight spending.** Includes total daily spending by out-of-town fans who are staying overnight in Baltimore. Spending by overnights includes only persons who said that the primary purpose of their trip was to see the ballgame.

Consistent with the purposes outlined above, the study counts only direct spending impacts (no multipliers have been used). Consistently conservative assumptions have been employed in order to isolate economic gains that would not be present without the new ballpark.

The Maryland Department of Economic and Employment Development has produced an economic impact assessment which fully accounts for all stadium-related direct and indirect expenditures in the State of Maryland.¹ That study uses assumptions about out-of-stadium expenditures and does not calculate benefits to Downtown Baltimore or the local economy. The two studies form the complete picture of stadium and baseball economic impact.

"The Camden Yards site has the greatest potential to (produce economic development impacts) due to its location proximate to this commercial area (the Downtown/Inner Harbor area)." HOK, in its review of 14 potential new stadium sites, Baltimore Stadium Study, 1985.

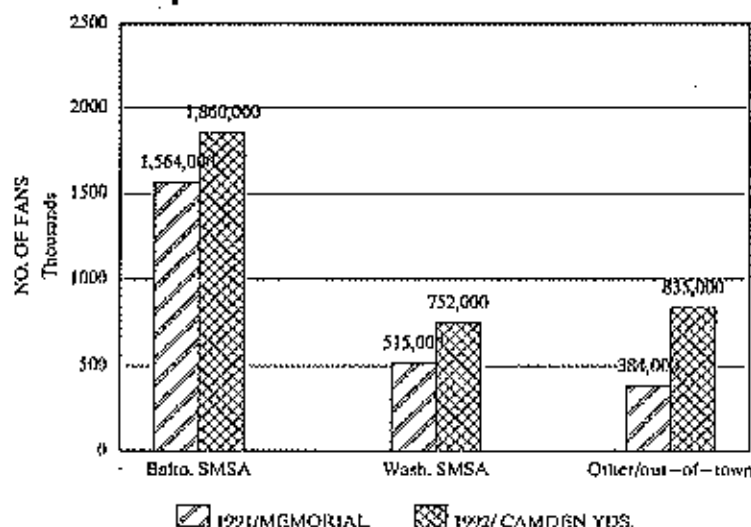
II. FINDINGS AND CONCLUSIONS OF THE STUDY

1. The Ballpark As A Tourism Generator

Oriole Park at Camden Yards is attracting so many out-of-town fans that it should be considered a major tourist attraction and, therefore, part of Baltimore's economic base.

In 1992 almost 1.6 million out-of-town² fans were attracted to Baltimore to see a ballgame (46% of all fans). Many of these out-of-towners were from the Washington area, but, in a significant shift, the largest increase in attendance came from persons who are not from either the Baltimore area or the Washington area (now 24% of all fans). The number of these fans more than doubled from 1991/Memorial Stadium to 1992/Camden Yards.³ (See Figures 2 and 3.) Out-of-town fans came mostly from the mid-Atlantic region, but also from all over the United States and a few from foreign countries.

FIGURE 2
Fans' Place of Residence
Comparison of Memorial/1991 to Camden/1992



The money these out-of-town fans spent in Baltimore, particularly that spent in local hotels, restaurants and bars, can be considered a source of economic growth, i.e. it is money which would not have been spent in Baltimore if there were no stadium or no baseball team.

But did these fans simply drive to the stadium and leave directly? Of course, many did just that, but more than 40% (621,000) of them also patronized other establishments in Baltimore City.

"The greatest impact of the new ballpark has been that it helps make Downtown a lively, exciting place to be -- it brings the local people, and then the tourists want to stay, even if they don't have ballgame tickets, because we have a unique, vibrant urban experience." Mike Whipple, General Manager, Sheraton Inner Harbor Hotel, which reported a 21% increase in discretionary room demand for the summer of 1992 compared to the summer of 1991.

"The impact was extraordinary, well beyond our expectations," Beth Barnes, General Manager, Tremont Plaza Hotel, which reported that occupancy went up an average of 20% on game days.

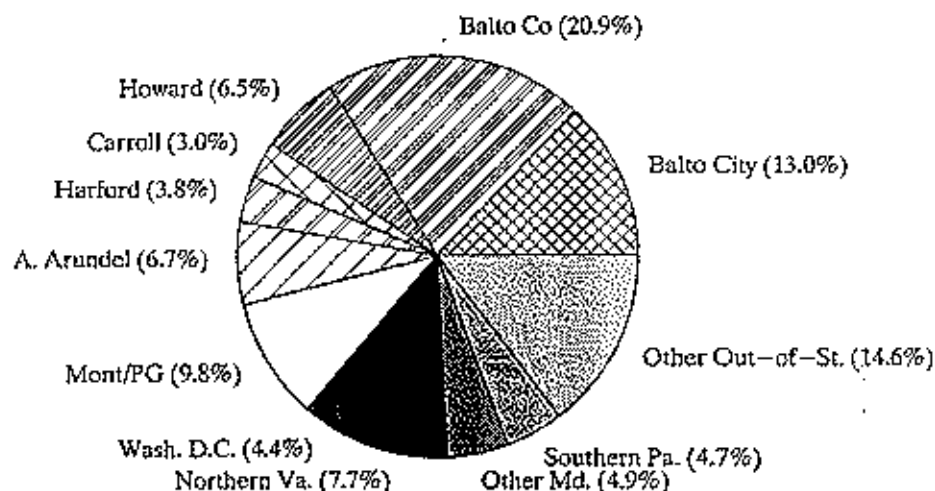
The attendance at the National Aquarium went up an average of 8% on game days in 1992.

A group of four from New Jersey had come to seven games this year, and each time they spent the night in a Downtown hotel and spent the day enjoying Downtown Baltimore. (Fan interview, 9/12/92)

Stadium-related hotel demand generated room tax revenues of approximately \$400,000 to Baltimore City and \$410,000 to the State of Maryland for the 1992 season.

In 1992, 14,200 persons took guided tours of the new ballpark, thus generating activity during non-game times.

FIGURE 3
Fans' Place of Residence
1992 Fan Survey



About 26% of out-of-town fans also stayed overnight in Baltimore⁴, generating about 85,000 room-nights in area hotels and motels. The majority of hotel/motel stayers bedded down in Downtown hotels, generating 45,000 hotel room nights and spending \$19.8 million dollars.⁵ The percentage of fans staying overnight by place of residence groupings was as follows:

All Fans	12%
Out-of-Town (not from the Baltimore SMSA)	26%
From Outside Both Baltimore and Washington Regions	39%

The new ballpark's contribution to Downtown tourism also includes day-trip fans who combined going to the game with other Downtown activities. Using conservative assumptions⁶ it is estimated that 482,000 net new tourists were attracted to Downtown Baltimore by the new ballpark (over and above a 1991/Memorial Stadium figure). This represents a 12% increase in the total volume of Downtown tourism (based on a 4 million tourist volume estimate by Maryland DEED.⁷)

Total out-of-stadium spending by out-of-town fans was \$46.1 million in 1992. More than one-half (54% or \$24.9 million) of this spending was undertaken in the Downtown area. Table 1 summarizes the results. (See Chapter III for an explanation of the calculations.)

One cautionary note is that some drop-off in attendance by out-of-town fans should be anticipated in future years. The favorable publicity associated with the opening of the ballpark generated interest by out-of-town fans which may prove to be somewhat transitory. On the other hand, the ballpark's location and design are ideal for continued marketing to out-of-town visitors.

TABLE 1
Spending by Out-of-Town Fans
(\$Millions)

Spending in Downtown			
Non-Stadium Spending by Residents of:	Pre/Post Game	Overnight*	Total**
Washington SMSA	\$2.26	\$3.67	\$5.72
Other Out-of-Town	\$4.85	\$16.08	\$19.22
TOTAL	\$7.11	\$19.75	\$24.94
Spending in Baltimore SMSA (Including Downtown)			
Non-Stadium Spending by Residents of:	Pre/Post Game	Overnight*	Total**
Washington SMSA	\$2.91	\$7.40	\$10.03
Other Out-of-Town	\$6.24	\$32.00	\$36.04
TOTAL	\$9.15	\$39.40	\$46.07

*Total daily spending by overnights. Spending by overnights includes only those fans indicating the main "purpose of their trip" was to see the ballgame, which was 59% of all overnights.
 **Totals have been adjusted to account for double-counting of spending by overnights whose total daily expenditures would include their pre/post game spending.

The attendance at the Maryland Science Center went up an average of 3.2% on game days in 1992.

"At Harborplace we had one of our best summers ever, and one of the major reasons was that splendid ballpark!" Joan Davidson, Sales and Marketing Manager Harborplace and the Gallery.

2. Synergy With Downtown Business

The Ballpark has a synergy with Downtown which results in significant mutual benefit for both the Downtown economy and the Orioles.

Downtown Business Benefits

In 1985 and 1986, as the stadium debate took place, some of the argument revolved around economic impact issues. The proponents of the Downtown site argued that stadium-related spin-off benefits would be highest Downtown because of the synergy created with Downtown hotels, restaurants and other retail businesses.

The indications are that the Downtown proponents were right -- that the synergy created between Downtown and the new stadium does produce significant benefits which would not have been achieved at other sites.

At least five recently-opened Downtown restaurants, bars, and sports-related emporiums have said that the new ballpark was the determining factor in their location decision.

Cappricio Restaurant in Little Italy reported a 12% increase in increase in business on game days.

Downtown garages took in \$1.3 million in ballgame-generated parking revenues. City parking tax revenues (collected for both on-site and off-site/garage parking) for 1992 were estimates to be \$260,000.

Pickles Pub on Washington Boulevard hired 15 new employees to handle the Ballpark clientele; they reported that business tripled on game days.

This is indicated by:

- * On average 35% of all fans combined their trip to the ballpark with other pre- or post-game activities in the Downtown area. For each sell-out game, this put more than 15,000 potential new customers on the streets of Downtown.
- * More than 70% of fans who have gone to two or more games have at least "sometimes" combined game attendance with other Downtown activities.
- * About 80% of all pre-game and post-game stops occurred in the Downtown area. (The comparable proportion in Pittsburgh is only 37%.)
- * Compared to other cities where fan surveys have been undertaken, fans going to Camden Yards are significantly more likely to undertake pre-game or post-game activities. This higher level of pre/post game activity is presumably due to the convenience of spending opportunities near the ballpark. (See Chapter III.)
- * Fan pre- and post-game spending provided a \$12.7 million impetus to the Downtown economy for the 1992 season. When parking revenues for Downtown garages are added, the total jumps to \$14 million.
- * While Downtown restaurants, hotels and bars were the main beneficiaries of fan out-of-stadium spending, even attractions such as the Aquarium and the Maryland Science Center reported game-day attendance increases of 7% and 3%, respectively.
- * Downtown hotels captured the majority (56%) of overnight fans staying in hotels or motels. For a typical sell-out game, 660 Downtown hotel rooms were occupied by fans who came to Baltimore specifically to see baseball.

There may also be an opportunity for future growth in Downtown pre- and post-game spending. First-time ballpark visitors were probably more interested in experiencing the ballpark than in experiencing Downtown. A good marketing campaign could easily entice more Downtown spending in future years.

Benefits for the Orioles

The Orioles, also, have benefited from their new Downtown location. Certainly, the record of 59 consecutive sellouts can be regarded as sufficient evidence that the fans like the new location. The survey results also suggest that part of the reason the ballpark is so popular is because of the opportunity to combine the baseball game with other activities Downtown, as indicated by:

- * 63% of fans responded that they were "more likely" to attend games because of the new Ballpark's "location near restaurants, attractions, and other facilities."

- * More than 25% of fans who have gone to 2 or more previous games indicated that they combined the ballgame attendance with other Downtown activities "most of the time" or "all of the time."
- * 11% of all fans indicated other-than-ballgame purposes for their trip to Baltimore. These "other purposes" were most frequently "pleasure travel," followed by "work downtown," "business trip," and "attend convention," all of which would tend to indicate ballgame attendance was subordinate to some other reason for being Downtown. (See Chapter III).

All of these factors lead one to conclude that the dramatic increase in Orioles attendance was due, in part, to the ballpark's synergistic relationship with Downtown businesses and attractions.

3. Comparison To Memorial Stadium

Out-of-stadium spending for the 1992 season at Oriole Park at Camden Yards is several multiples of comparable figures for spending at Memorial Stadium, thus indicating that the Downtown location does, indeed, encourage more spending.

Although there are no comparable fan spending surveys for Memorial Stadium, the Maryland Department of Economic and Employment Development estimated fan out-of-stadium spending for the 1984 season to be \$8.6 million. The estimated 1991 spending level was \$21.6 million (calculated by adjusting for inflation, attendance variation, and several findings from this 1992 study).⁸ The comparable figure for Camden Yards is \$52.8 million, a 144% increase over 1991. On a per capita basis (holding attendance constant) fan spending for the 1992 season at Oriole Park at Camden Yards is more than one and one-half times the same figures for Memorial Stadium. Looking at spending by local fans only, per capita spending at Camden Yards is more than two times the local fan spending at Memorial Stadium. (See Table 2.)

If one were to try to compare what the Waverly business community has lost versus what Downtown has gained, the differences would be even more exaggerated because out-of-stadium spending was geographically more dispersed at Memorial Stadium than it is at Camden Yards. The survey verified this conclusion in that 80% of fans indicated that they were "more likely to spend time in the Stadium area before and after games" at Camden Yards than they were at Memorial Stadium.

The geographic location of Stadium-related spending, with a comparison of Memorial Stadium/1991 to Camden Yards/1992, is portrayed in Figure 4. (1991 Memorial Stadium data was generated by using assumptions about where money was spent.⁹) The key finding is that, while the Downtown area benefited the most, as would be expected, the rest of Baltimore City and the suburban areas also benefited significantly from the spending generated by the new Stadium.

For the Baja Beach Club the new ballpark was one of the reasons they chose a Downtown location. They reported that business went up 15% on game days.

A group of two charter buses from Philadelphia came 4 hours before the game so that the whole group could go to the Inner Harbor. (Fan interview, 8/26/92)

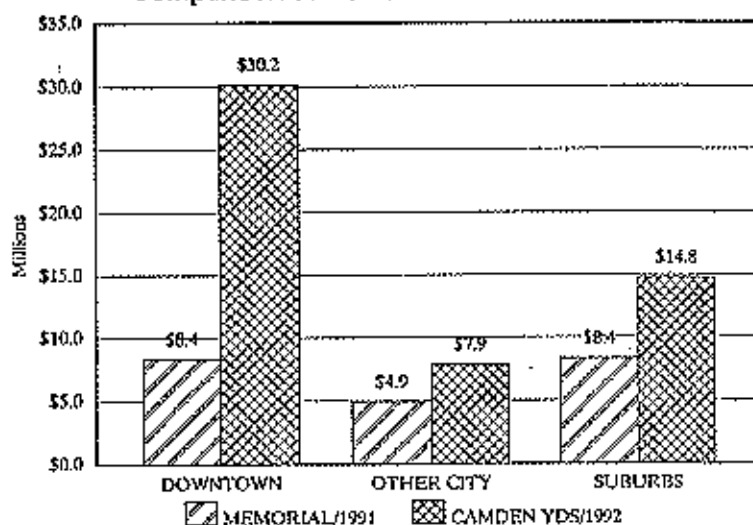
"It definitely helps to be able to tell prospective tenants that we're on the light rail line going to the stadium." Elaine Macklin, Resident Manager, Sutton Place Apartments.

The Hyatt Hotel attributed 1,000 net new room-nights to the new ballpark.

TABLE 2
Fan Spending Comparison
Memorial Stadium/1991 vs. Camden Yards/1992

	1991/ Memorial Stadium ^a	1992 /Camden Yards
Total Out-of-Stadium Expenditures	\$21,648,000	\$52,820,000
Expenditures per Capita, All Fans	\$8.84	\$15.30
Expenditures per Capita, Local Fans Only	\$1.44	\$3.60

FIGURE 4
Location of Out-of-Ballpark Spending
Comparison of Memorial/1991 to Camden/1992



4. Exceeding Expectations

The economic benefit performance of the new Ballpark has consistently exceeded every prediction of its economic impact.

Three studies have made predictions of out-of-stadium spending impacts for the Camden Yards ballpark.

Fan Out-of-Stadium Spending

The first prediction was in the 1985 proposal for the Camden Yards site by the HOK consultant group for the so-called "Butta Committee." It estimated total fan out-of-stadium spending to be \$17.8 million, of which \$14.1 million would be capturable in Baltimore City.⁹ Our study findings indicate total out-of-stadium spending of \$52.8 million of which \$38.1 million was captured in the City. Even after inflation was taken into account the actual 1992 spending was more than twice the predicted spending. (See Table 3.)

Spending by Out-of-Town Fans

A second stadium economic benefit study was commissioned by the Maryland Stadium Authority and carried out by Peat-Marwick Co. in 1987. It focused on spending by out-of-town fans¹⁰ and predicted that the new stadium would attract \$9.7 million (or \$12 million in 1992 dollars) of out-of-town dollars to Baltimore. The actual 1992 number was \$36 million, triple the prediction. (See Table 3.)

Downtown Pre-and-Post-Game Spending

A third prediction of spending impacts was prepared by the Baltimore City Planning Department in 1992. This estimate concluded that pre- and post-game spending would add \$9.75 million to the Downtown economy.¹¹ The actual 1992 spending number is \$12.4 million.

Figure 5 illustrates the unanticipated gains in each of the three predicted spending categories discussed above.

Oriole Park at Camden Yards is "The best plan for a major league baseball park in more than a generation... This is a building capable of wiping out, in a single gesture, 50 years of wretched stadium design..." Paul Goldberger, New York Times architecture critic, whose column helped make the ballpark a tourist attraction.

Attendance at the Babe Ruth Museum is up 110% for the summer of 1992 compared to the summer of 1991.

TABLE 3
Three Fan Spending Projections
Compared to Actual 1992 Results

Total Fan Spending Outside Ballpark		
Category	HOK Estimate, Adjusted to 1992 Dollars ⁹	Actual 1992 Result
Out-of-Stadium Spending per Capita	\$8.94	\$15.30
Total Out-of-Stadium Spending	\$23.1 million	\$52.8 million
Capturable in Baltimore City	\$18.2 million	\$38.1 million
Spending by Out-of-Town Fans		
Category	Peat-Marwick Estimate, Adjusted to 1992 Dollars ¹⁰	Actual 1992 Result
Out-of Town Fans as a Percentage of All Fans	18.5%	24.2%
Per Capita Spending by Out-of-Town Fans	\$27.86	\$43.17
Total Out-of-Town Fan Spending	\$12.0 million	\$36.0 million
Downtown Pre- and Post-Game Spending		
Category	Planning Department Estimate ¹¹	Actual 1992 Result
Percentage of All Fans Who Stop Downtown Pre- or Post-Game	30%	35.1%
Amount Spent per Person per Stop	\$13.00	\$10.82
Total Pre/Post Game Spending	\$9.7 million	\$12.46 million

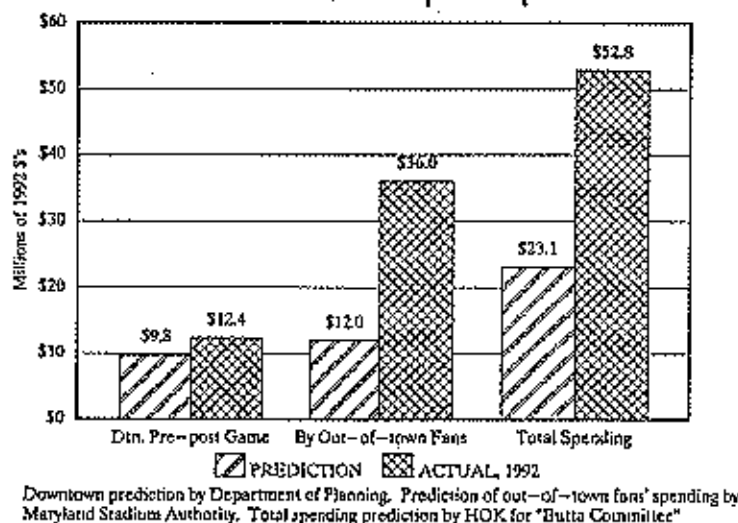
"The effect has been very positive. Some nights the ballgame crowd provides most of our customers." Barbara White, Manager, Pete's Pizza (Harborplace) which reported that business goes up 20% on game days.

Sliders Bar and Grill reported a 50% to 100% increase in business on game days.

Total Expenditures

As shown in Table 4 total of out-of-Stadium discretionary expenditures for the 1992 Season were \$52.8 million. More than 75% (\$39.8 million) was spent by overnighters who came to Baltimore for the specific purpose of seeing a game. More than 85% (or \$46.1 million) was generated by out-of-town fans and can be regarded as "new" money to the Baltimore area.

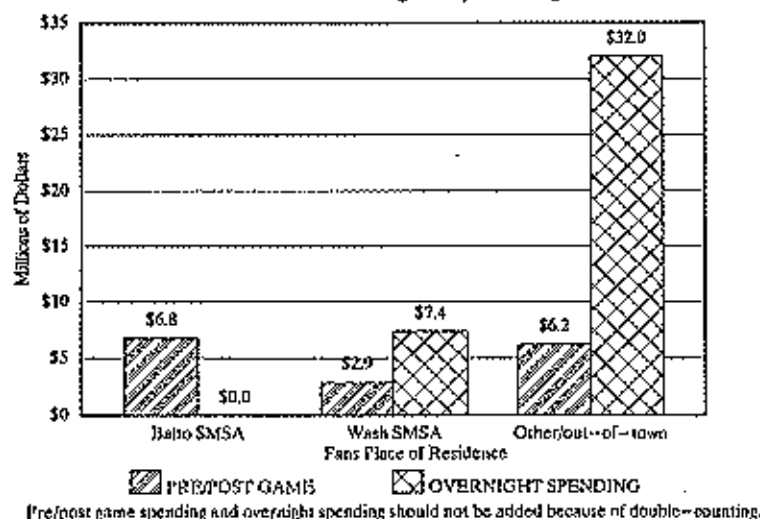
FIGURE 5
Stadium Economic Impact Predictions and Performance: Out-of-Ballpark Expenditures



The majority (57% or \$30.0 million) of all out-of stadium spending occurred in the Downtown area. The rest of the City also benefited from a \$7.9 million fan spending impetus. Suburban areas similarly benefited from \$14.7 million in fan spending, primarily from overnights staying in suburban hotels and motels.

Figure 6 shows fan expenditures by fans's place of residence and illustrates the economic importance of attracting out-of-town/overnight fans.

FIGURE 6
Spending by Fans' Place of Residence
Pre/Post Game and Overnight Spending in Baltimore



A group of four couples from Philadelphia made a weekend trip to Baltimore, going to the ballgame on Sunday, staying in a Downtown hotel, and going out to dinner on Saturday. (Fan interview, 9/13/92)

No Way Jose, which joined with other South Baltimore businesses in sponsoring a shuttle bus to the ballpark, reported a 10% to 30% increase in business on game days.

TABLE 4
Total Spending by Location (\$Millions) *

Spending in Downtown (excluding at Ballpark)			
Residents of:	Pre/Post Game	Overnight	Total**
Baltimore SMSA	\$5.25	—	\$5.25
Washington SMSA	\$2.26	\$3.67	\$5.72
Other Out-of-town	\$4.85	\$16.08	\$19.22
Total	\$12.36	\$19.75	\$30.19
Spending in Baltimore City (including Downtown)			
Residents of:	Pre/Post Game	Overnight	Total**
Baltimore SMSA	\$5.65	—	\$5.65
Washington SMSA	\$2.44	\$5.04	\$7.25
Other Out-of-town	\$5.22	\$21.79	\$25.17
Total	\$13.31	\$26.83	\$38.07
Spending in Suburbs			
Residents of:	Pre/Post Game	Overnight	Total**
Baltimore SMSA	\$1.10	—	\$1.10
Washington SMSA	\$0.47	\$2.36	\$2.78
Other Out-of-town	\$1.02	\$10.21	\$10.87
Total	\$2.59	\$12.57	\$14.75
Spending in Baltimore SMSA Totals			
Residents of:	Pre/Post Game	Overnight	Total**
Baltimore SMSA	\$6.75	—	\$6.75
Washington SMSA	\$2.91	\$7.40	\$10.03
Other Out-of-town	\$6.24	\$32.00	\$36.04
TOTAL	\$15.90	\$39.40	\$52.82

*For more detail on the methodology, see Chapter III.

**Total* is less than the sum of *Pre/Post Game* and *Overnight* because double-counted spending has been eliminated.

III. DETAILED SURVEY RESULTS AND ANALYSIS OF SPENDING

Pre- and Post-Game Spending

Fans Making Pre/Post Game Stops

Fans were asked to identify if they had patronized any establishments after leaving home but before arriving at the ballpark. The percent of all fans making stops was as follows:

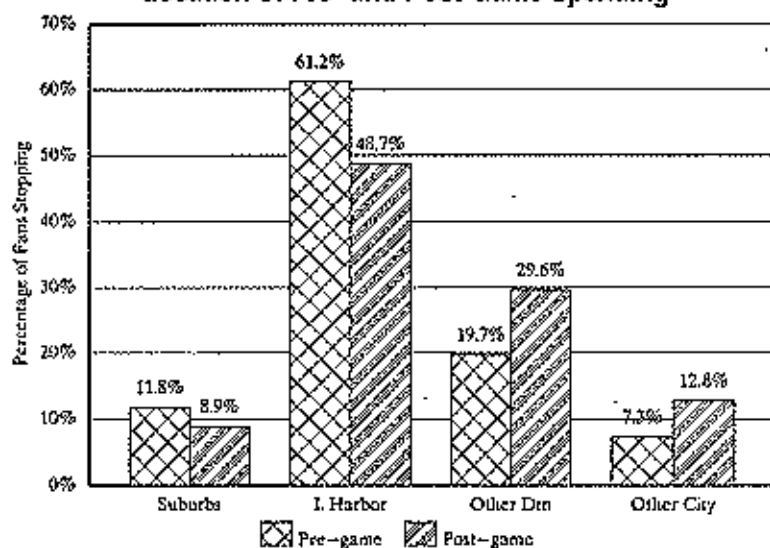
Pre-game stops	29.1%
Definite post-game stops	18.2%
Possible post-game stops	16.6%
Both pre-and-post-game stops	8.3%

Area of Fans' Stops

Almost 80% of all pre- and post-game stops occurred in the Downtown area showing a strong synergy between Downtown business and the Stadium. The Inner Harbor area captured a majority of all pre-and-post-game spending activities. Suburban areas captured about 10% of all activities. See Figure 7.

FIGURE 7

Location of Pre- and Post-Game Spending



Other Downtown includes Little Italy. *Other City* includes S. Baltimore and Fells Point.

Wayne's BBQ in the Inner Harbor hired fifteen new employees primarily to meet the increased demand from the ballpark clientele.

"It was a great summer largely due to the ballpark!" Jim Kolmansberger, Manager, Balls, which reported that business goes up 50% on game days.

More than one-third (35.1%) of all fans said they patronized establishments in the Downtown area either before or after games. (This assumes, conservatively, that one-third of those who said they "might stop" after the game actually did stop.)

A gentleman from Baltimore County said his two favorite things to do were to go out to dinner in Little Italy and to go to ballgames. Now every time he goes to the ballpark he goes out to dinner in Little Italy, too. (Fan interview, 9/13/92)

Comparison to Pre- and Post-Game Stops in Other Cities

Compared to comparable surveys taken for sporting events in other cities, Baltimore's pre-and-post-game activity is both more frequent and more concentrated in the Downtown area. (See Table 5.) This tends to reinforce the conclusion that the convenience of Camden Yards to Downtown/Inner Harbor retail establishments does, indeed, increase economic spin-offs.

TABLE 5
Comparison of Pre- and Post-Game Stops in Other Cities

	Stop Before	Stop After	Downtown Capture Rate	Overnight Fans Staying Downtown
BALTIMORE	29.1%	22.1%	80.1%	36.8%
Pittsburgh ¹²	15.8%	28.1%	37.0%	18.2%
Montreal ¹³	5.0 %	19.0%	—	—
Atlanta Falcons ¹⁴	19.0%	21.0%	—	—

Previous Games/Frequency of Downtown Stops

Survey respondents who had been to two or more previous games were asked how often had they combined their ballgame attendance with pre- or post-game activities in or near Downtown. The response was that 72% indicated that they at least "sometimes" stopped Downtown. Respondents indicated the following frequency of pre-or-post-game stops Downtown:

Never	27.7%
Sometimes	30.3%
About half the time	15.7%
Most of the time	11.2%
Always	15.1%

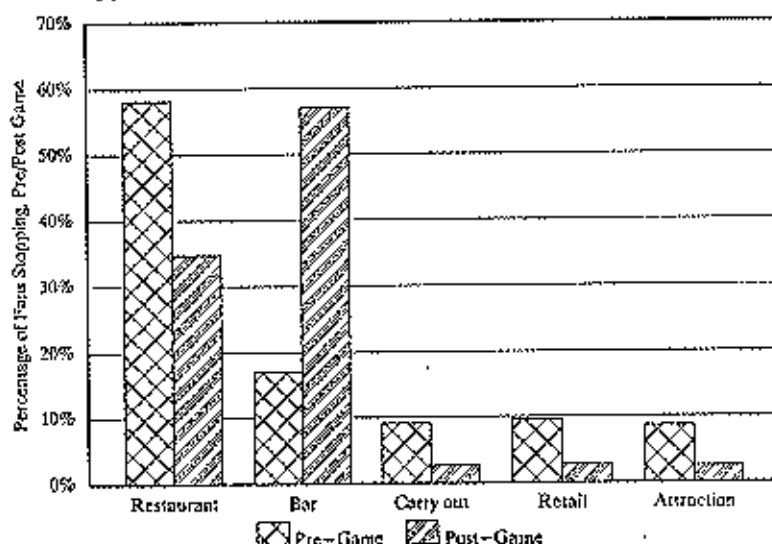
Type of Establishments Patronized

Restaurants were most frequently mentioned among pre-game stoppers and bars were most frequently mentioned among post-game stoppers. See Figure 8. A small, but significant, 9% of all those stopping patronized attractions, usually in the Inner Harbor.

Amount of Money Spent

The amount of money spent per party in pre-game stops varied widely -- the range is indicated in Table 6. The median amount

FIGURE 8
Type of Establishment Patronized Pre- and Post-Game



Harborplace's response to the new ballpark was to add amphitheatre performances before and after games and to extend hours of operation from 10 p.m. till midnight on Friday and Saturday.

TABLE 6
Pre-Game Spending per Party

Spending Category	Percentage of All Pre-Game Stoppers Spending this Amount
Under \$5.00	3.5%
\$6.00 - \$10.00	10.8%
\$11.00 - \$20.00	19.8%
\$21.00 - \$50.00	26.9%
\$51.00 - \$100.00	27.9%
\$100.00+	11.0%
Total	100.0%

spent was \$37.50 for a median party size of 3.1. Mean spending per capita for pre-game activities was \$12.12. An assumption that post-game spending would be 75% of pre-game spending resulted in a weighted average of \$10.82 per person/stop.

Mean and median spending among all "stoppers" was as follows:

	Spending per Person
Mean, all pre-game stops	\$12.12
Median, all pre-game stops	\$9.80
Mean post-game (assumed)	\$9.08
Weighted average of all stops	\$10.82

The mean spending of out-of-town fans was approximately double that of local fans. Mean spending by place of residence for all "Stoppers" was:

	Spending per person
Baltimore SMSA	\$9.00
Washington SMSA	\$9.60
Other Out-of-Town ¹⁵	\$18.54

Total Pre- and Post-Game Spending

For the 1992 season, pre- and post-game spending amounted to a \$12.4 million impetus to the Downtown economy. When parking expenses are added, the amount rose to \$13.6 million. Another \$1.0 million was spent in other parts of Baltimore City to bring the total Baltimore City pre- and post-game spending effect to \$14.6 million. See Table 7.

TABLE 7
Total Pre- and Post-Game Spending -- 1992
By Location of Expenditure (\$Millions)

Location of Spending	Discretionary	Discretionary with Parking
Downtown	\$12.36	\$13.64
Baltimore City (including Downtown)	\$13.31	\$14.59
Suburban Areas	\$2.59	\$2.59
Total SMSA	\$15.90	\$17.18

Camden Pub reported a 25% increase in business on game days.

"The discretionary travel part of our business is higher this year than any previous year, largely because of the ballpark." Rick Gittenberger, General Manager, Radisson Plaza Lord Baltimore, which reported that ballpark-related business accounted for an increase of between 700 and 1,000 room-nights per month.

OVERNIGHT SPENDING

Number of Overnightriders

The survey found that a surprisingly high 12% of all fans stayed overnight in the Baltimore area. Of all out-of-town fans (not from the Baltimore SMSA) 26% stayed overnight. Surprisingly, a little more than 10% of Washington area fans stayed overnight in Baltimore. Of all fans who are not from either the Baltimore area or the Washington area, 38.6% stayed overnight.

Downtown hotels captured the largest number of overnightriders and the majority of all those staying in hotels/motels.

The percentage of all overnightriders by type of accommodation was:

Downtown hotels	36.8%
Suburban hotels	28.1%
Family/friends	35.0%

Overnightriders' Purpose of Trip

Overnightriders were far more likely than daytrip fans to be in Baltimore for purposes other than (or in addition to) seeing the ballgame.

Among all overnightriders, the indicated "Purpose of the Trip" to Baltimore was:

See the ballgame	59.0%
Other purposes	20.0%
Combination of ballgame and other purposes	21.0%

In calculating room nights generated and the economic impact of overnightriders' spending, it was conservatively assumed that only respondents citing the ballgame as their primary purpose-of-trip should be counted.

The "other purposes" cited by overnightriders were:

Pleasure trip	50%
Business trip	18%
Convention/trade show	7%
Family/friends	15%
Other	10%

Overnightriders/Stop Downtown

Most overnightriders also made pre- or post-game stops in the Downtown area. The percentage of overnightriders who made pre- or post-game stops Downtown by their type of accommodation was:

A group of 20 people came on the train from New York City to see a ballgame and stayed overnight in a Downtown hotel. (Fan interview, 8/23/92)

The Days Inn sold 140 Orioles packages during the 1992 season.

A gentleman from San Francisco was here on business and took in a ballgame. He was surprised and delighted to find that he was sitting next to two groups from foreign countries, one from Canada and one from England. (Fan interview, 9/12/92)

Downtown hotel	74.0%
Suburban motel	55.0%
Family/friends	52.2%

Hotel Room Nights Generated

Using the following data and assumptions, hotel room night demand attributable to the Stadium can be calculated:

Average length of stay (from survey)	1.5 nights
Number person per party (from survey)	3 pers./party
Ballgame-purpose of trip (from survey)	59.0%
Total actual 1992 attendance (assumed)	3,450,000

The number of hotel room nights generated by fan overnights for the 1992 season was:

Downtown hotel room nights	44,944
Suburban hotel room nights	39,786
TOTAL HOTEL ROOM NIGHTS	84,730

Spending by Overnights

Spending by overnights can be calculated by using average daily spending figures from the Maryland Department of Economic and Employment Development.¹⁶

Total expenditures by overnights equalled almost \$40 million, the majority of which (\$22 million) was spent by fans staying in Downtown hotels. (See Table 8.)

TABLE 8
Expenditures of Overnights
By Type of Accommodation

Type of Accommodation	Number of Fans	Purpose Factor*	Dollars per Person per Night ¹⁶	Total Expenditures
Downtown Hotels	152,352	59.0%	\$165	\$22,247,000
Suburban Motels	116,334	68.4%	\$98	\$11,697,000
Family/Friends	144,900	51.8%	\$52	\$5,855,000
Total	413,586	-	-	\$39,799,000

*The percentage of fans indicating that the primary purpose of their trip was to see the ballgame.

"If Harborplace were the project that got Baltimoreans to rediscover the waterfront, then Oriole Park is the project that will get them to rediscover the rest of the City and take pride in it again." Ed Guntz, The Sun, 5/5/92.

FOOTNOTES

1. Maryland Department of Economic and Employment Development, The Economic and Fiscal Impacts of Baltimore Orioles 1992 Season In Maryland, October, 1992.

2. "Out-of-Town Fans" are those not residing in the Baltimore metropolitan area.

3. Memorial Stadium comparisons accomplished by applying 1984 fans' place of residence percentages to 1991 attendance levels. Source for 1984 data: Touche Ross & Co., New Stadium Site Evaluation, for Maryland Special Advisory Commission on Sports..., 1986; and Maryland Department of Economic and Community Development, The Economic Impact of Professional Sports on the Maryland Economy, 1985.

4. Twenty six percent (26%) overnight includes persons staying with family and friends.

5. Hotel room night figures and spending by overnighers have been calculated to include only overnighers who indicated that their primary "purpose of trip" was to see the ball game, which was 59% of all overnighers. For a more detailed explanation of the calculations see Chapter III, "Detailed Survey Results and Analysis of Spending."

6. Counts only out-of-town fans who indicated both that their "primary purpose of trip" was to see the ballgame and that they patronized Downtown establishments before or after games. This results in a figure of 522,000 "tourist" fans. Downtown tourism associated with Memorial Stadium is estimated to be 40,000. (1% of 4 million -- source Jeanne V. Beekhuis Co., Expenditures and Characteristics of Visitors the Inner Harbor..., 1988.) Thus, the net increase in ballpark-generated tourism is 482,000.

7. Maryland Department of Economic and Employment Development, The Economic Impact of Tourism In Maryland, 1988.

8. Source for 1984 spending: Maryland Department of Economic and Community Development, Economic Impact of Professional Sports on the Economy, 1985. The methodology for calculating Memorial Stadium 1991 spending data was as follows. MD, DECD out-of-stadium spending figures for 1984 were updated to 1991 correcting for both inflation and higher attendance, resulting in a total spending figure of \$14.4 million. This was revised upward by adjusting the overnight spending in two ways: 1) by assuming that 26% of out-of-state fans stayed overnight (the same % as the 1992 survey); 2) adjusting overnighers' daily spending figures to reflect the

same assumption used in the 1992/Camden calculations. The geographic distribution of 1991 spending was assumed to be:

	Pre/Post Game	Overnight
Downtown	33.3%	40%
Other City	33.3%	20%
Suburban	33.3%	40%

9.HOK, Inc., Baltimore Stadium Study, for Baltimore Corporate Stadium Task Force, 1985.

10.Note that the Peat Marwick Study does not define "out-of-town." It has been conservatively assumed that "out-of-town" means those not from either the Baltimore area or the Washington area. Source: Peat, Marwick, Mitchell & Co., Report on the Economic and Tax Impacts of the Camden Yards Stadium Development, for the Maryland Stadium Authority, March, 1987.

11.Baltimore City Department of Planning, published in Downtown Partnership, Demographic Overview of Downtown Baltimore, 1992.

12.Pittsburgh Pirates, Baseball: An Economic Impact on the Community, 1976.

13.Schaffer, William A. The Impact of Major League Baseball on Montreal, Georgia Institute of Technology, 1970.

14.Schaffer, William A. and Lawrence S. Davidson, Economic Impact of the Falcons on Atlanta, 1984.

15.Counts only pre-and-post game spending, not overnight spending.

16.Source: Maryland DEED, Economic Impact of Tourism in Maryland, 1988 inflated to 1992 dollars.

APPENDIX: METHODOLOGY

Fan Spending Survey

Fans were surveyed at three games in late August and early September. Games were chosen to be representative of weekdays and weekend dates. The surveying dates, number of responses, and their weight in the survey results was as follows:

Date	Time	Opponent	Number of Surveys	Represents	Weight
Sunday 8/23	1:35	Oakland	270	Sundays	16%
Wednesday 8/27	7:35	California	346	Weekdays	51.9%
Saturday 9/12	7:05	Milwaukee	366	Fridays and Saturdays	32.1%

Surveying was carried out at four entry area survey points. The volume of surveying accomplished at each entry area was approximately proportionate to the volume of fans who enter through the corresponding gates, according to data provided by the Orioles. Entry area surveying was carried out starting fifty minutes prior to the game and proceeded continuously until fifteen minutes after the start of the game. This schedule assured that the surveys would be proportionately representative to the arrival distribution patterns of fans, again, according to data provided by the Orioles.

A smaller number of surveys (27% of the total) were taken on the concourses during the game. The purpose of this was partly to enlarge the sample size for each game and partly to check whether the entry area surveying may have involved any survey bias. No significant bias was found.

The sample size (982) was large enough that, at a 95% confidence level, the error rate was only about 3%. Two survey forms were used (copies follow this section). The last three questions are different on the two surveys.

Restaurant/Bar Interviews

Managers of Downtown hotels, restaurants, and bars were interviewed in order to determine the breadth of stadium economic impact and the significance of the impact on individual establishments. Telephone interviews were conducted with restaurant and

bar managers in Downtown/Inner Harbor (south of Baltimore Street) Little Italy, South Baltimore, and Washington Boulevard. This roughly corresponded to the area one might expect that stadium patrons would park and walk to the ballpark.

The interviews did not include a number of areas which have, reportedly, been recipients of stadium business -- Mt. Vernon, Fells Point, and Mt. Washington in particular.

These surveys did not result in information which could be quantified and assembled to represent real economic impact figures.

Game _____
Area _____
Interviewer _____

BALLPARK ACCESS AND SPENDING SURVEY

1. WHERE IS YOUR PLACE OF RESIDENCE (Check any that apply)?
 - ☐ 1. Baltimore City
 - ☐ 2. Baltimore Co.
 - ☐ 3. Howard
 - ☐ 4. Carroll
 - ☐ 5. Harford
 - ☐ 6. Anne Arundel
 - ☐ 7. Montgomery/Prince George's Co.
 - ☐ 8. Washington D.C.
 - ☐ 9. Northern Va.
 - ☐ 10. Other Md.
 - ☐ 11. Southern Pa.
 - ☐ 12. Other out-of-State (specify) _____
2. WHAT IS THE NUMBER OF PEOPLE IN YOUR PARTY?

3. HOW DID YOU GET TO THE STADIUM AREA?
 - ☐ 1. Automobile
 - ☐ 2. Light Rail
 - ☐ 3. Subway
 - ☐ 4. MARC Commuter Train
 - ☐ 5. Bus-public
 - ☐ 6. Bus-charter
 - ☐ 7. Walk from (specify) _____
 - ☐ 8. Other (specify) _____
4. IF YOU DROVE TO THE STADIUM AREA, WHERE DID YOU PARK?
 - ☐ 1. Stadium lot
 - ☐ 2. Downtown garage/lot
 - ☐ 3. Garage/lot away from Downtown
 - ☐ 4. On-street parking
- 5.a. WAS THE PRIMARY PURPOSE OF YOUR TRIP TO SEE THE BALLGAME OR WERE YOU DOWNTOWN FOR SOME OTHER PURPOSE?
 - ☐ 1. See ballgame [Go to 6]
 - ☐ 2. Other purpose
 - ☐ 3. Combination of ballgame and other purposes
- b. WHAT WERE THE OTHER PURPOSE(S) OF THE TRIP (CHECK ANY THAT APPLY)?
 - ☐ 1. Pleasure trip/visit Inner Harbor
 - ☐ 2. Work Downtown
 - ☐ 3. Business Trip
 - ☐ 4. Convention/Trade Show
 - ☐ 5. Other, (specify) _____
- 6.a. DOES YOUR TRIP INVOLVE STAYING OVERNIGHT IN BALTIMORE?
 - ☐ 1. Yes
 - ☐ 2. No [Go to 7]
- b. IF "YES," WHERE ARE YOU STAYING?
 - ☐ 1. Downtown Hotel
 - ☐ 2. Suburban hotel/motel
 - ☐ 3. Family/friends
- c. NO. OF NIGHTS STAYING IN BALTIMORE?
 - ☐ 1. One
 - ☐ 2. Two
 - ☐ 3. Three
 - ☐ 4. Four or more
- 7.a. DID YOU STOP AT ANY ESTABLISHMENTS AFTER LEAVING HOME BUT BEFORE ARRIVING AT THE BALLPARK?
 - ☐ 1. Yes
 - ☐ 2. No [Go to 9]
- b. IF "YES," IDENTIFY THE AREA WHERE YOU STOPPED:
 - ☐ 1. Suburbs or outer areas
 - ☐ 2. Inner Harbor
 - ☐ 3. Little Italy
 - ☐ 4. Other Downtown
 - ☐ 5. Other Baltimore City (Fells Point, South Baltimore)
- c. IDENTIFY THE TYPE OF ESTABLISHMENT(S) PATRONIZED (CHECK ANY THAT APPLY):
 - ☐ 1. Restaurant
 - ☐ 2. Bar/Night Club
 - ☐ 3. Carry out or convenience grocery store
 - ☐ 4. Non-food retail establishment
 - ☐ 5. Attraction, such as, Aquarium, Science Center
- d. ABOUT HOW MUCH MONEY DID YOUR PARTY SPEND AT PRE-GAME STOP(S)?

- 8.a. DO YOU PLAN TO STOP AT ANY ESTABLISHMENTS AFTER LEAVING THE STADIUM?
 - ☐ 1. Yes
 - ☐ 2. Maybe
 - ☐ 3. No [Go to 9]
- b. IF "YES" OR "MAYBE," PLEASE IDENTIFY THE AREA WHERE YOU MAY STOP:
 - ☐ 1. Suburbs or outer areas
 - ☐ 2. Inner Harbor
 - ☐ 3. Little Italy
 - ☐ 4. Other Downtown
 - ☐ 5. Other Baltimore City (Fells Pt., S. Baltimore)
- c. IDENTIFY THE TYPE OF ESTABLISHMENT(S) WHERE YOU MAY STOP (CHECK ANY THAT APPLY):
 - ☐ 1. Restaurant
 - ☐ 2. Bar/Night Club
 - ☐ 3. Carry out
 - ☐ 4. Non-food retail establishment
 - ☐ 5. Attraction, such as, Aquarium, Science Center, etc.
9. RELATIVE TO MEMORIAL STADIUM DOES THE LOCATION OF THE NEW BALLPARK NEAR ATTRACTIONS, RESTAURANTS, AND OTHER FACILITIES MAKE YOU MORE OR LESS LIKELY TO ATTEND GAMES?
 - ☐ 1. More likely
 - ☐ 2. No difference
 - ☐ 3. Less likely
 - ☐ 4. Not Applicable
10. RELATIVE TO MEMORIAL STADIUM ARE YOU MORE LIKELY OR LESS LIKELY TO SPEND TIME IN THE STADIUM AREA BEFORE AND AFTER GAMES?
 - ☐ 1. More likely
 - ☐ 2. No difference
 - ☐ 3. Less likely
 - ☐ 4. Not applicable
11. COMMENTS: _____

Game _____
Area _____
Interviewer _____

BALLPARK ACCESS AND SPENDING SURVEY

1. WHERE IS YOUR PLACE OF RESIDENCE (Check any that apply)?

☐ 1. Baltimore City
☐ 2. Baltimore Co.
☐ 3. Howard
☐ 4. Carroll
☐ 5. Harford
☐ 6. Anne Arundel
☐ 7. Montgomery/Prince George's Co.
☐ 8. Washington D.C.
☐ 9. Northern Va.
☐ 10. Other Md.
☐ 11. Southern Pa.
☐ 12. Other out-of-State (specify) _____

2. WHAT IS THE NUMBER OF PEOPLE IN YOUR PARTY?

3. HOW DID YOU GET TO THE STADIUM AREA?

☐ 1. Automobile
☐ 2. Light Rail
☐ 3. Subway
☐ 4. MARC Commuter Train
☐ 5. Bus-public
☐ 6. Bus-charter
☐ 7. Walk from (specify) _____
☐ 8. Other (specify) _____

4. IF YOU DROVE TO THE STADIUM AREA, WHERE DID YOU PARK?

☐ 1. Stadium lot
☐ 2. Downtown garage/lot
☐ 3. Garage/lot away from Downtown
☐ 4. On-street parking

- 5.a. WHAT WAS THE PRIMARY PURPOSE OF YOUR TRIP TO BALTIMORE (DOWNTOWN)?

☐ 1. See ballgame [Go to 6]
☐ 2. Other purpose
☐ 3. Combination of ballgame and other purposes

- b. WHAT WERE THE OTHER PURPOSE(S) OF THE TRIP (CHECK ANY THAT APPLY)?

☐ 1. Pleasure trip/visit Inner Harbor
☐ 2. Work Downtown
☐ 3. Business Trip
☐ 4. Convention/Trade Show
☐ 5. Other, (specify) _____

- 6.a. DOES YOUR TRIP INVOLVE STAYING OVERNIGHT IN BALTIMORE?

☐ 1. Yes
☐ 2. No [Go to 7]

- b. IF "YES," WHERE ARE YOU STAYING?

☐ 1. Downtown Hotel
☐ 2. Suburban hotel/motel
☐ 3. Family/friends

- c. NO. OF NIGHTS STAYING IN BALTIMORE?

☐ 1. One
☐ 2. Two
☐ 3. Three
☐ 4. Four or more

- 7.a. DID YOU STOP AT ANY ESTABLISHMENTS AFTER LEAVING HOME BUT BEFORE ARRIVING AT THE BALLPARK?

☐ 1. Yes
☐ 2. No [Go to 8]

- b. IF "YES," IDENTIFY THE AREA WHERE YOU STOPPED:

☐ 1. Suburbs or outer areas
☐ 2. Inner Harbor
☐ 3. Little Italy
☐ 4. Other Downtown
☐ 5. Other Baltimore City (Fells Point, South Baltimore)

- c. IDENTIFY THE TYPE OF ESTABLISHMENT(S) PATRONIZED (CHECK ANY THAT APPLY):

☐ 1. Restaurant
☐ 2. Bar/Night Club
☐ 3. Carry out or convenience grocery store
☐ 4. Non-food retail establishment
☐ 5. Attraction, such as, Aquarium, Science Center

- d. ABOUT HOW MUCH MONEY DID YOUR PARTY SPEND AT PRE-GAME STOP(S)?

- 8.a. DO YOU PLAN TO STOP AT ANY ESTABLISHMENTS AFTER LEAVING THE STADIUM?

☐ 1. Yes
☐ 2. Maybe
☐ 3. No [Go to 9]

- b. IF "YES" OR "MAYBE," PLEASE IDENTIFY THE AREA WHERE YOU MAY STOP:

☐ 1. Suburbs or outer areas
☐ 2. Inner Harbor
☐ 3. Little Italy
☐ 4. Other Downtown
☐ 5. Other Baltimore City (Fells Pt., S. Baltimore)

- c. IDENTIFY THE TYPE OF ESTABLISHMENT(S) WHERE YOU MAY STOP (CHECK ANY THAT APPLY):

☐ 1. Restaurant
☐ 2. Bar/Night Club
☐ 3. Carry out
☐ 4. Non-food retail establishment
☐ 5. Attraction, such as, Aquarium, Science Center, etc.

12. ABOUT HOW MANY GAMES HAVE YOU ATTENDED THIS YEAR?

13. OF THE GAMES YOU HAVE ATTENDED HOW OFTEN HAVE YOU COMBINED THE BASEBALL GAME WITH SOME PRE-GAME OR POST-GAME ACTIVITIES IN OR NEAR DOWNTOWN BALTIMORE?

☐ Never
☐ Sometimes
☐ About half of the time
☐ Most of the time
☐ All of the time
☐ Not Applicable

14. COMMENTS: _____

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Baltimore City Planning Commission

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