



Photo: Sam Judge

Maximizing Maryland's Tourism Opportunities of the Chesapeake & Ohio Canal



The C&O Canal Experience

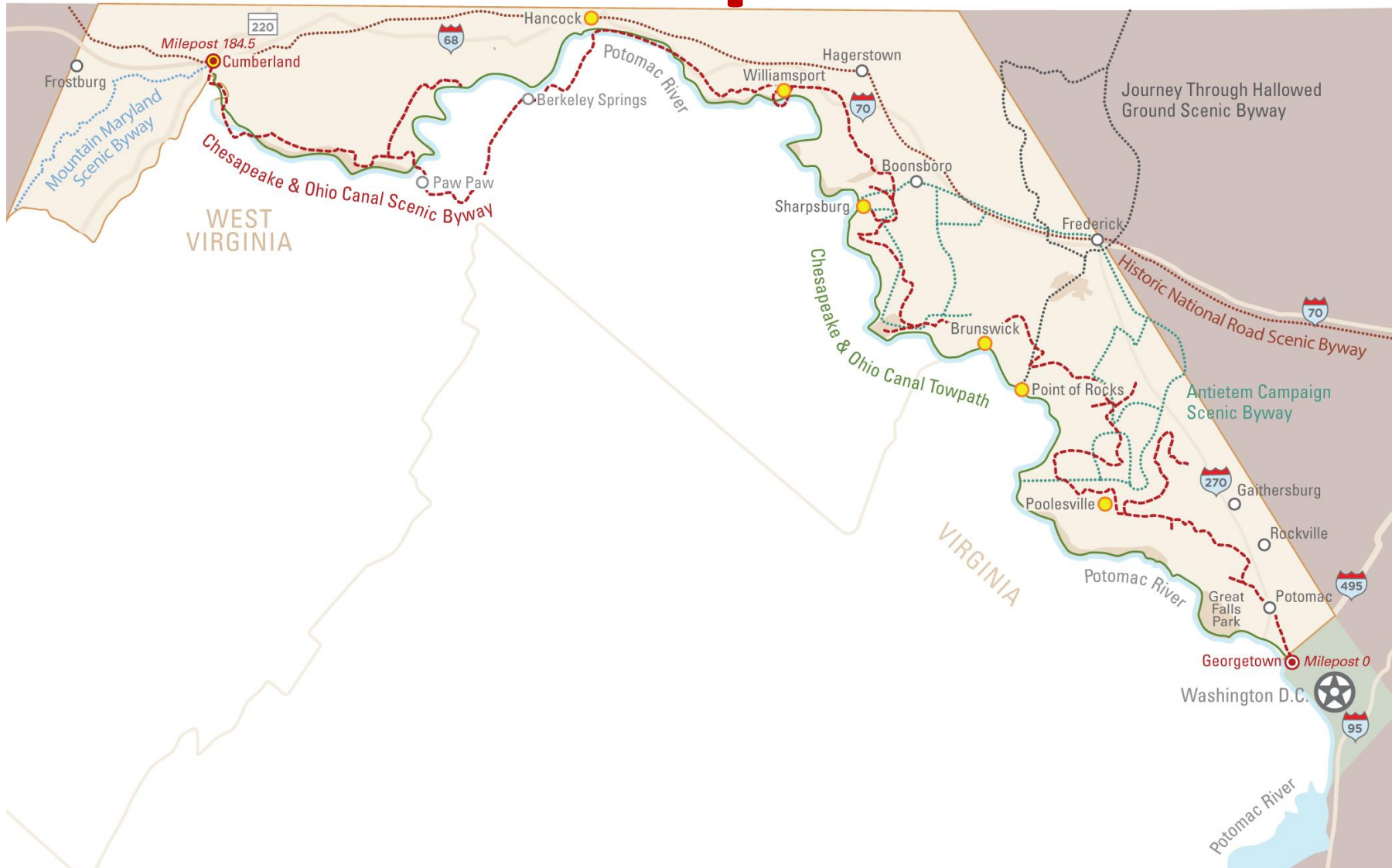
Experience the wonders of the C&O Canal and the vibrant region of dining, shopping and attractions around it. Where men and mules once plied the towpath, now hikers take in the sights and cyclists fly along the length of this marvel of engineering turned oasis for adventure.



Sam Judge

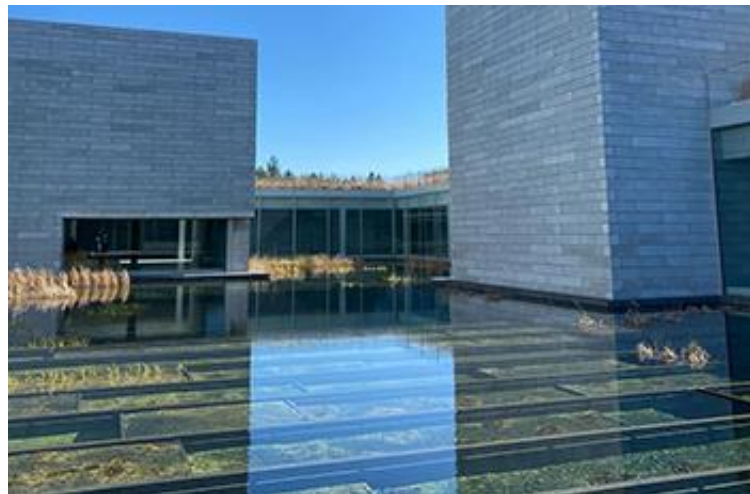


C&O Canal Experience



C&O Canal Experience

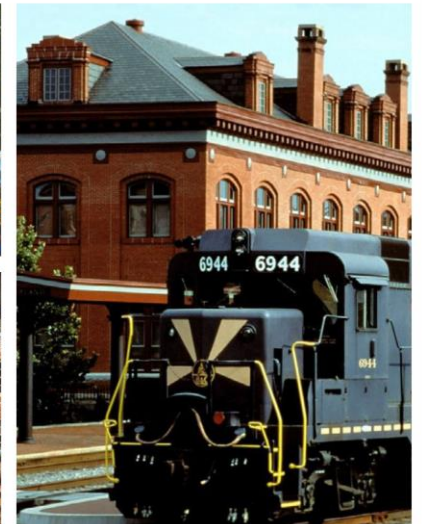
So Much Family Fun
Outdoor Adventures Await
Arts & Culture Along the Way
Journey Through History
Tastes Along the Way



Visitation to the C&O Canal National Historic Park

2019-2020 Visitation Analysis, Visitor Profile & Economic Impact Assessment

February 2021



About the Study

This research study was commissioned by the Maryland Office of Tourism Development. The work was conducted by Rockport Analytics, an independent market and economic research firm. **The goal of the analysis was to gain a comprehensive understanding of C&O Canal National Historic Park (NHP) visitor activity.** More specifically:

- (1) **To understand visitor volume to the C&O Canal NHP from those coming from outside the region**
- (2) **To understand C&O Canal NHP visitor behavior & preferences**
- (3) **To understand regional spending among visitors to the C&O Canal NHP**
- (4) **To understand the economic impact that these visitors have on the region and the state of Maryland**

Findings from the analysis can be leveraged to optimize the return on investment of scarce state and local marketing and planning resources by better geo-targeting visitors and creating meaningful and compelling campaigns to attract those to the region that will provide an outsized economic benefit. The economic impact results can also be used to give key stakeholders and policymakers a better understanding of the importance of the C&O Canal NHP, not only because of the cultural and quality of life benefits of the park, but as a driver of state and regional economic development.

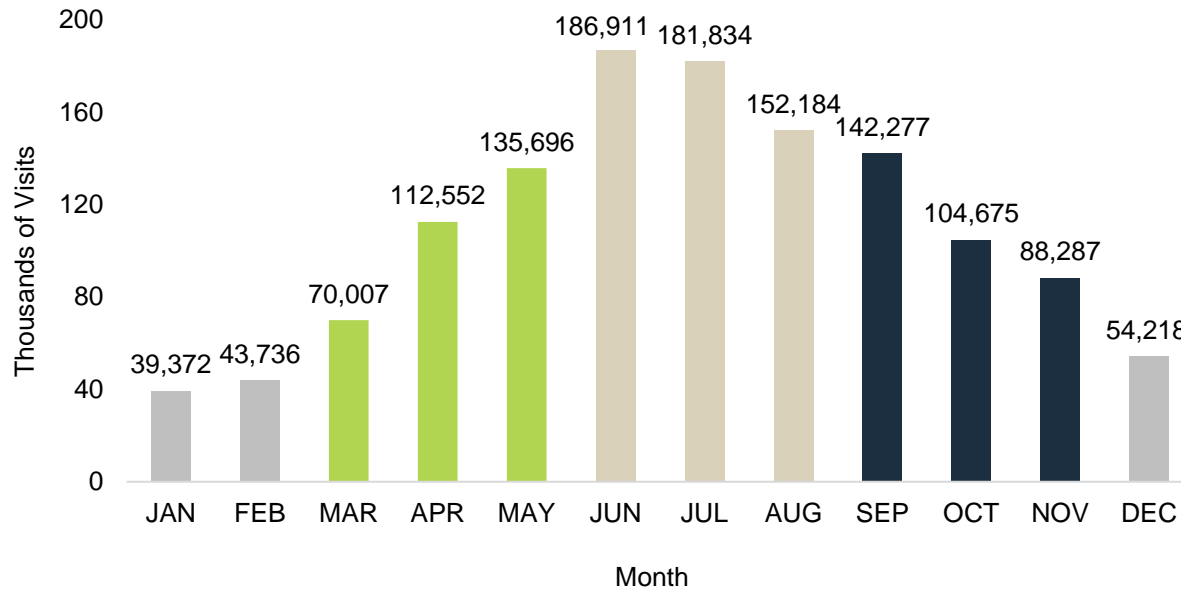
Defining a Park Visitor

For economic impact and visitor analysis, it is important that we look at true “visitors” to the Park. That is to say, those that are coming from outside of the immediate area. The economic activity that these individuals introduce into the region can be considered “net-new” and the impact created can be directly attributable to their visit. In this study we are conforming to the standard and widely-accepted industry definition of a **visitor as someone who travels over 50 miles one way to the park OR completes an overnight stay in the area.** Since we are interested in net-new dollars to the state of Maryland, any dollars spent by those traveling from neighboring states are included as well in our economic impact figures.

Likewise, from an economic impact perspective, it is important for us to identify visitors whose primary purpose for their trip into the area was the C&O Canal NHP. The spending of individuals who traveled to the area for another purpose but also happened to visit the park can not be directly attributable to the C&O Canal NHP.

1 in 4 Visitors to the C&O Canal NHP in 2019 Traveled More than 50 Miles

C&O Canal NHP Monthly Visitor Volume 2019



Visitation At A Glance

Estimated Number of Visitors: **1.3 million**

Average Distance Traveled: **354 Miles**

Average number of MD Counties Visited: **3.2**

Average MD Towns Visited: **3.6**

Average Length of Stay: **2.5 Days**

Source: US National Park Service (NPS), UberMedia, Rockport Analytics

According to the National Park Service, the C&O Canal National Historic Park welcomed 5.1 million visitors in 2019. Of this total, an estimated 25% or **1.31 million traveled from outside the immediate area for more than fifty miles to a location within the park's boundaries.** Three quarters of those who visited the park did not travel more than fifty miles and in this study they are classified as "residents". Although visitors and residents both enjoy the amenities that the C&O Canal NHP has to offer, our study focuses mainly on visitors as their spending can be considered "net-new" to the local economy. Economic impact analysis assumes that any spending by residents in the local economy would have occurred regardless of their visit to the park.

Top 25 Metro Areas of Origin

| Metro Area of Origin of Visitors Traveling 50+ Miles | Share of Visitation | Estimated Volume |
|--|---------------------|------------------|
| Washington, DC (Hagerstown, MD) | 19.8% | 250,280 |
| New York, NY | 6.7% | 84,763 |
| Baltimore, MD | 5.4% | 68,201 |
| Philadelphia, PA | 4.8% | 60,453 |
| Pittsburgh, PA | 3.7% | 46,867 |
| Harrisburg-Lancaster-Lebanon-York, PA | 3.0% | 37,809 |
| Norfolk-Portsmouth-Newport News, VA | 2.5% | 31,142 |
| Richmond-Petersburg, VA | 2.4% | 30,598 |
| Raleigh-Durham (Fayetteville), NC | 2.1% | 26,132 |
| Atlanta, GA | 1.8% | 23,205 |
| Salisbury, MD | 1.7% | 21,232 |
| Boston, MA (Manchester, NH) | 1.7% | 21,098 |
| Chicago, IL | 1.5% | 19,007 |
| Charlotte, NC | 1.5% | 18,407 |
| Roanoke-Lynchburg, VA | 1.4% | 17,232 |
| Los Angeles, CA | 1.3% | 16,916 |
| Miami-Fort Lauderdale, FL | 1.3% | 16,545 |
| Orlando-Daytona Beach-Melbourne, FL | 1.2% | 15,346 |
| Tampa-St. Petersburg (Sarasota), FL | 1.1% | 14,486 |
| Cleveland-Akron (Canton), OH | 1.1% | 14,391 |
| Johnstown-Altoona, PA | 1.1% | 14,060 |
| Wilkes Barre-Scranton, PA | 1.0% | 12,695 |
| Dallas-Ft. Worth, TX | 1.0% | 12,048 |
| Harrisonburg, VA | 0.9% | 11,306 |
| Houston, TX | 0.8% | 10,715 |

- A significant share of visitor volume comes from regional markets like Baltimore, Washington DC and Philadelphia. This volume includes only visitors that traveled more than 50 miles.
- In 2019, more than 75,000 visitors traveled from Johnstown-Altoona, Pittsburgh, PA, and Cleveland-Akron (Canton), OH, all three metro areas are located close to the park's western-most counties of Allegany and Washington.
- Among the top 25, we also see travel from metro areas with short non-stop flights to airports in the region (BWI, Dulles, Reagan National) such as Atlanta, Boston, Charlotte and Chicago. In 2019 these four metro areas, collectively, brought in an estimated 82,000 visitors.
- Metro areas in Texas and Florida are also well represented in the top 25. In 2019, an estimated 69,000 visitors came from Miami-Fort Lauderdale, Orlando-Daytona Beach-Melbourne, Tampa-St. Petersburg, Sarasota and Dallas-Ft. Worth and Houston.

C&O Canal NHP Visitor Snapshot

Trip Behavior



Day Trip: **39%**
Overnight: **61%**
Avg Days: **2.5**



Avg Party Size: **3.1**
Max: **10**



First Visit: **62%**
Repeat Visit: **38%**
Top Season
Summer: **33%**



Primary Reason
For Visit:
28%
*Spend Time with
Friends & Family*

Primary
Accommodations



Hotel/Motel, 51%

Lodge/
Cabin/
Cottage,
14%

Bed &
Breakfast,
13%

Other Locations Visited

WV

Visited: 15%
Location of
Lodging: 4%

VA

Visited: 34%
Location of
Lodging: 14%



MD

Visited: **83%**
Location of
Lodging: **71%**

DC

Visited: 31%
Location of:
Lodging 11%

Top 3 MD Towns Visited

| | |
|------------|-----|
| Frederick | 25% |
| Hagerstown | 22% |
| Potomac | 19% |

Top Activities



68%
Hiking/
Walking



53%
Sightseeing



42%
Shopping



40%
Dinning
Locally

Top Information Sources

Internet Search **43%**

Recommendation
from Others **42%**

NPS Website **38%**

Previous Visit **22%**

Demographics



Male: **41%**
Female: **58%**
Other: **1%**



Married: **55%**
Single: **40%**
Other: **5%**



Automobile*: **94%**
RV: 8%
Bicycle: 7%
Bus & Air: 5%



Avg HH
Income
\$96K



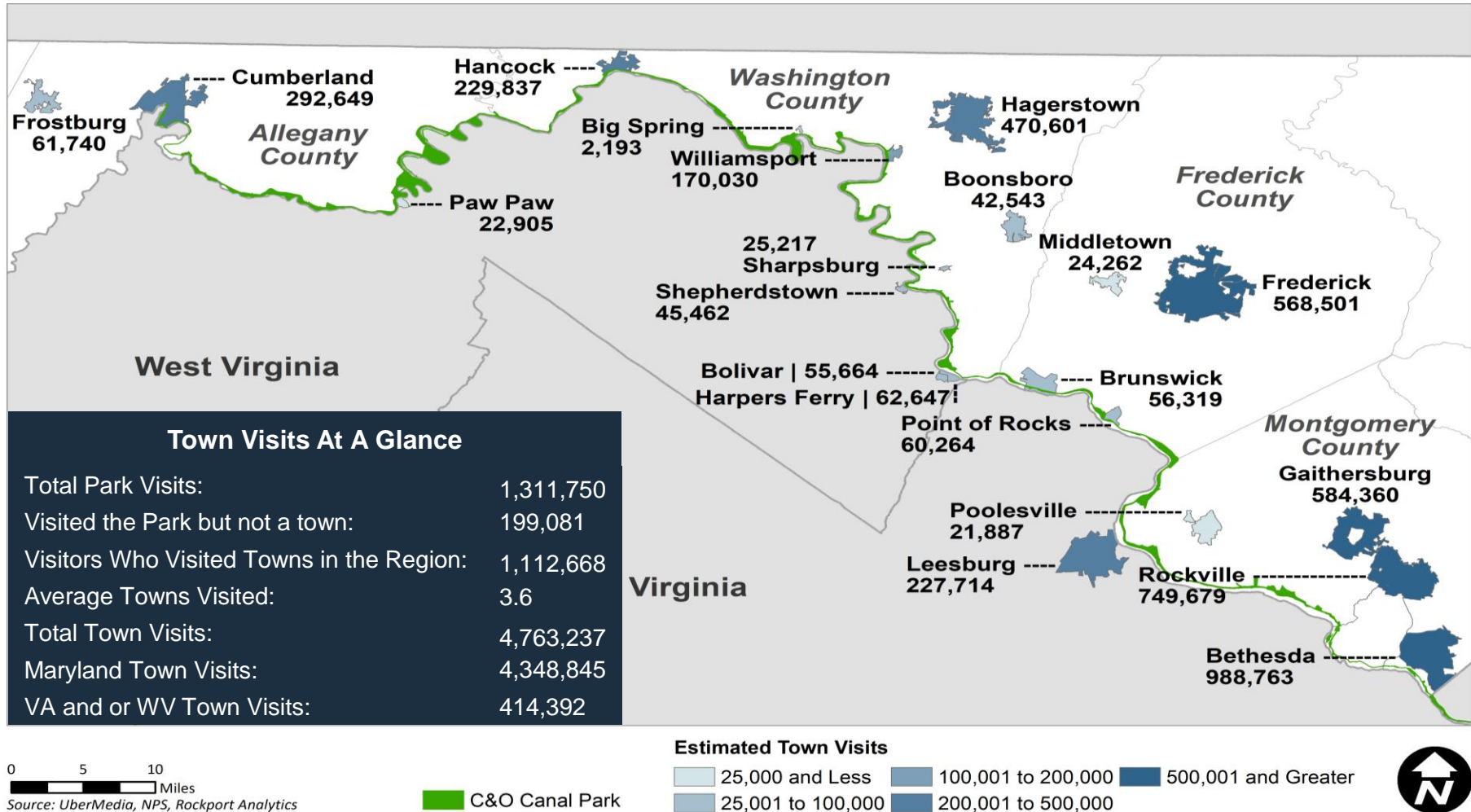
Avg Age
40

Top 15 Activities Enjoyed Among C&O Canal NHP Visitors



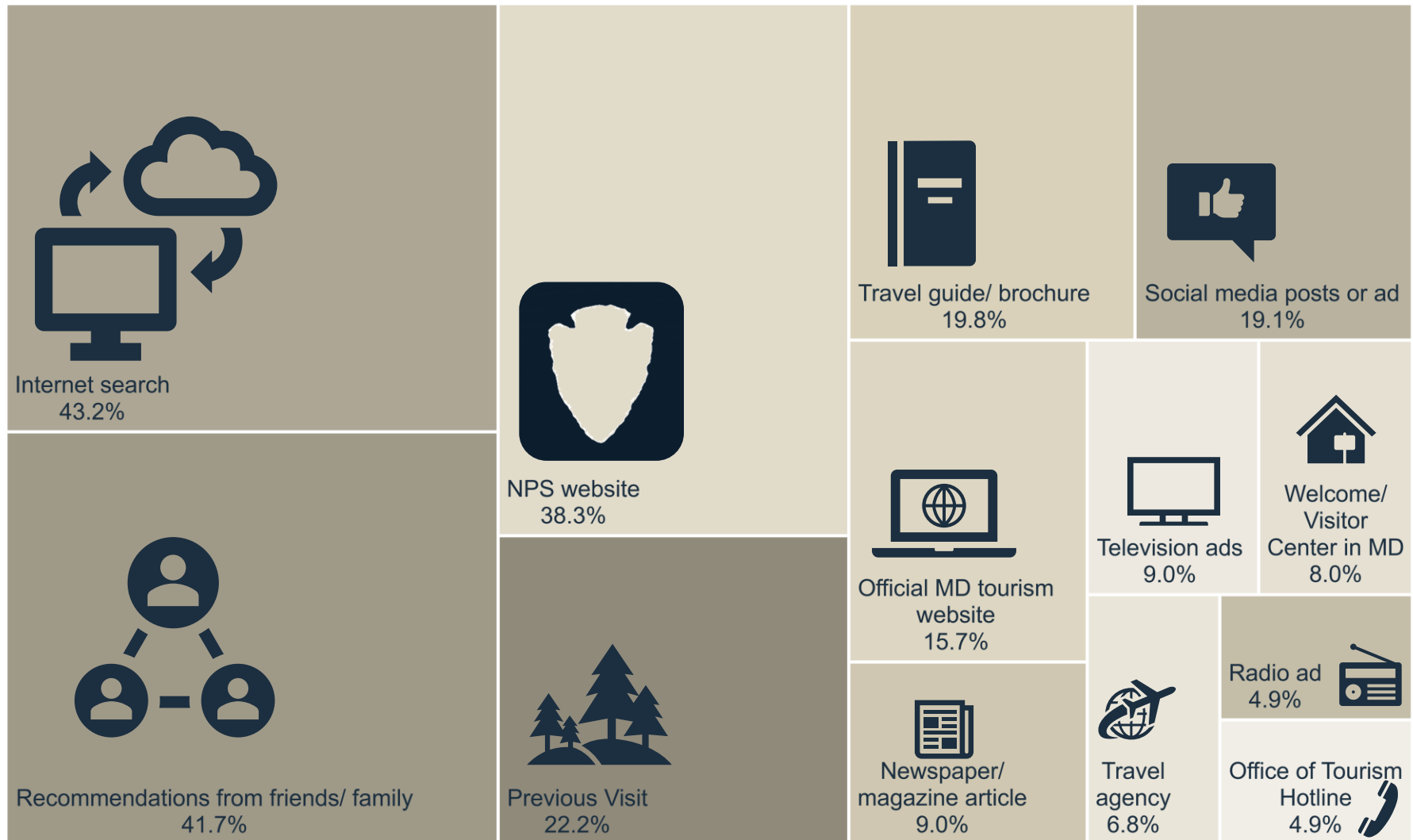
Q: Please select the activities that members of your party participated in, either in or outside the C&O Canal NHP National Park?
N: 327

C&O Park Visitors Generated 4.3 Million Visits to Maryland Towns/Cities in 2019



In our analysis we used geo-location data to break the park into four sections that correspond to the Maryland counties of Allegany, Frederick, Montgomery and Washington. Pages 17 -22 of the report profile each section of the park and provide more detailed information about the towns/cities and counties visited by visitors from each section of the park.

Information Sources Used to Plan Visit



Q: Please select the activities that members of your party participated in, either in or outside the C&O Canal NHP National Park?

N: 327

Visitors to the C&O Canal NHP in 2019 Spent an Average of \$105 per Day

The spending estimates included in this study only account for the spending of visitors who (1) traveled at least 50 miles one way to visit the C&O NHP or (2) stayed overnight in the region. Further, from an economic impact standpoint, it is important to eliminate the spending of park visitors who were in the area primarily for other purposes but also happened to visit the park. The estimated visitor spending and associated economic impact measures in this analysis include only that of “main purpose¹” visitors, i.e., those whose primary reason for visiting the area was to visit the C&O Canal National Historic Park.

Lodging



Per Day: \$34.5
Per Trip: \$110.4
Per Party: \$316.7
Total \$102 Million

Food & Beverage



Per Day: \$19.5
Per Trip: \$62.2
Per Party: \$178.7
Total: \$57 Million

Shopping & Other Retail



Per Day: \$17.5
Per Trip: \$56
Per Party: \$160.8
Total: \$52 Million

Recreation & Entertainment



Per Day: \$20.1
Per Trip: \$64.3
Per Party: \$184.5
Total: \$59 Million

Transportation

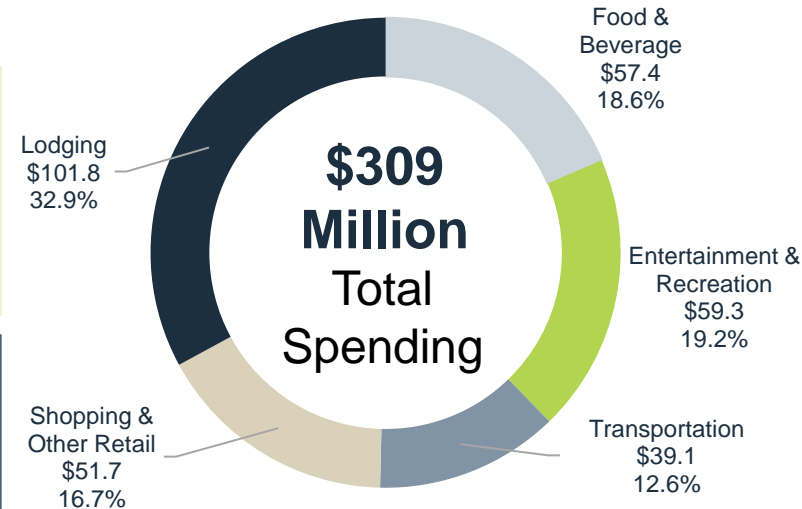


Per Day: \$13.3
Per Trip: \$42.4
Per Party: \$121.6
Total: \$39 Million

Visitor Spending Averages

Spend Per Day: **\$105**
Spend Per Trip: **\$335.3**
Spend Per Party: **\$962.4**

2019 C&O Canal NHP Visitor Spending by Category (\$ Millions)



Source: D.K.Shifflet, Rockport Analytics

¹70% of visitors identified as “main purpose” visitors, *Rockport Survey of C&O Park Visitors*, Fall 2020

C&O Canal NHP Economic Contribution by the Numbers



1.3 M

Visitors

Avg Party Size: 2.9
Avg Towns Visited: 3.6
Avg MD Counties Visited 3.2



\$309 M

Visitor Spending

Spend Per Day: \$105
Spend Per Trip: \$335
Spend Per Party: \$962



\$83 M

Total Visitor-Initiated Taxes

Federal: \$36 M
State: \$26 M
Local: \$20 M



3,902

Total Jobs Supported
(Full & Part-Time)



\$156 M

Total Wages & Salaries Paid



\$254 M

Total Economic Contribution
(Value Added)



Washington County

Daniel P. Spedden, President
Visit Hagerstown



Marketing the 50th Anniversary



- Began in 2017: Submitted a bid to host International Waterways' World Canal Conference – and were awarded it for 2021;
- In 2019: Saw the fruition of the restoration project at Cushwa Basin – the only in North America with these features; a restored Aqueduct, Lock Bridge, Lock Keeper's House all within 1/4 mile of one another;
- Provided businesses along the Canal Towns with rack cards, bulletin boards and publicity to promote things to do: dining, shopping, lodging and services;
- Celebrated the C&O Canal & 50th Anniversary on the covers of our Visitor Guides for 2020 and 2021;
- COVID...Our location during the pandemic instigated visitors to come for outdoor recreation and easy weekend trips;
- Utilized the C&O National Scenic Canal Byway as a method for visitors to take day trips, and venture from the Canal and into our Canal Towns, to explore Family-friendly, History, Culinary, Arts & Entertainment, and Recreation activities;



Marketing the C&O Canal Experience

- The 50th Anniversary prompted the State Tourism Office to commission a logo branding of the “C&O Canal Experience”: a new micro-region to promote the Canal as a destination of high value;
- Partnered with the C&O Canal Trust and Canal Towns Association to promote the Canal Libations Trail and a Sweet & Savory Guide;
- This new branding created a cohesive partnership between the State and all 4 counties. We leveraged it to generate dozens of print and online articles, nationally and regionally;
- Partnered with each county to do co-op ads in the Washington Post, AAA Magazine, Blue Ridge Outdoors, Recreation News and others as a region.

C&O Canal
EXPERIENCE

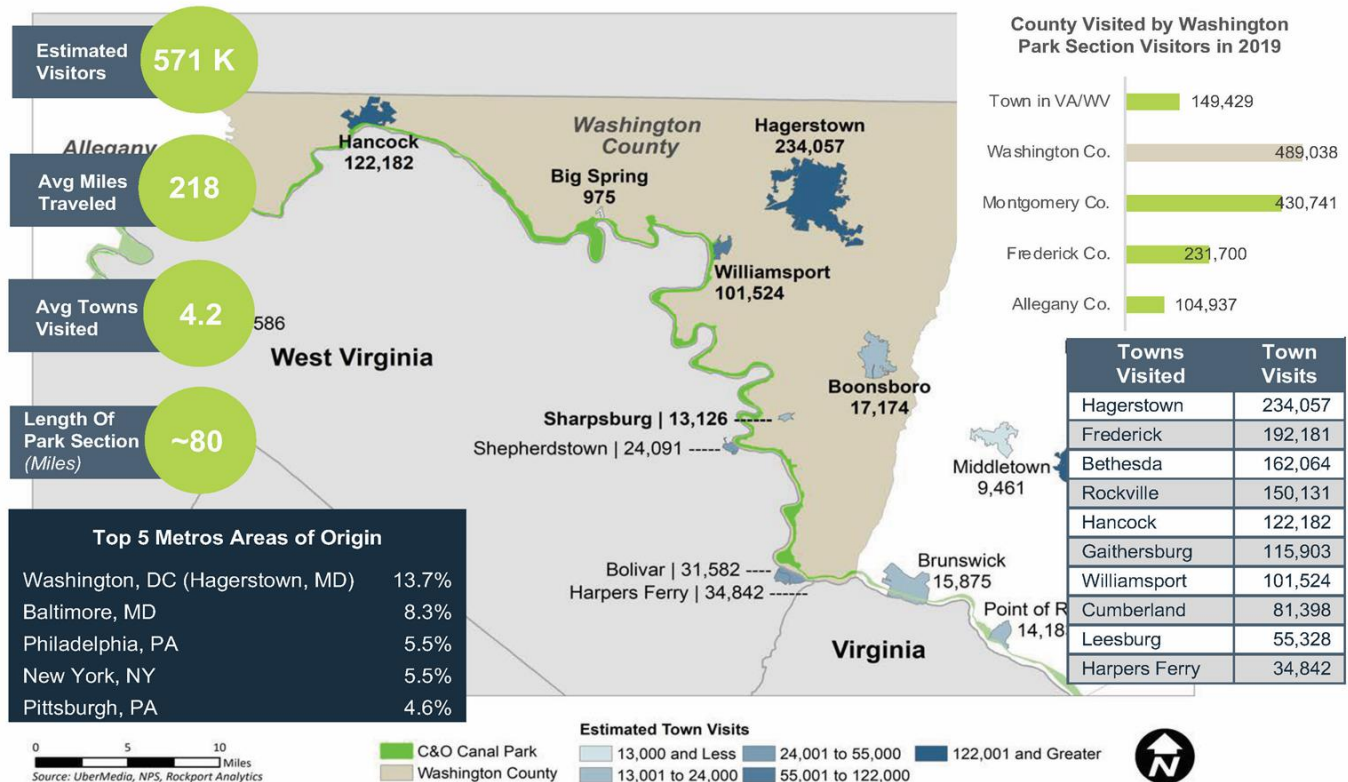


Our Survey Said



ROCKPORT
ANALYTICS

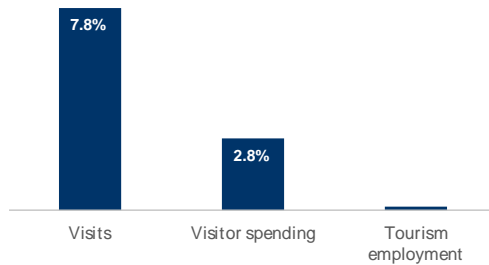
The Washington County Section of the C&O Canal NHP Received 43.5% of Visits



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WASHINGTON COUNTY HIGHLIGHTS AND VISITATION

Cumulative Growth in Key Indicators, 2015-2019



2019:
Our Key
Performance Index
for 2021 and Beyond

Washington County visitor levels

| | 2015 | 2016 | 2017 | 2018 | 2019 |
|-----------------------------------|----------------|----------------|----------------|----------------|----------------|
| Total visitors (thousands) | | | | | |
| Day | 675.9 | 672.3 | 667.9 | 712.6 | 723.8 |
| Overnight | 584.9 | 599.7 | 607.8 | 622.8 | 636.0 |
| Total | 1,260.9 | 1,272.0 | 1,275.7 | 1,335.4 | 1,359.8 |
| | | 0.9% | 0.3% | 4.7% | 1.8% |

Source: Tourism Economics

Visits by type, 2019



Source: Tourism Economics

VISITOR SPENDING

Visitor spending in Washington County

Millions of dollars

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2019 Growth | 2015-2019 CAGR |
|------------------|----------------|----------------|----------------|----------------|----------------|-------------|----------------|
| Lodging* | \$52.8 | \$52.6 | \$52.9 | \$52.2 | \$53.2 | 1.8% | 0.2% |
| Food & beverages | \$70.2 | \$71.0 | \$70.5 | \$72.5 | \$75.2 | 3.7% | 1.7% |
| Retail | \$57.1 | \$55.2 | \$55.0 | \$56.5 | \$56.7 | 0.3% | -0.2% |
| Recreation | \$33.9 | \$36.4 | \$36.4 | \$37.6 | \$37.7 | 0.4% | 2.7% |
| Transportation** | \$48.0 | \$41.5 | \$42.4 | \$46.4 | \$46.5 | 0.3% | -0.8% |
| Total | \$262.0 | \$256.7 | \$257.3 | \$265.2 | \$269.3 | 1.6% | 0.7% |

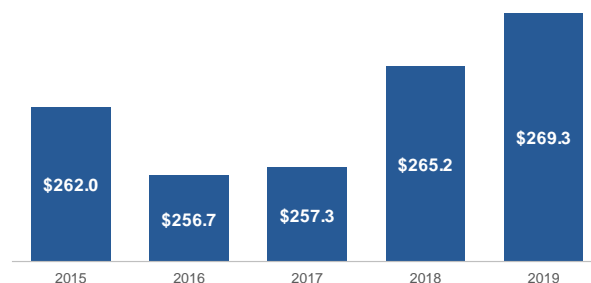
* Lodging includes 2nd home spending

** Transportation includes both ground and air transportation

Source: Tourism Economics

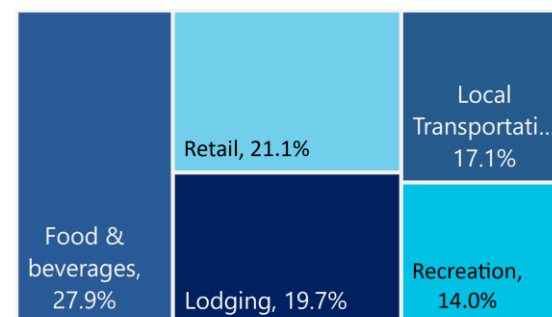
Visitor spending timeline

Millions of dollars



Visitor spending by category

Percent of total

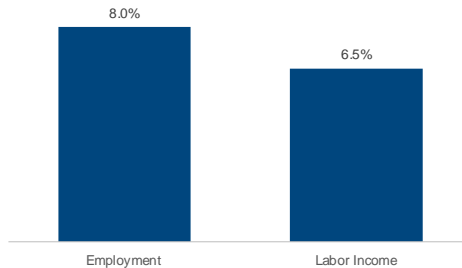


2019:
Our Key Performance
Index for 2021 and
Beyond



ECONOMIC IMPACTS

Tourism share of county economy



Source: Tourism Economics, Bureau of Labor Statistics

2019: Our Key Performance Index for 2021 and Beyond

Visitor impacts in Washington County

Employment in units, Income and taxes in millions of dollars

| | 2015 | 2016 | 2017 | 2018 | 2019 | % Chg |
|---------------------|---------|---------|---------|---------|---------|-------|
| Employment | | | | | | |
| Direct | 3,428 | 3,435 | 3,394 | 3,394 | 3,432 | 1.13% |
| Total | 5,275 | 5,281 | 5,203 | 5,202 | 5,252 | 0.97% |
| Share of State | 2.41% | 2.38% | 2.32% | 2.30% | 2.32% | |
| Labor Income | | | | | | |
| Direct | \$83.5 | \$86.8 | \$87.1 | \$90.3 | \$94.7 | 4.90% |
| Total | \$163.8 | \$170.9 | \$171.1 | \$176.7 | \$184.9 | 4.62% |
| Share of State | 1.77% | 1.76% | 1.70% | 1.71% | 1.74% | |
| | 2015 | 2016 | 2017 | 2018 | 2019 | % Chg |
| Tax revenues | | | | | | |
| Federal | \$34.07 | \$35.21 | \$35.30 | \$36.44 | \$37.93 | 4.06% |
| State and Local | \$38.02 | \$37.78 | \$38.15 | \$39.84 | \$40.90 | 2.66% |
| Hotel | \$2.05 | \$2.03 | \$2.06 | \$2.16 | \$2.30 | 6.55% |
| Total | \$72.09 | \$72.99 | \$73.45 | \$76.28 | \$78.82 | 3.33% |

Source: Tourism Economics, Maryland Department of Revenue



Canal Towns Partnership

For Profit Business Engagement

C&O Canal National Historical Park 50th Anniversary

C&O Canal Libations Trail

- ❑ Developed plan for a canal themed libations trail
- ❑ Engaged 14 breweries/distilleries in joining the trail
- ❑ Assisted many with product name development
- ❑ Shared MD Tourism's promotional material
- ❑ Promoted on website and social media





C&O Canal Sweet and Savory Trail

- ❑ Recruited 17 eateries in the towns to offer a canal themed menu item
- ❑ Assisted with ideas for product names
- ❑ Compiled list of participants
- ❑ Promoted the offerings through website and social media

