

Visitation to the C&O Canal National Historical Park

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

Full Report – February 2021

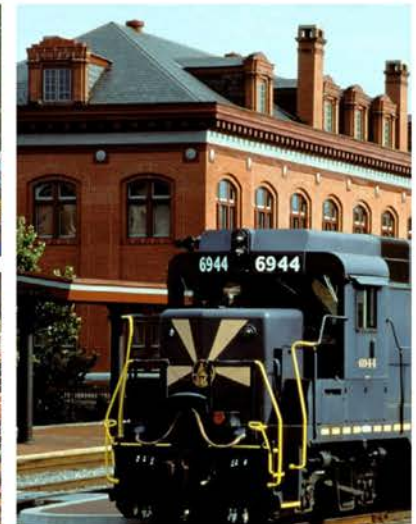


Table of Contents



Background & Methodology

3

Visitation to the C&O Canal Park & Surrounding Area

7

Profile of C&O Canal Park Visitors

21

Visitor Spending & Economic Impact Summary

39

Economic Impact Detailed Results

44

Summary of Findings

50

Glossary of Key Economic Terms

54

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 Historical 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.

Survey Methodology

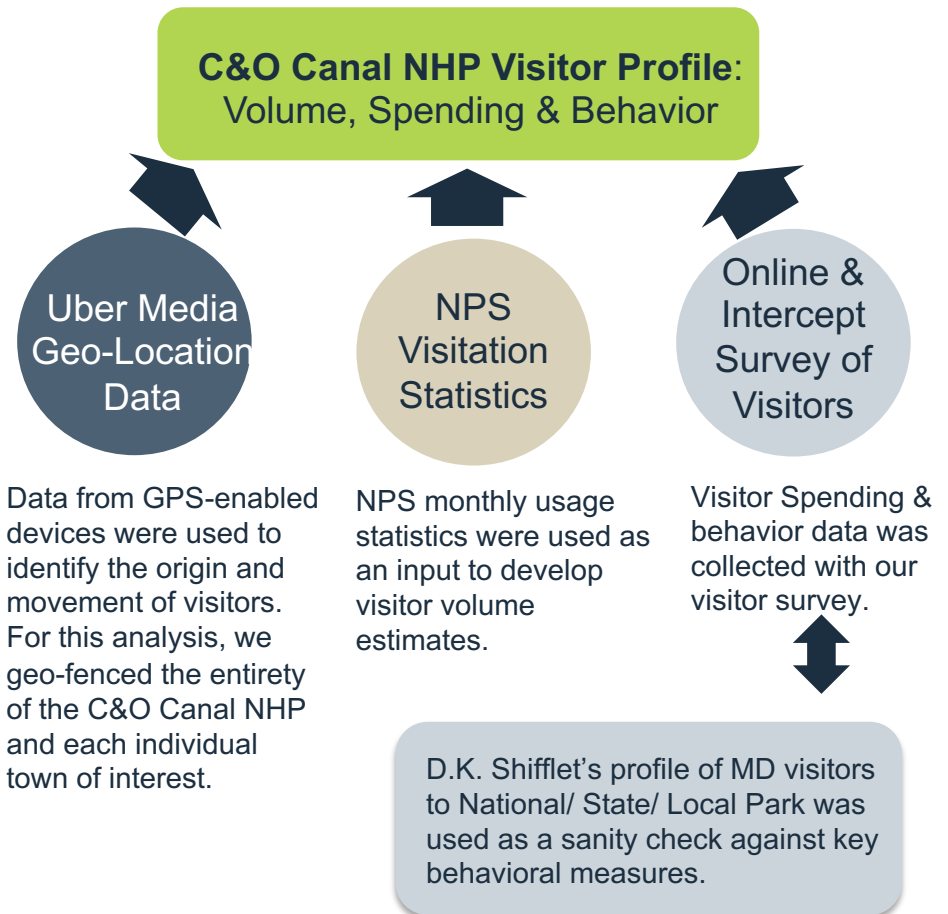
This report presents the findings of a comprehensive profile of visitors to the C&O Canal NHP conducted by Rockport Analytics on behalf of the Maryland Office of Tourism Development. Behavioral data from visitors were collected through a combination of intercept surveys and online surveys.

The in-person intercept survey was administered on September 12 at four locations along the C&O Canal NHP in Maryland; 1) Great Falls in Montgomery County, 2) Point of Rocks in Frederick County, 3) Lockhouse 44 in Washington County and 4) Canal Place in Allegany County.

Online surveys were fielded in 2020 from October 5 to November 7. The online survey screened for residents ages 18 and over who had visited the C&O Canal NHP during 2019. The survey also targeted individuals from Virginia, Maryland, West Virginia and Pennsylvania who had traveled more than 50 miles to the destination or who had completed an overnight stay during the trip. Results from this analysis are based on responses from 327 completed surveys and the margin of error is ± 4.5 at a 90% confidence level.

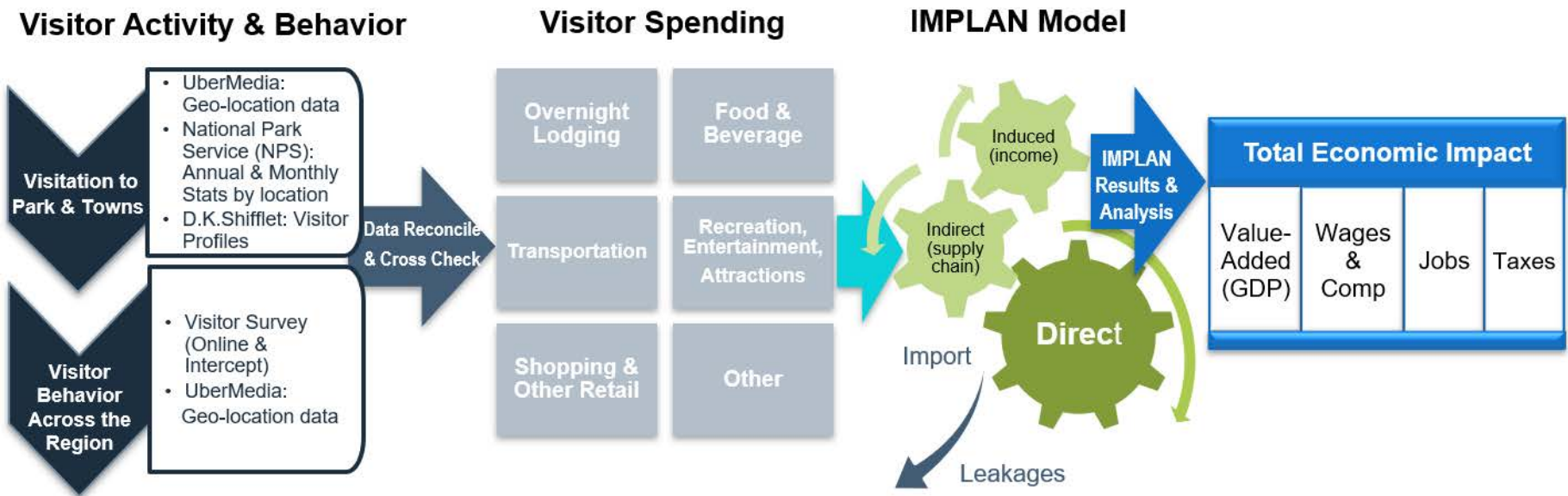
Data Sources

In order to formulate a holistic understanding of C&O Canal NHP we utilized a number of data inputs in our analysis



Economic Impact Modeling

An input/output model is employed to assess how visitor expenditures flow through the state and local economies. Rockport Analytics has chosen the IMPLAN model for Maryland and C&O Canal NHP region, which includes Allegheny County, Washington County, Frederick County and Montgomery County. IMPLAN is a non-proprietary economic model that has become the de facto standard for economic impact assessments in the United States (www.implan.com). This model is critical to measuring the direct, indirect and induced impacts of visitation to the region. IMPLAN also measures how much of each tourism dollar remains in the state and local economies. Total visitation-initiated expenditures generally exceed the direct impact of those expenditures. This is because not all goods and services purchased by visitors are supplied by firms located in the local area. The IMPLAN model accounts for these import “leakages”² to suppliers located outside of the region. Generally, the more diversified a local economy, the lower the import leakages and the higher the retention and multiplier effect of attraction-initiated expenditures.



² Leakages refer to goods and services that must be imported into the county due to insufficient in-state capacity.

About The Maryland Office of Tourism Development

The Office promotes Maryland as a travel destination for domestic and international tourists. It promotes the state's attractions, accommodations and events through its website, VisitMaryland.org, annual publication, Destination Maryland and two newsletters, (distributed bi-weekly), Visit Maryland Now and the MARYLAND Insights for the tourism and industry partner. Additionally, the staff advises third-party sellers of travel such as travel agents, and tour operators. There is a public relations staff that has assisted travel writers to generate nearly \$15.5 million in destination publicity. The office also manages eight Welcome Centers. The Office of Tourism Development had formed as the Tourism Development Office by 1981 and reorganized within the Division of Tourism, Film, and the Arts under its present name in 1996. The office has approximately 20 employees.



About Rockport Analytics

Rockport is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. They provide fast, nimble service in a transparent environment.

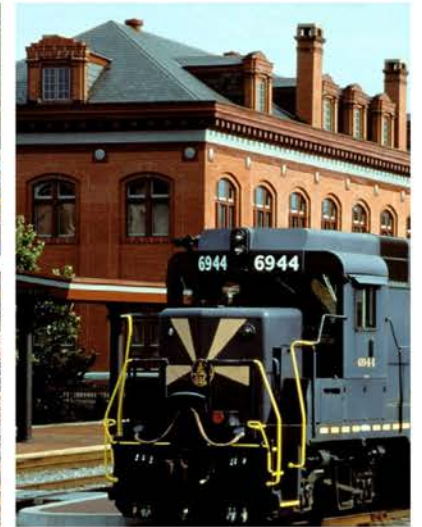
Capabilities include:

- Market Analysis and Forecasting
- Visitor Research
- Market Modeling and Decision Support Tools
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external
- Economic Impact Assessment



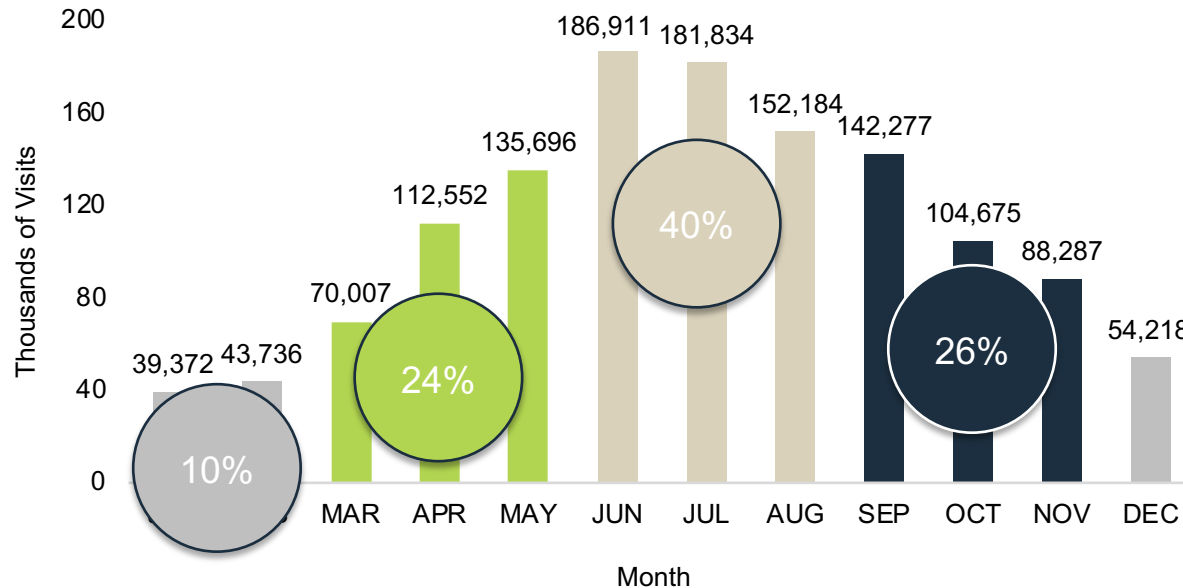
2019-2020 Visitation Analysis, Visitor Profile & Economic Impact Assessment

C&O Canal Park Regional Visitation



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**

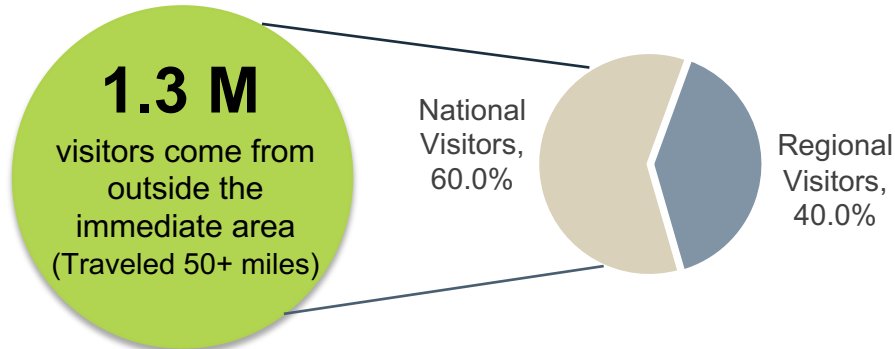
Average number of MD Counties Visited: **3.2**

Average MD Towns Visited: **3.6**

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

According to the National Park Service, the C&O Canal National Historical 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.

4 in 10 Visitors to the C&O Canal NHP in 2019 Come from Neighboring States



State of Origin	Share of Visitation	Estimated Volume	Average Distance Traveled (Miles)
Visitor (Traveled More than 50 miles)	25.6%	1,311,750	354
National Visitors	60.0%	757,495	415
Regional Visitors (visitors who traveled more than 50 miles from MD and neighboring states)	40.0%	504,279	88
Pennsylvania	34.5%	174,042	119
Virginia	30.7%	154,638	113
Maryland	22.7%	114,494	76
Washington, DC	1.9%	9,549	70
Delaware	3.3%	16,485	115
West Virginia	7.0%	35,070	123

- Of the estimated 1.3 million visitors who traveled more than 50 miles to the C&O Canal NHP, about 4 in 10 visitors, or more than half a million (504,000), can be considered regional visitors, traveling from Maryland and states that share a border with Maryland. About 60% of visitors, or nearly 757,500, came from other parts of the US.
- Of these “regional visitors”, 88% traveled from, Pennsylvania (174,042), Virginia (154,638) and Maryland (114,494) and they traveled an average of 106 miles.
- The length of the C&O Canal NHP allows it to be easily accessible to a large number of regional visitors, not just those in bordering states. The map on the following page shows that nearly half of Ohio is within a 300-mile radius from the park and almost all of Indiana is within a 500-mile radius. Furthermore, densely populated areas to the east such as New Jersey and New York City are also within a 300-mile radius.
- Nearly 73%, or an estimated 956,350 visitors, traveled between 50 and 500 miles to visit the park and more than 355,400, or 27%, traveled from outside 500 miles.*

*Includes an estimated 45,578 international visitors

The C&O Canal NHP Also Attracts Visitors from Across the Country

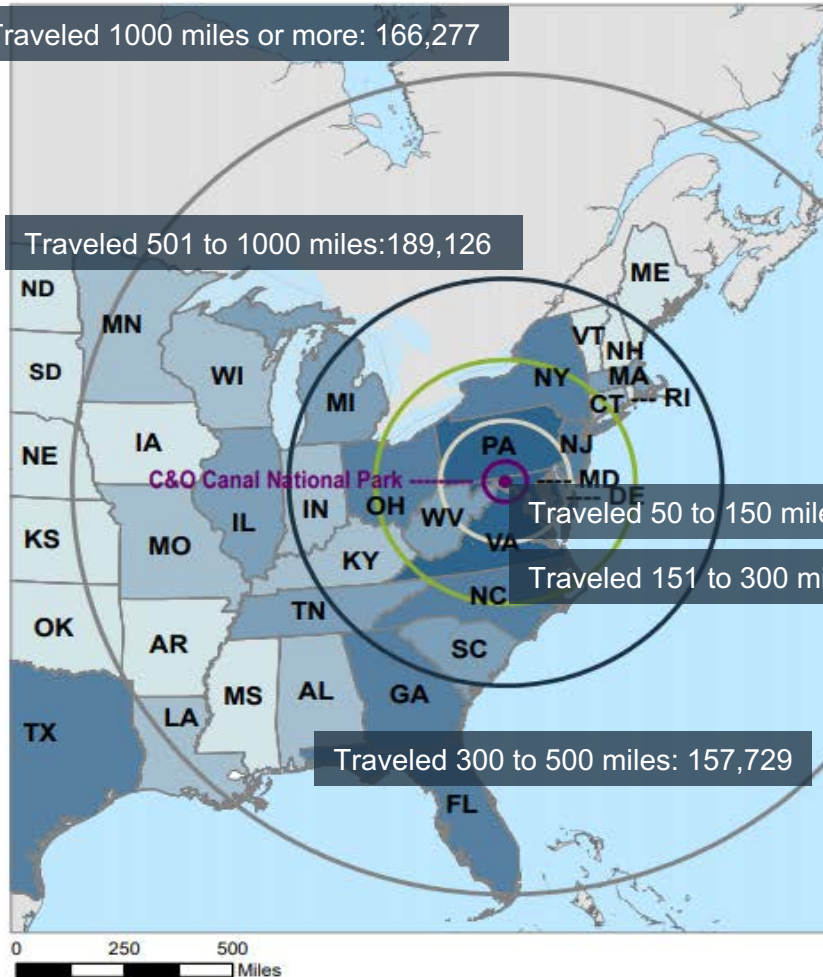
Traveled 1000 miles or more: 166,277

Traveled 501 to 1000 miles: 189,126

Traveled 50 to 150 miles: 534,316

Traveled 151 to 300 miles: 264,302

Traveled 300 to 500 miles: 157,729

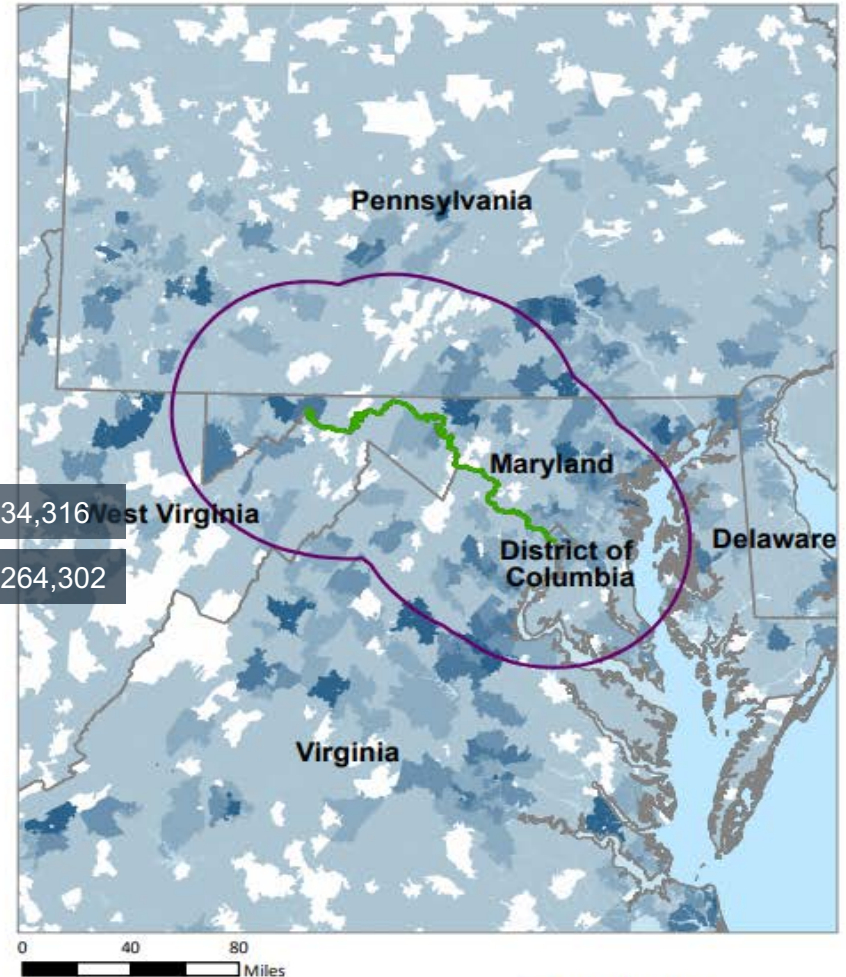


Mile Distance from the Approximate Center of the C&O Canal National Park

50 300 1000
150 500

Estimated Visits by ZIP Code

6,000 and Less 36,001 to 90,000
6,001 to 18,000 90,001 and Greater
18,001 to 36,000



Estimated Visits by Zip Code

None 60,001 to 90,000
30,000 and Less 90,001 to 120,000
30,001 to 60,000 120,001 and Greater

C&O Canal Park
50 Miles



Source: UberMedia, NPS, Rockport Analytics

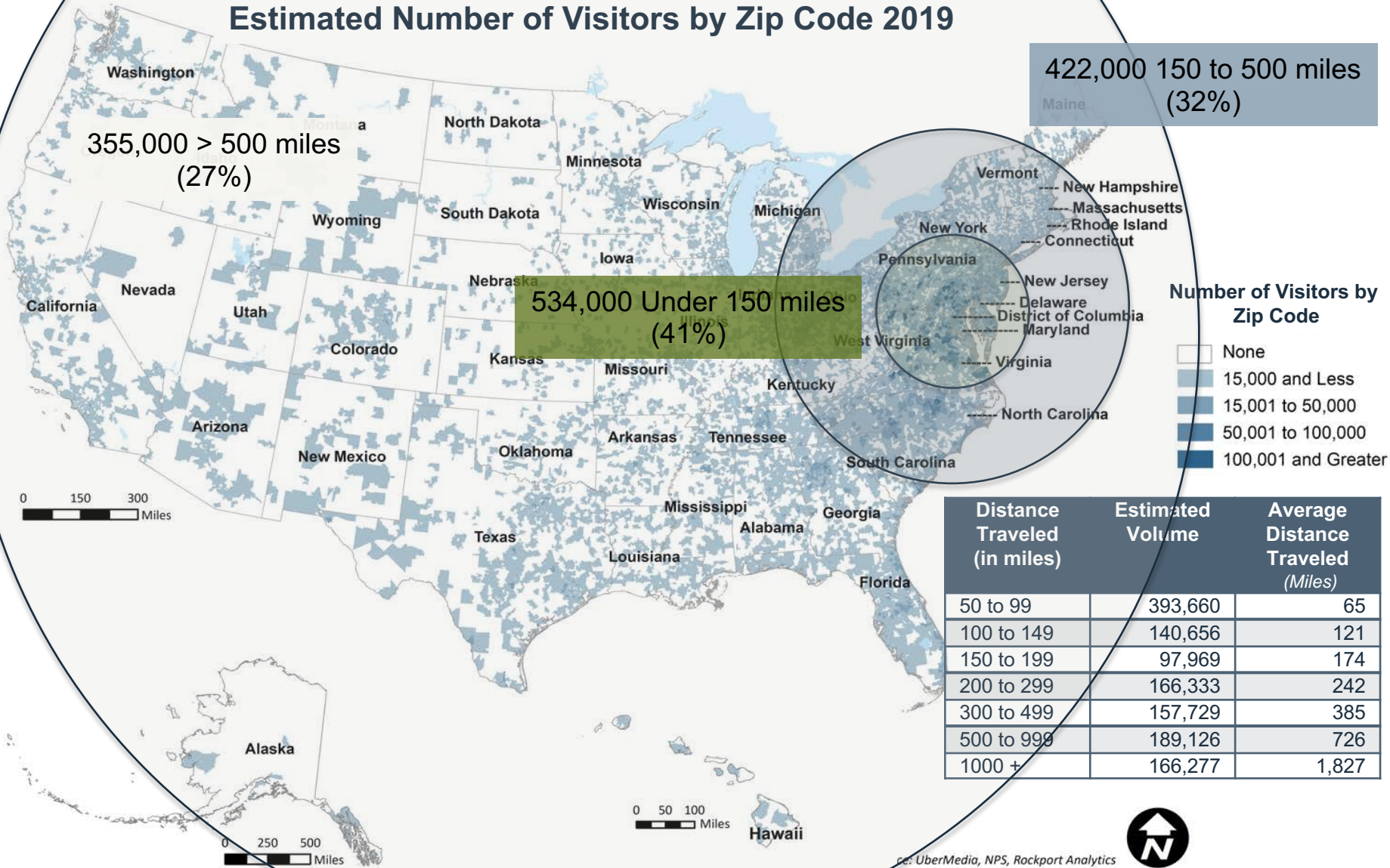
Top 25 States of Origin

State of Origin of Visitors Traveling 50+ Miles	Share of Visitation	Estimated Volume	Average Distance Traveled
Pennsylvania	13.8%	174,042	119
Virginia	12.3%	154,638	113
Maryland	9.1%	114,494	76
North Carolina	6.6%	83,581	282
New York	6.6%	83,372	244
Florida	6.0%	76,242	827
New Jersey	4.6%	57,741	181
Ohio	4.1%	51,263	290
Texas	3.6%	44,897	1252
Georgia	2.9%	37,030	537
California	2.8%	35,195	2308
West Virginia	2.8%	35,070	123
South Carolina	2.1%	27,119	420
Illinois	2.1%	26,202	594
Tennessee	1.9%	23,797	504
Massachusetts	1.9%	23,755	387
Michigan	1.7%	21,072	425
Delaware	1.3%	16,485	115
Indiana	1.1%	14,373	469
Connecticut	1.1%	14,220	286
Alabama	0.9%	11,801	665
Colorado	0.8%	10,300	1481
Kentucky	0.8%	9,813	423
Washington, D.C	0.8%	9,549	70
Missouri	0.7%	9,230	786

- Of the estimated 1.3 million visitors who traveled more than 50 miles to the C&O Canal NHP, about 6 in 10 visitors, or nearly 757,500, traveled from various states across the US that do not neighbor Maryland.
- Not surprisingly, a large share of visitors travel from regional markets but the park also has a relatively strong draw from markets in the Mid-Atlantic region given the area's robust highway system and the relatively short distances between major cities. An estimated 155,333 (21%) traveled from the Mid-Atlantic states of New Jersey, Connecticut and New York.
- With 224,000 visitors, the South Atlantic region has the largest visitor volume. States in this region include North Carolina, Georgia, South Carolina and Florida. When combined, the Mid-Atlantic and the South-Atlantic regions accounted for more than half of all non-neighboring-state visitors (379,304).
- The Mid-West states of Ohio, Illinois, Michigan, and Indiana accounted for nearly 113,000 visitors in 2019. In this region, Ohio is the closest state to Maryland and Buckeye visitors were almost as numerous as visitors from New Jersey even though they traveled about 100 miles more.

2019 C&O Canal NHP Visitor Origin by Zip Code

Estimated Number of Visitors by Zip Code 2019



ce: UberMedia, NPS, Rockport Analytics

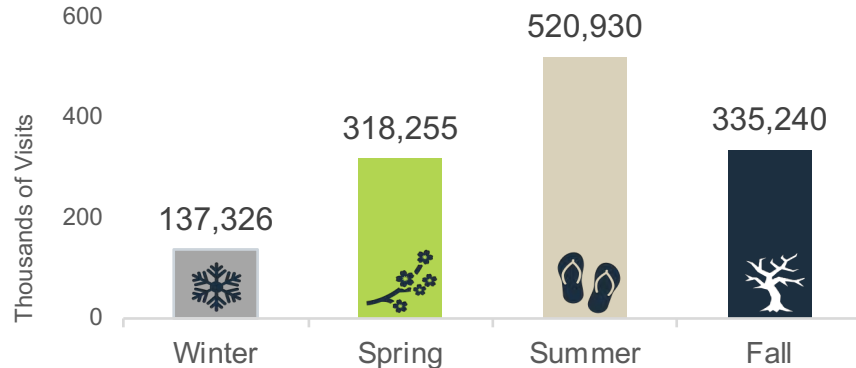
Top 25 Metro Areas of Origin

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.

Seasonality of C&O Canal National Park Visitation

C&O Canal NHP Visitors by Season 2019



Source: UberMedia, Rockport Analytics

- Index numbers are a way of expressing the difference between two measurements. The tables to the right show us which visitor segments are above or below the average for each season.
- Regional visitors that travel less than 100 miles are visiting in the summer and fall seasons. The winter season sees more visitors that travel more than 100 miles. The spring season sees more visitors that travel for even longer distances (more than 300 miles).
- The presence of visitors from further away during the winter and spring months is likely driven by travel for the holidays to spend time with friends and family.
- The higher propensity for longer haul, overnight visitors to visit in the winter and spring helps to support the regional tourism industry during the region's slower seasons.

Seasonal Index Scores By Distance Traveled & Section of Park Visited

Average = 100

Distance
Traveled
(Miles)



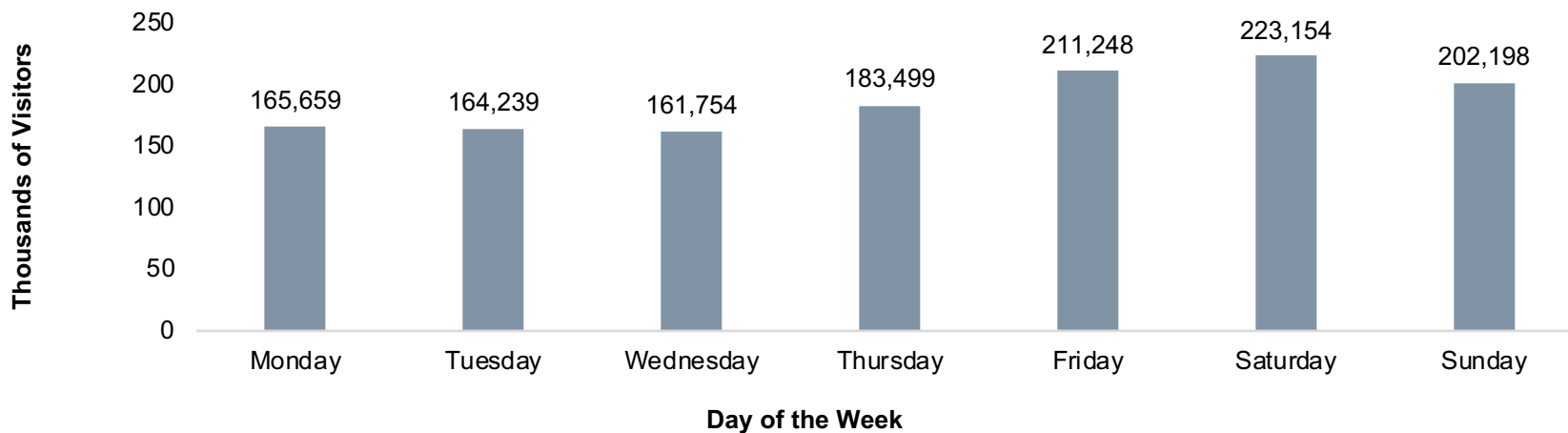
Distance Traveled (Miles)	Winter	Spring	Summer	Fall
50-99	89.4	98.1	104.8	111.0
100-199	105.6	98.1	97.9	98.0
200-299	109.2	98.1	96.3	95.4
300-500	105.2	108.6	95.0	86.9
500+	108.6	101.8	97.0	89.7

Park Section Visited

Park Section Visited	Winter	Spring	Summer	Fall
Washington	92.5	93.3	111.4	103.1
Montgomery	99.5	101.9	96.6	103.1
Allegany	88.9	93.2	109.4	111.4
Frederick	80.5	95.8	116.9	107.1

Roughly 50% of Park Visits on Friday, Saturday & Sunday

C&O Canal NHP 2019 Visitor Volume by Day of the Week

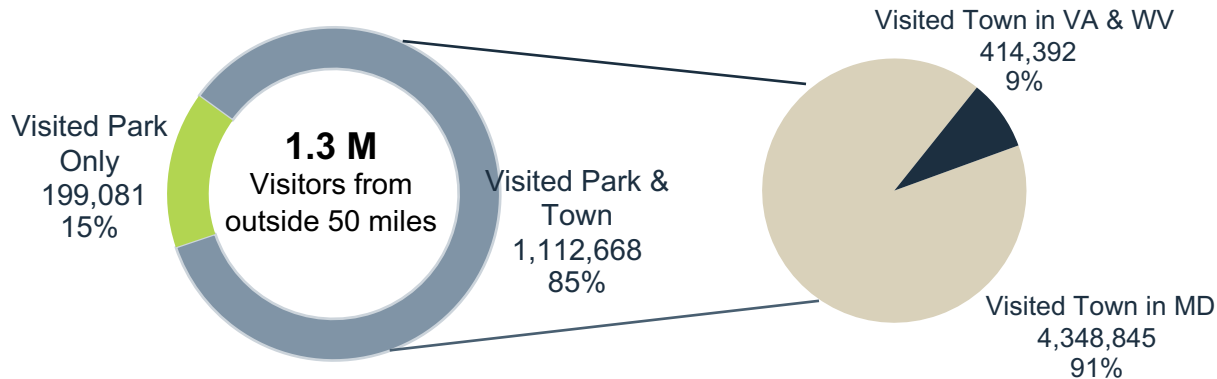


Source: UberMedia, Rockport Analytics

2019 Visitation by Day of the Week to Sections of the C&O Canal NHP in Maryland

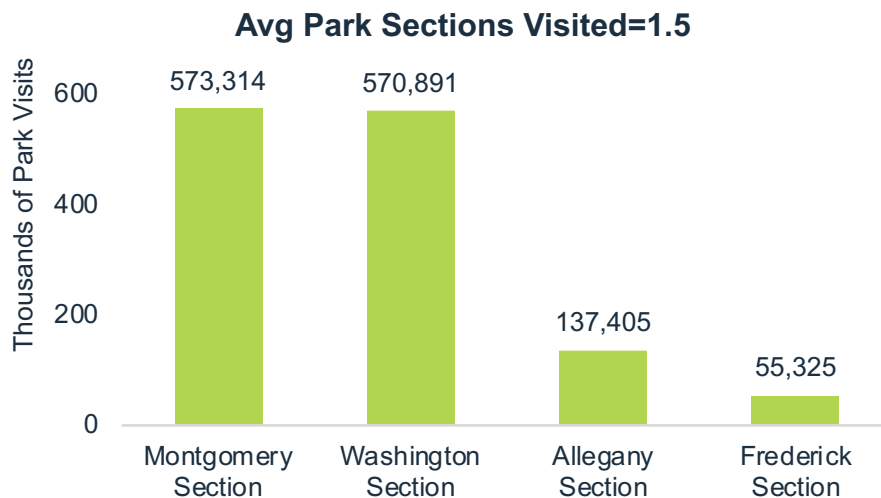
Day of the Week	Washington Park Section	Montgomery Park Section	Allegany Park Section	Frederick Park Section
Monday	13.0%	12.8%	13.0%	13.0%
Tuesday	12.6%	13.3%	11.8%	12.0%
Wednesday	12.6%	13.0%	12.1%	11.7%
Thursday	14.3%	14.3%	13.4%	13.7%
Friday	16.3%	15.6%	16.8%	17.0%
Saturday	16.3%	16.3%	16.9%	16.8%
Sunday	14.9%	14.8%	15.9%	15.8%

85% of C&O Canal NHP Visitors Also Visited a Town in the Region

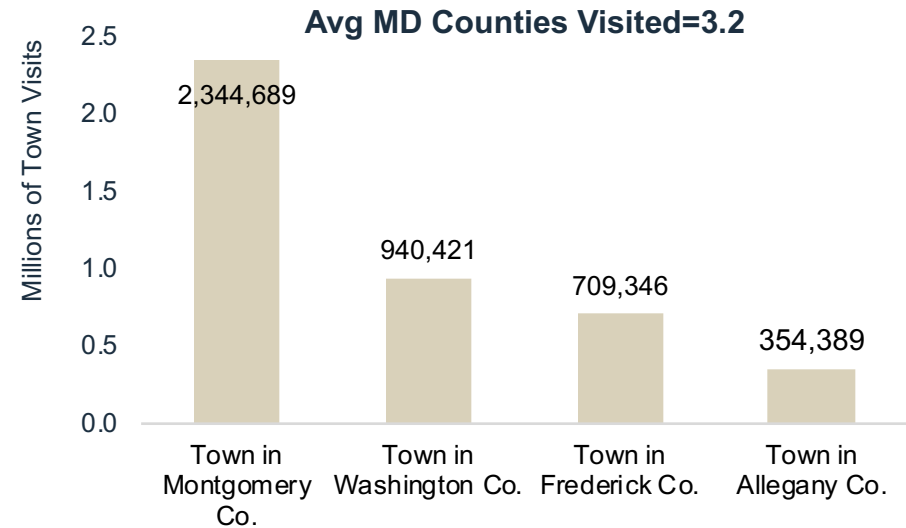


- In 2019, 85% of park visitors to the park also visited towns or cities in the region. On average, park visitors also visited 3.6 towns/cities.
- These 1.3 million park visitors resulted in almost 4.8 million visits to towns/cities in the region and 4.3 million of these visits were to towns/cities in Maryland

Number of Visits to Each Section of the C&O Canal NHP (2019)

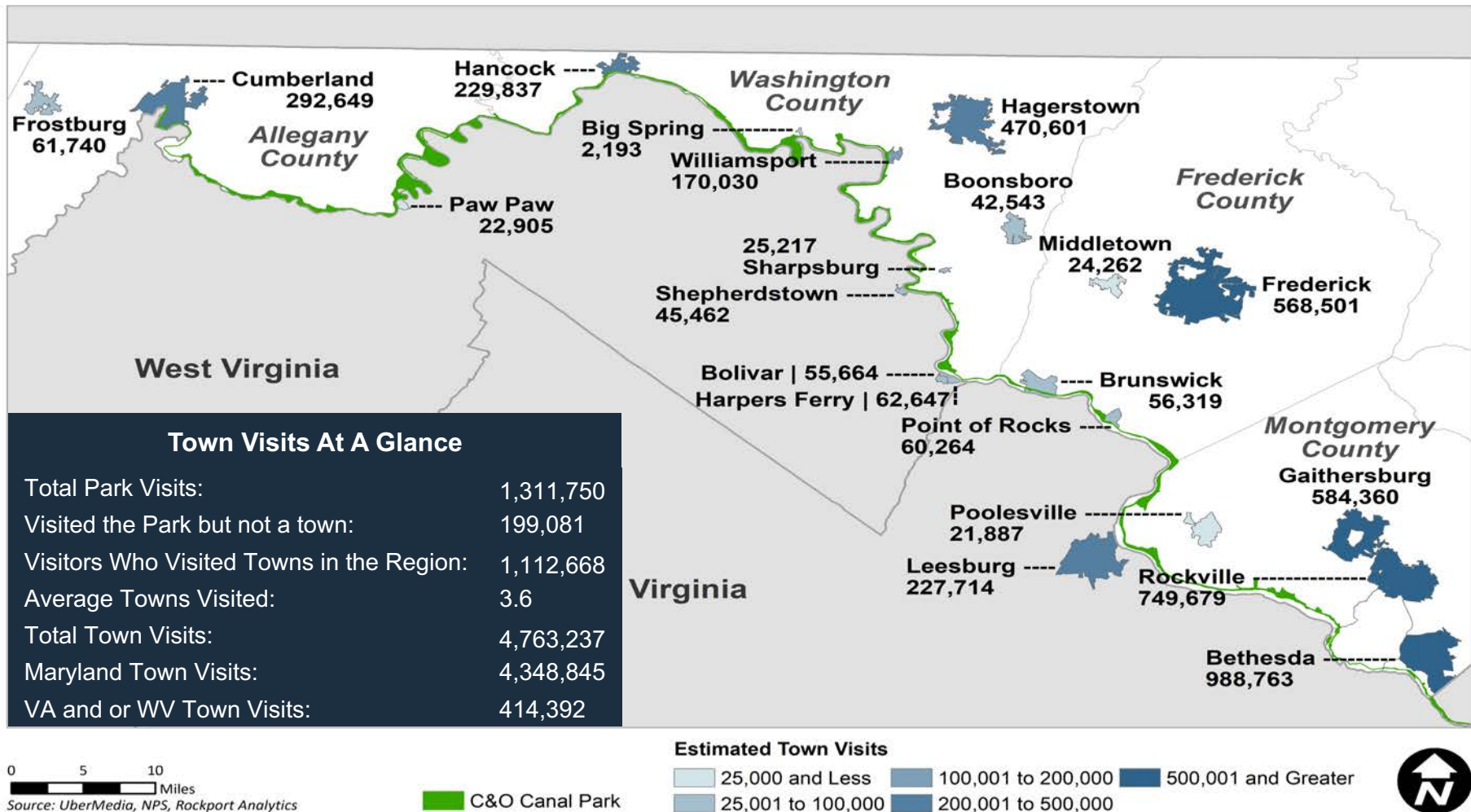


Number of Visits to Towns in Maryland Counties By Park Visitors (2019)



Source: UberMedia, Rockport Analytics

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.

The Allegany County Section of the C&O Canal NHP Received 10.5% of Visits

Estimated
Visitors

137.4 K

Avg Miles
Traveled

185

Avg Towns
Visited

4.1

Length Of
Park Section
(Miles)

~50

Top 5 Metro Areas of Origin

Washington, DC (Hagerstown, MD)	21.7%
Pittsburgh, PA	14.4%
Baltimore, MD	6.9%
Norfolk-Portsmouth-Newport News, VA	4.1%
Richmond-Petersburg, VA	3.7%

0 5 10
Miles

Source: UberMedia, NPS, Rockport Analytics

Cumberland

130,847

Frostburg

23,607

**Allegany
County**

Hancock

27,420

----- Paw Paw | 15,744

West Virginia

Virginia

County Visited by Allegany Park Section Visitors in 2019

Town in VA/WV	42,618
Washington Co.	49,456
Montgomery Co.	61,554
Frederick Co.	37,931
Allegany Co.	154,454






**Towns
Visited**

**Town
Visits**

Cumberland	130,847
Frederick	29,874
Hancock	27,420
Frostburg	23,607
Bethesda	21,234
Rockville	21,152
Leesburg	20,158
Gaithersburg	18,472
Paw Paw	15,744
Hagerstown	14,714

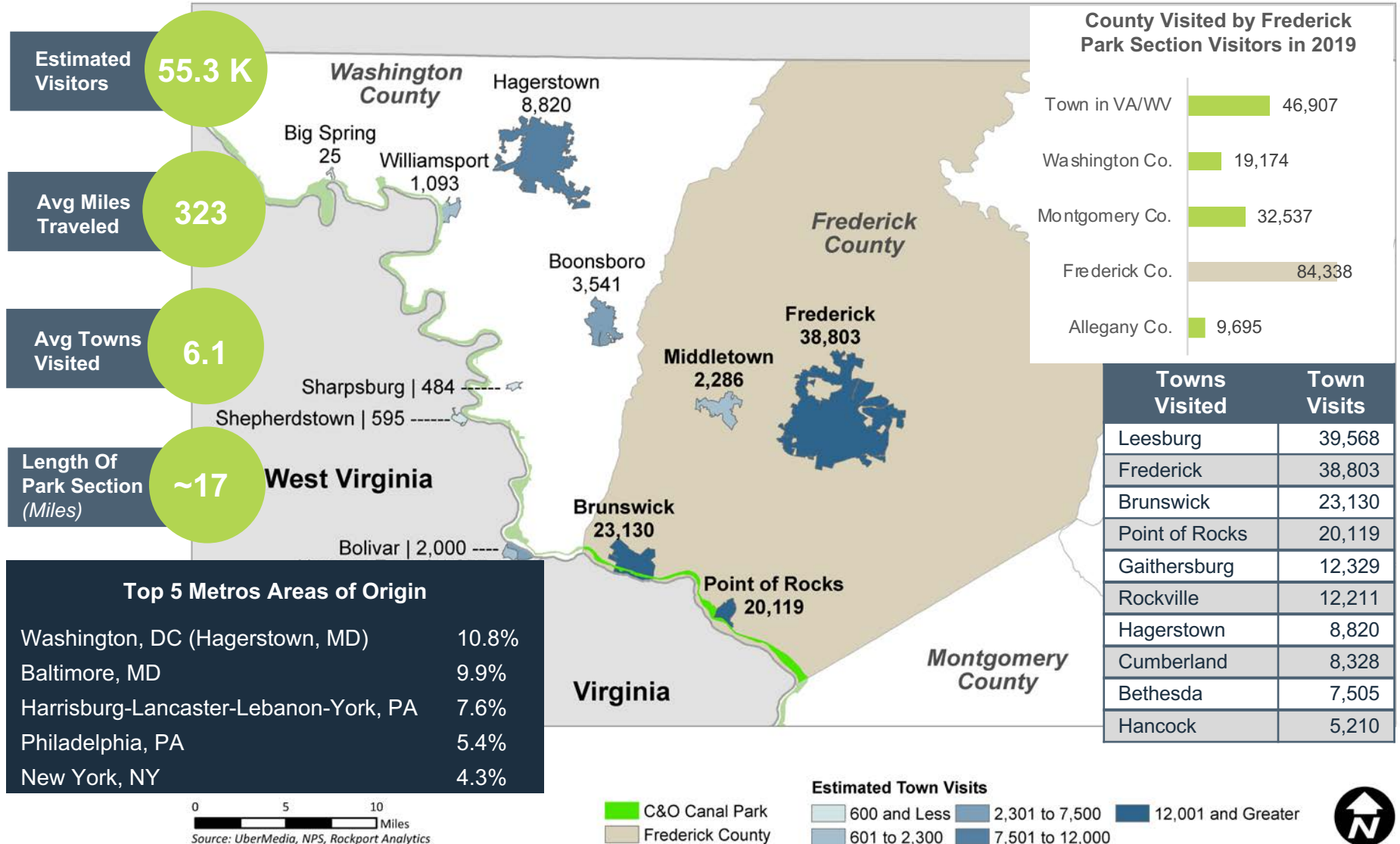
Estimated Town Visits

 C&O Canal Park
 Allegany County

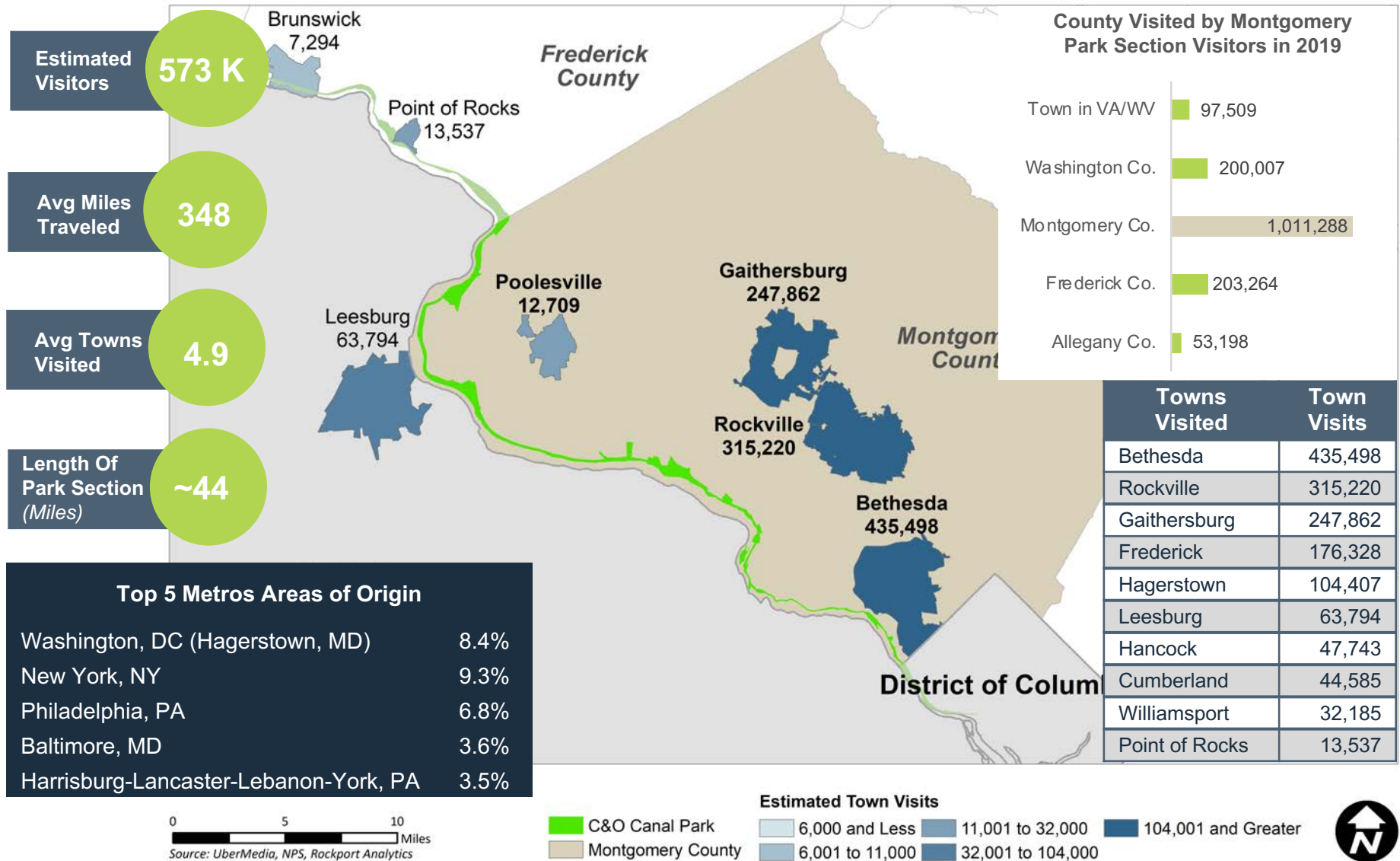
 1,300 and Less  1,301 to 3,300  3,301 to 16,000  16,001 to 21,000  21,001 and Greater



The Frederick County Section of the C&O Canal NHP Received 4.2% of Visits



The Montgomery County Section of the C&O Canal NHP Received 43.7% of Visits



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

Estimated
Visitors

571 K

Avg Miles
Traveled

218

Avg Towns
Visited

4.2



Length Of
Park Section
(Miles)

~80






Top 5 Metros Areas of Origin

Washington, DC (Hagerstown, MD)	13.7%
Baltimore, MD	8.3%
Philadelphia, PA	5.5%
New York, NY	5.5%
Pittsburgh, PA	4.6%

0 5 10
Miles
Source: UberMedia, NPS, Rockport Analytics

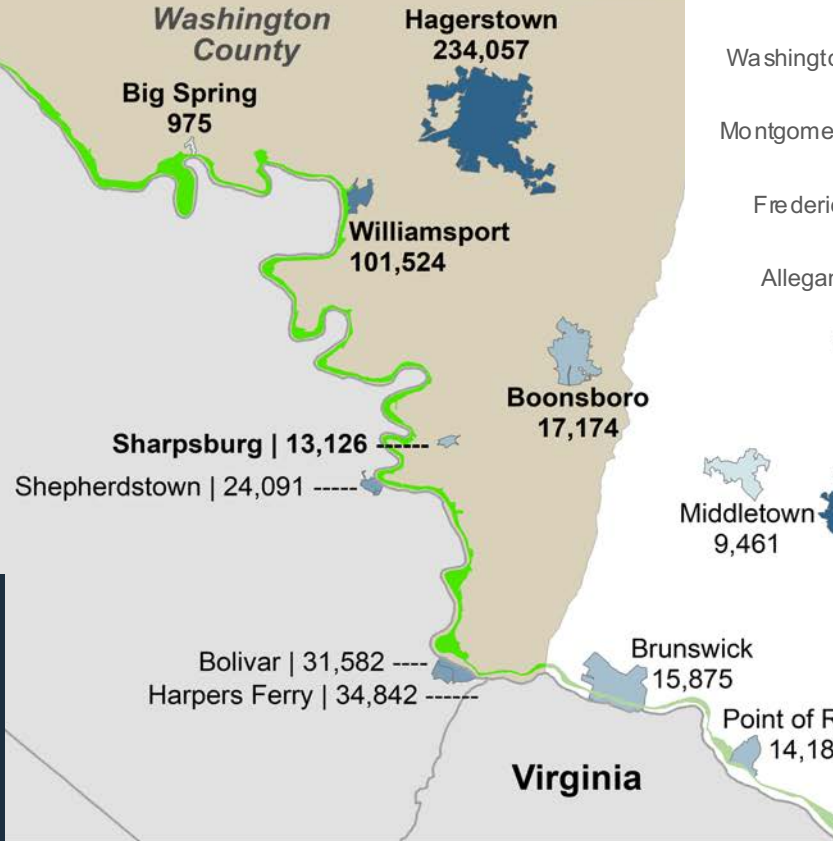
 C&O Canal Park
 Washington County

Estimated Town Visits

 13,000 and Less  24,001 to 55,000  122,001 and Greater
 13,001 to 24,000  55,001 to 122,000

County Visited by Washington Park Section Visitors in 2019

Town in VA/WV	149,429
Washington Co.	489,038
Montgomery Co.	430,741
Frederick Co.	231,700
Allegany Co.	104,937

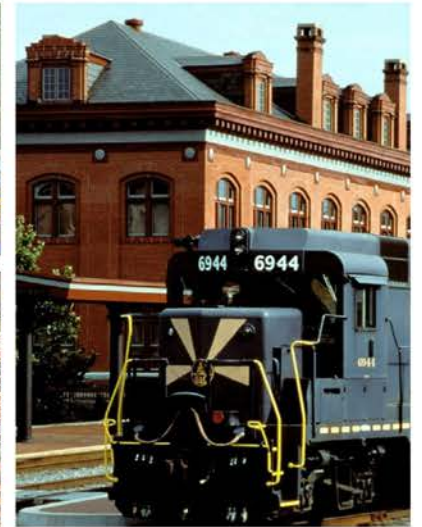


Towns Visited	Town Visits
Hagerstown	234,057
Frederick	192,181
Bethesda	162,064
Rockville	150,131
Hancock	122,182
Gaithersburg	115,903
Williamsport	101,524
Cumberland	81,398
Leesburg	55,328
Harpers Ferry	34,842



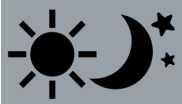
2019-2020 Visitation Analysis, Visitor Profile & Economic Impact Assessment

C&O Canal Park Visitor Profile (Online & Intercept Visitor Survey Responses)



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%



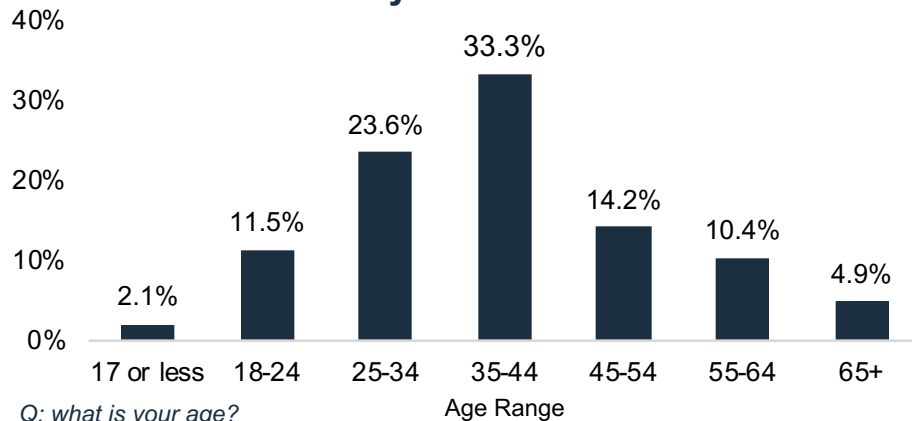
Avg HH
Income
\$96K



Avg Age
40

C&O Canal NHP Visitor Profile: Demographics

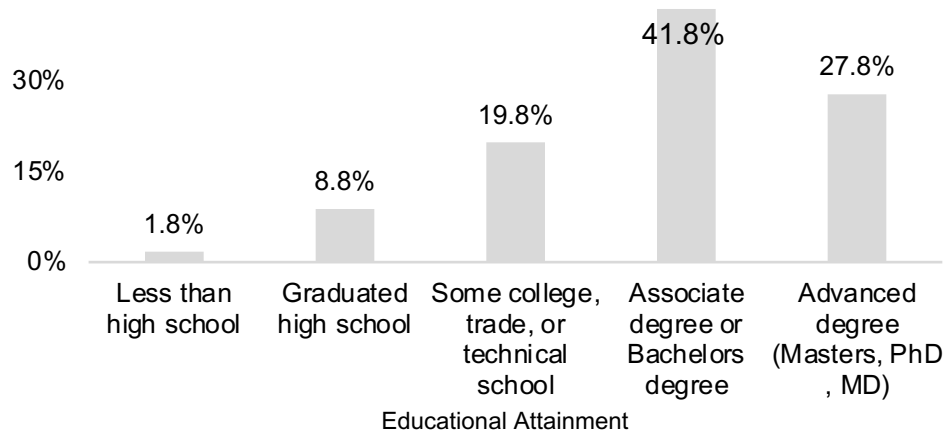
Age of visitors is well distributed with with an average age of **40**
57% are 25 - 44 years old
Only 5% above 65



Q: what is your age?

N: 288, excludes "prefer not to answer responses"

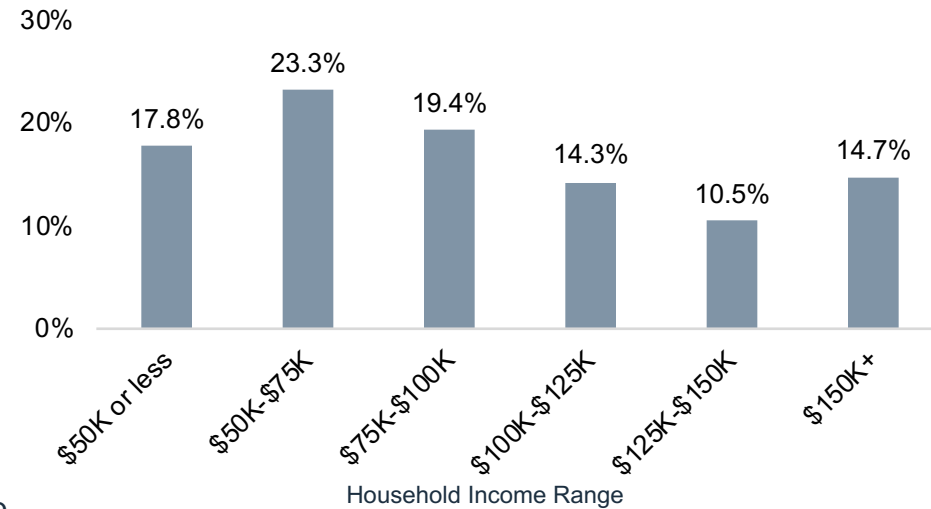
69% of visitors have obtained at least an Associates degree



Q: What is your highest level of educational attainment?

N: 273, excludes "prefer not to answer responses"

60% of visitors have a HHI of less than \$100K
25% have a HHI greater than \$125K
The average among all visitors is \$96K



Q:What is your household income?

N: 258, excludes "prefer not to answer responses"

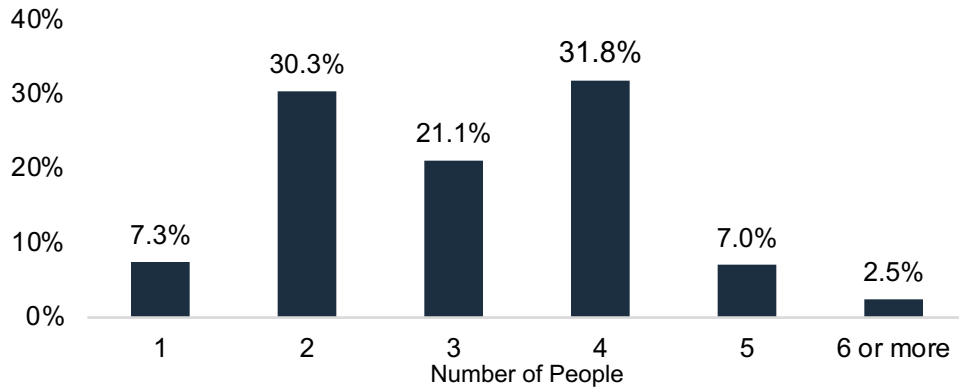
Ethnicity/Race of Park Visitors

White/Caucasian	83.0%
Black or African American	6.8%
Hispanic or Latino	5.3%
Asian or Asian American	2.3%
Native American/American Indian/Alaskan Native	0.4%
Other	2.3%

Q:With which race/ethnicity to you most closely identify with?

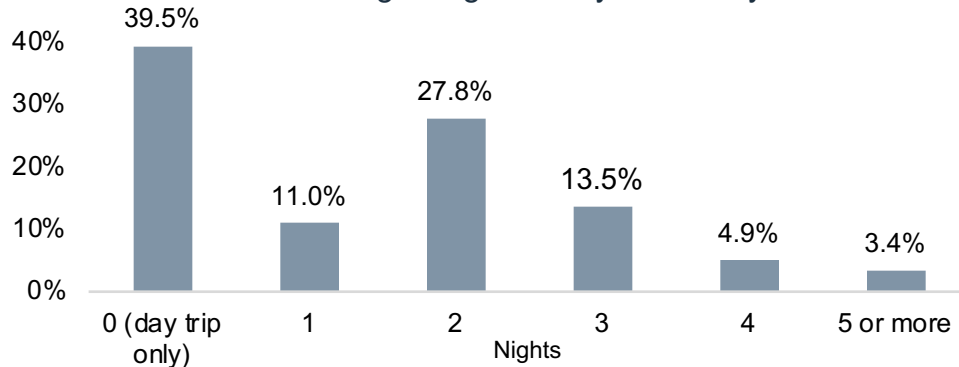
N: 265, excludes "prefer not to answer responses"

59% of visitors travel in parties of 3 or less and
53% in larger parties of 3-4
3.1 is the average party size



Q: Including yourself, how many people were in your immediate travel party?
 N: 327

60% of visitors spend the night with 40% staying 1-2 nights.
 The average length of stay is **2.5** days



Q: how many total nights did you stay in the area?
 N: 327



For **70%** of visitors, the C&O was
 Primary reason for being in the area

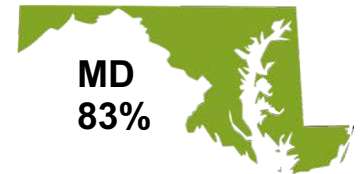


20% of survey respondents, say their
 primary residence is in Maryland

83% of visitors spent money in Maryland restaurants,
 hotels, attractions, and retail establishments



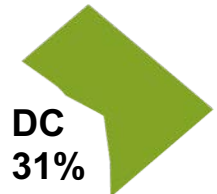
WV
15%



MD
83%



VA
34%

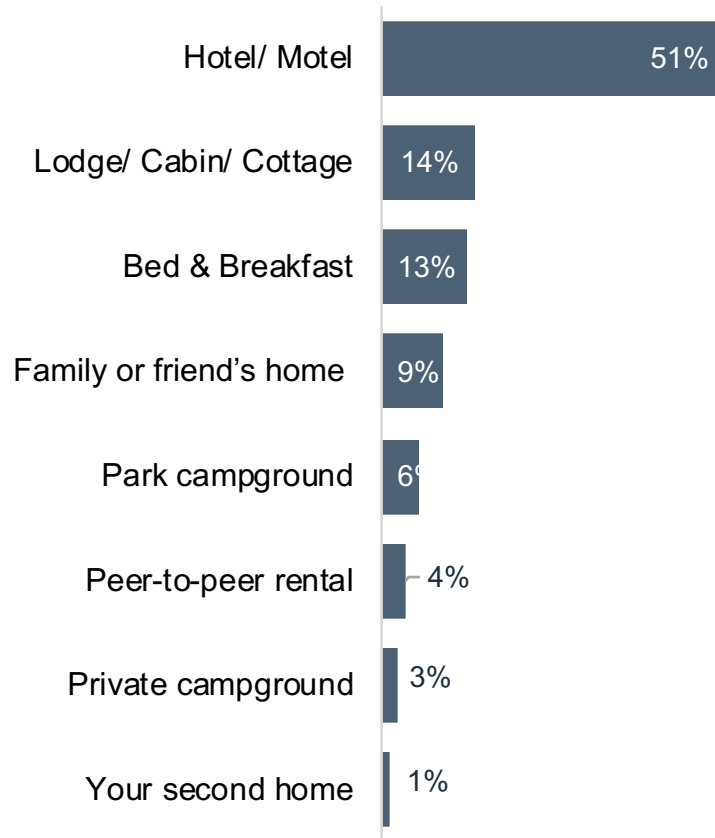


DC
31%

Q: In which of the following state(s) did you visit restaurants, hotels or
 attractions or make any retail purchases? (select all that apply)
 N: 254

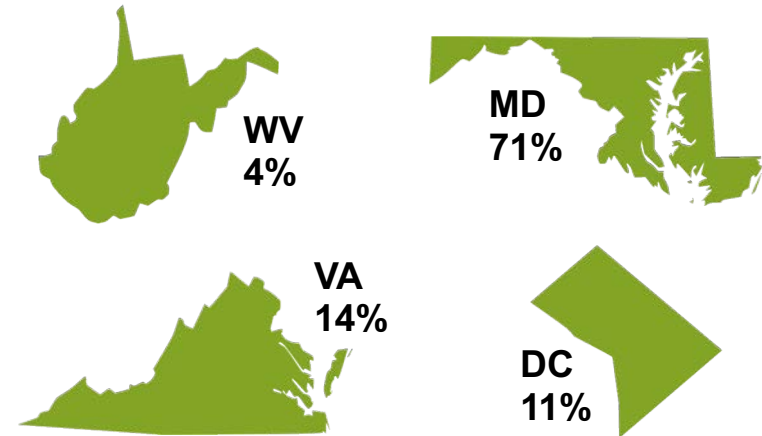
Lodging & Accommodations Choice Among Park Visitors

90% stayed in paid accommodations
49% stayed somewhere other than a hotel/motel

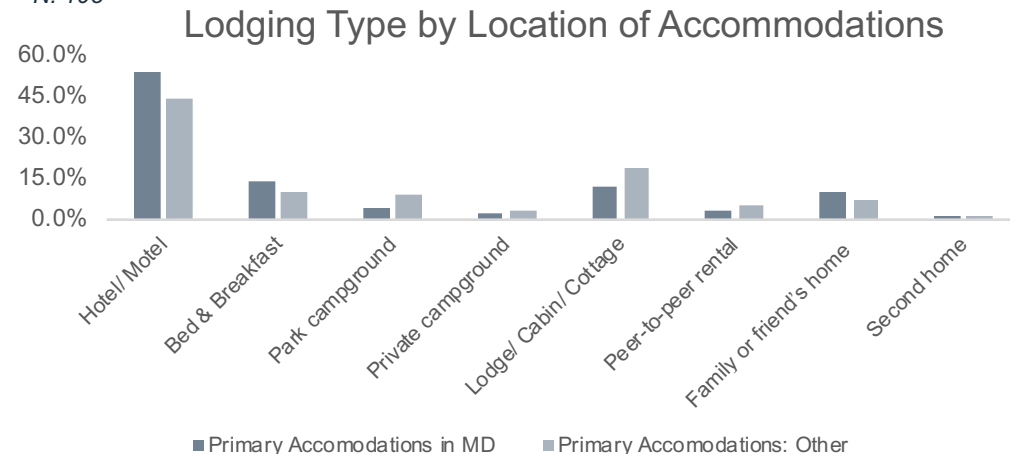


Q: Which of the following best describes your primary accommodations?
N: 327

For most visitors, the location of their primary accommodations was Maryland



Q: During your most recent stay, in which state were your primary overnight accommodations located?
N: 195

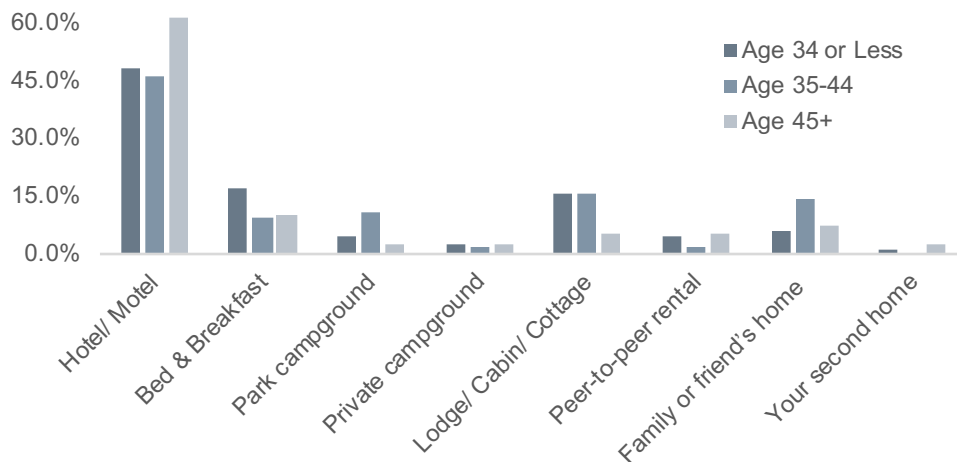


Lodging Choice By Demographic Segment

Lodging Type by Household Income Cohort



Lodging Type by Age Cohort

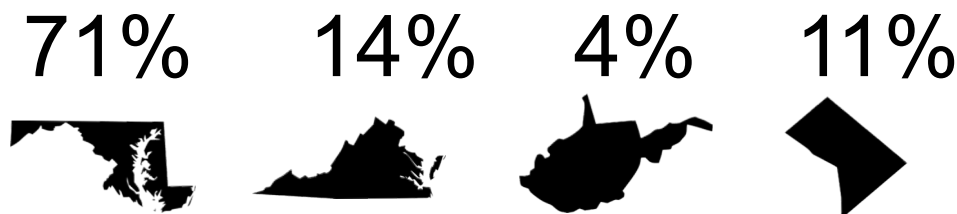


C&O Visitor Accommodation & Lodging Insights:

- 90% of overnight park visitors stayed in a traditional hotel.
- The primary accommodations for 71% of overnight visitors were located in Maryland.
- Younger visitors and visitors with household incomes greater than \$75k are significantly more likely to stay in a B&B than those with lower household incomes.
- Older visitors are more likely to stay in a traditional hotel or motel than younger visitors.
- Park visitors with lodging accommodations in Maryland are more likely to stay in a traditional hotel or a B&B than those staying in outside MD. Conversely, visitors staying in Maryland lodging are less likely to stay at a campground or cottage.

Location of Accommodations

Accommodations for **71% of Overnight Visitors** to the Park
were located in **Maryland**

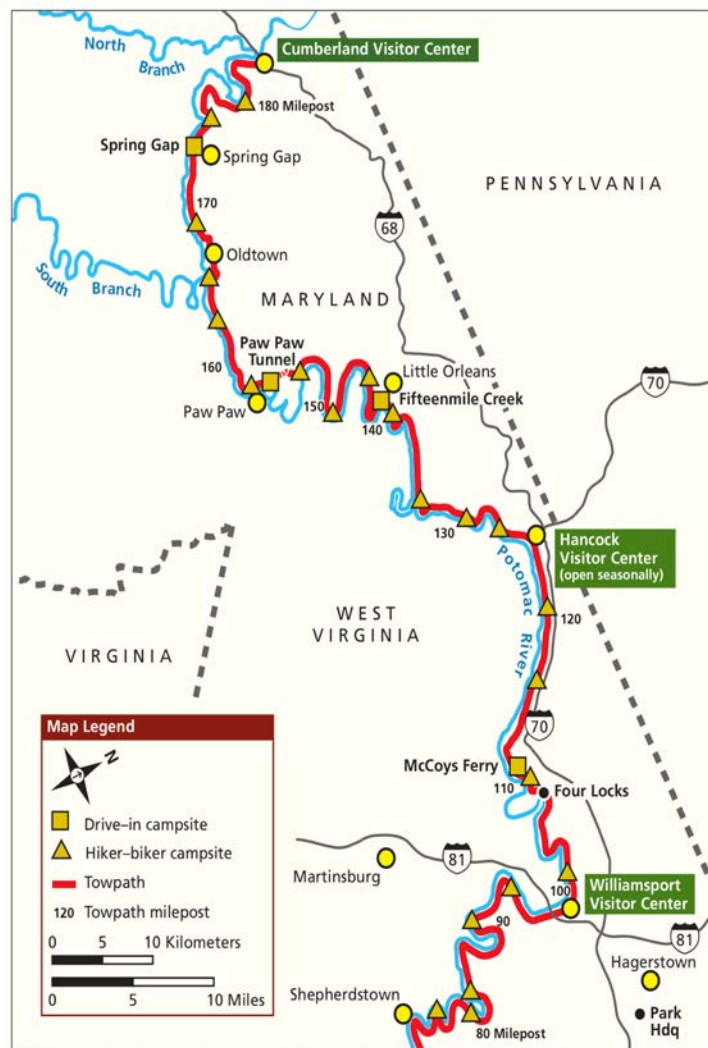


Overnight	70.8%	13.9%	4.1%	11.3%
First Time	71.0%	15.9%	3.6%	9.4%
Repeat Visitor	70.2%	8.8%	5.3%	15.8%
HH Income \$75K or less	74.6%	9.5%	3.2%	12.7%
HH Income \$75K-\$125K	76.0%	16.0%	4.0%	4.0%
HH Income \$125K+	60.0%	12.5%	5.0%	22.5%
Age 34 or Less	62.9%	15.7%	4.3%	17.1%
Age 35-44	74.6%	12.7%	3.2%	9.5%
Age 45+	82.1%	7.7%	2.6%	7.7%

Q: During your most recent stay, in which state were your primary overnight accommodations located? (N: 195)

- The heat map table above showcases the visitors segments more or less likely to stay in various regions during their trip to the C&O Canal NHP . MD attracts the most overnight visitors with the primary accommodations of 71% of park visitors located within the state.
- Maryland is even more likely to attract visitors over 45 and those with household incomes between \$75k and \$125k.
- While only 11% of park visitors stay in Washington DC, the district attracts 17% of younger visitors (those under 35) and 22.5% of visitors with household incomes great than \$125k.

C&O Canal NHP Visitor Profile: Towns Visited



*Based on survey responses

Towns Visited*	Towns Visited During Most Recent Trip	Towns Planning to Visit on a Future Trip	Location of Primary Accommodations
Maryland			
Big Spring	7.1%	13.5%	2.9%
Boonsboro	3.2%	9.6%	2.2%
Brunswick	7.4%	11.9%	1.5%
Cumberland	13.1%	25.3%	9.4%
Frederick	25.3%	29.2%	8.0%
Frostburg	6.1%	14.1%	0.7%
Gaithersburg	13.1%	22.1%	4.4%
Hagerstown	21.5%	25.6%	11.6%
Hancock	8.3%	12.8%	5.8%
Little Orleans	5.5%	13.8%	0.7%
Middletown	7.4%	9.6%	5.1%
Point of Rocks	11.2%	21.8%	4.4%
Poolesville	2.2%	11.2%	0.7%
Potomac	19.2%	27.2%	10.1%
Rockville	18.3%	19.2%	10.9%
Sharpsburg	7.7%	14.1%	2.2%
Williamsport	12.8%	16.7%	12.3%
West Virginia			
Berkeley Springs	8.0%	19.6%	25.0%
Bolivar	2.2%	8.3%	12.5%
Harpers Ferry	14.1%	41.7%	37.5%
Pawpaw	4.8%	13.1%	0.0%
Shepherdstown	6.4%	17.3%	12.5%
Virginia			
Leesburg	20.5%	26.6%	85.2%

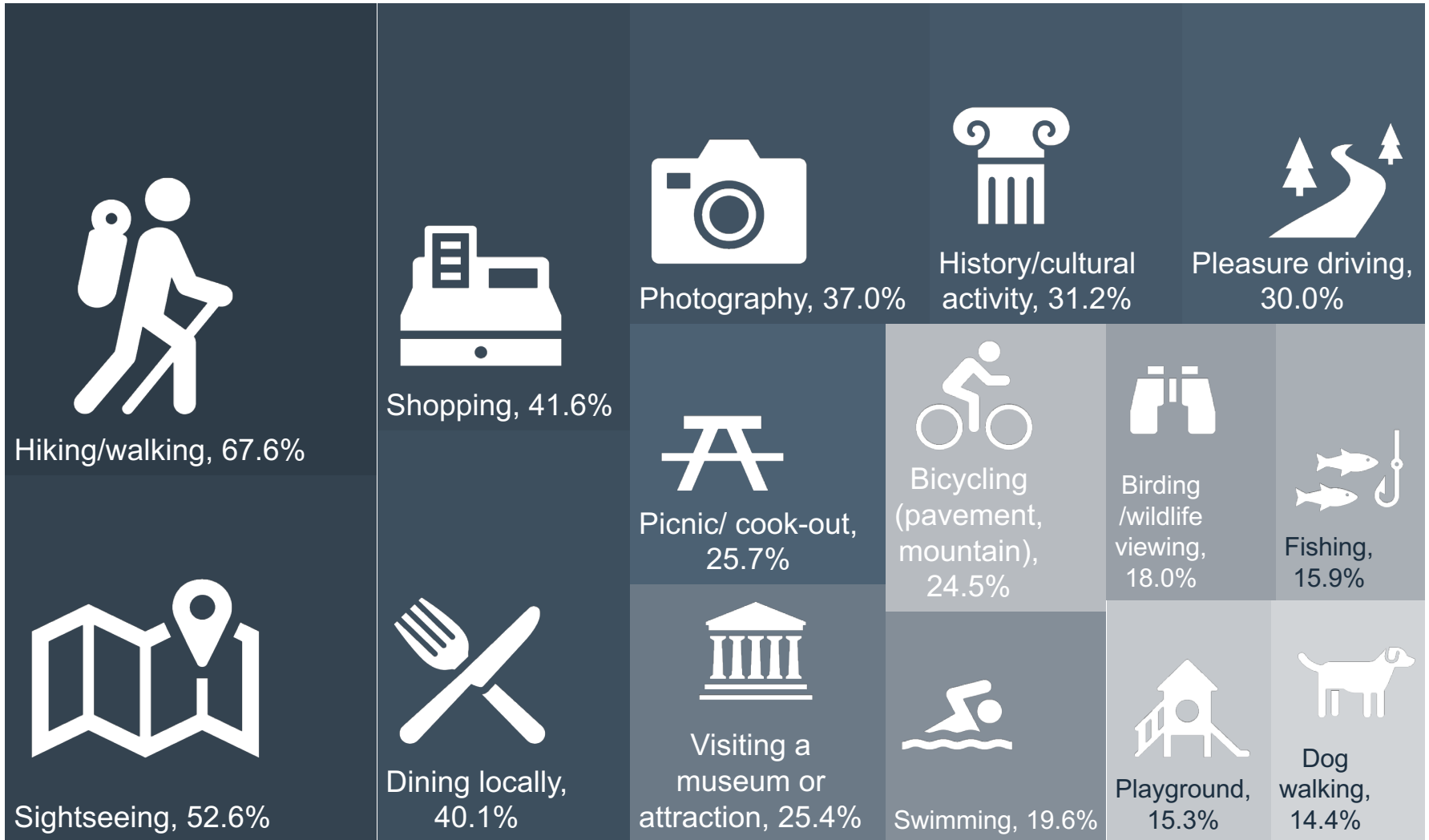
C&O Canal NHP Towns Visited By Various Visitor Segments

Towns Visited	Day	Overnight
Big Spring	0%	11%
Boonsboro	3%	4%
Brunswick	5%	9%
Cumberland	7%	17%
Frederick	27%	24%
Frostburg	4%	7%
Gaithersburg	8%	17%
Hagerstown	17%	24%
Hancock	3%	11%
Little Orleans	0%	9%
Middletown	1%	11%
Point of Rocks	7%	14%
Poolesville	2%	3%
Potomac	11%	24%
Rockville	13%	21%
Sharpsburg	7%	8%
Williamsport	7%	17%
West Virginia		
Berkeley Springs	3%	11%
Bolivar	2%	3%
Harpers Ferry	12%	16%
Pawpaw	0%	8%
Shepherdstown	6%	7%
Virginia		
Leesburg	12%	26%

Towns Visited	First Time	Repeat
Big Spring	7%	8%
Boonsboro	2%	5%
Brunswick	4%	14%
Cumberland	13%	13%
Frederick	28%	20%
Frostburg	7%	5%
Gaithersburg	13%	13%
Hagerstown	21%	22%
Hancock	8%	10%
Little Orleans	6%	5%
Middletown	6%	11%
Point of Rocks	10%	14%
Poolesville	1%	4%
Potomac	19%	19%
Rockville	20%	15%
Sharpsburg	6%	11%
Williamsport	12%	15%
West Virginia		
Berkeley Springs	9%	7%
Bolivar	2%	4%
Harpers Ferry	12%	18%
Pawpaw	6%	3%
Shepherdstown	5%	10%
Virginia		
Leesburg	22%	18%

Towns Visited	Lodging Location in MD	Lodging Location in Other State
Big Spring	12%	11%
Boonsboro	3%	5%
Brunswick	7%	12%
Cumberland	17%	18%
Frostburg	7%	9%
Frederick	26%	21%
Gaithersburg	17%	16%
Hagerstown	26%	19%
Hancock	11%	12%
Little Orleans	10%	7%
Middletown	13%	9%
Point of Rocks	15%	12%
Poolesville	3%	2%
Potomac	26%	19%
Rockville	22%	19%
Sharpsburg	10%	5%
Williamsport	17%	16%
West Virginia		
Berkeley Springs	9%	16%
Bolivar	2%	4%
Harpers Ferry	13%	23%
Pawpaw	5%	14%
Shepherdstown	6%	9%
Virginia		
Leesburg	18%	44%

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

Heat Map Table Comparing Activity Participation
Among **Day and Overnight** Visitors

Activities Participated In During Visit	Day Trip	Overnight
Hiking/ walking	79.8%	59.6%
Sightseeing	45.7%	57.1%
Shopping	22.5%	54.0%
Dining locally	28.7%	47.5%
Photography	34.1%	38.9%
History/ cultural interest	25.6%	34.9%
Pleasure driving	27.1%	31.8%
Picnic/ cook-out	17.8%	30.8%
Visit to a museum or attraction	12.4%	33.8%
Swimming	3.1%	30.3%
Birding/ wildlife viewing	17.1%	18.7%
Fishing	5.4%	22.7%
Bicycling on pavement	12.4%	17.7%
Playground	7.8%	20.2%
Dog walking	12.4%	15.7%
Visit to winery, brewery, distillery	7.0%	18.7%
Canoeing/ kayaking/ rafting	7.0%	16.2%
Climbing	3.9%	14.7%
Mountain biking	3.1%	12.6%
Interpretive programs/ exhibits	3.1%	8.1%
Hunting	0.0%	8.6%
Water-skiing	0.0%	7.1%

Heat Map Table Comparing Activity Participation
Among **First Time and Repeat** Visitors

Activities Participated In During Visit	First Time	Repeat
Hiking/ walking	67.3%	68.0%
Sightseeing	57.4%	44.8%
Shopping	47.0%	32.8%
Dining locally	46.0%	30.4%
Photography	37.1%	36.8%
History/ cultural interest	34.2%	26.4%
Pleasure driving	32.2%	26.4%
Picnic/ cook-out	26.2%	24.8%
Visit to a museum or attraction	31.2%	16.0%
Swimming	18.8%	20.8%
Birding/ wildlife viewing	15.4%	22.4%
Fishing	14.4%	18.4%
Bicycling on pavement	11.4%	22.4%
Playground	14.9%	16.0%
Dog walking	12.9%	16.8%
Visit to winery, brewery, distillery	15.8%	11.2%
Canoeing/ kayaking/ rafting	12.4%	12.8%
Climbing	10.4%	10.4%
Mountain biking	6.9%	12.0%
Interpretive programs/ exhibits	5.9%	6.4%
Hunting	4.5%	6.4%
Water-skiing	3.0%	6.4%

Q: Please select the activities that members of your party participated in, either in or outside the C&O Canal NHP National Park, during your most recent visit? *(select all that apply)*

Heat Map Table Comparing Activity Participation
Among Various **Age Cohorts**

Activities Participated In During Visit	34 or younger	35 to 44	45 or older
Hiking/ walking	67.3%	61.5%	74.1%
Sightseeing	53.3%	43.8%	54.1%
Shopping	47.7%	40.6%	36.5%
Dining locally	48.6%	33.3%	40.0%
Photography	41.1%	35.4%	36.5%
History/ cultural interest	31.8%	24.0%	37.7%
Pleasure driving	31.8%	21.9%	32.9%
Visit to a museum or attraction	28.0%	25.0%	20.0%
Picnic/ cook-out	28.0%	22.9%	21.2%
Swimming	22.4%	24.0%	12.9%
Birding/ wildlife viewing	17.8%	14.6%	16.5%
Fishing	17.8%	16.7%	12.9%
Bicycling on pavement	17.8%	17.7%	10.6%
Playground	13.1%	21.9%	5.9%
Visit to Winery, brewery, distillery	13.1%	19.8%	8.2%
Dog walking	20.6%	4.2%	10.6%
Canoeing/ kayaking/ rafting	21.5%	6.3%	4.7%
Climbing	13.1%	6.3%	5.9%
Mountain biking	10.3%	8.3%	3.5%
Interpretive programs/ exhibits	6.5%	4.2%	5.9%
Hunting	3.7%	8.3%	3.5%
Water-skiing	5.6%	4.2%	1.2%

Heat Map Table Comparing Activity Participation
Among Various **Income Cohorts**

Activities Participated In During Visit	HHI Under \$75K	HHI \$75K-\$125K	HHI \$125k+
Hiking/ walking	74.5%	63.2%	61.5%
Sightseeing	63.2%	47.1%	36.9%
Shopping	50.0%	33.3%	40.0%
Dining locally	50.0%	37.9%	29.2%
Photography	34.0%	37.9%	49.2%
History/ cultural interest	35.9%	28.7%	29.2%
Pleasure driving	34.9%	32.2%	20.0%
Visit to a museum or attraction	30.2%	20.7%	23.1%
Picnic/ cook-out	30.2%	17.2%	26.2%
Swimming	12.3%	19.5%	36.9%
Birding/ wildlife viewing	20.8%	14.9%	12.3%
Bicycling on pavement	11.3%	18.4%	20.0%
Fishing	13.2%	11.5%	26.2%
Playground	12.3%	11.5%	24.6%
Visit to Winery, brewery, distillery	11.3%	14.9%	21.5%
Dog walking	13.2%	10.3%	10.8%
Canoeing/ kayaking/ rafting	10.4%	13.8%	6.2%
Climbing	9.4%	9.2%	7.7%
Mountain biking	3.8%	8.1%	12.3%
Hunting	1.9%	4.6%	13.9%
Interpretive programs/ exhibits	3.8%	3.5%	9.2%
Water-skiing	0.9%	4.6%	6.2%

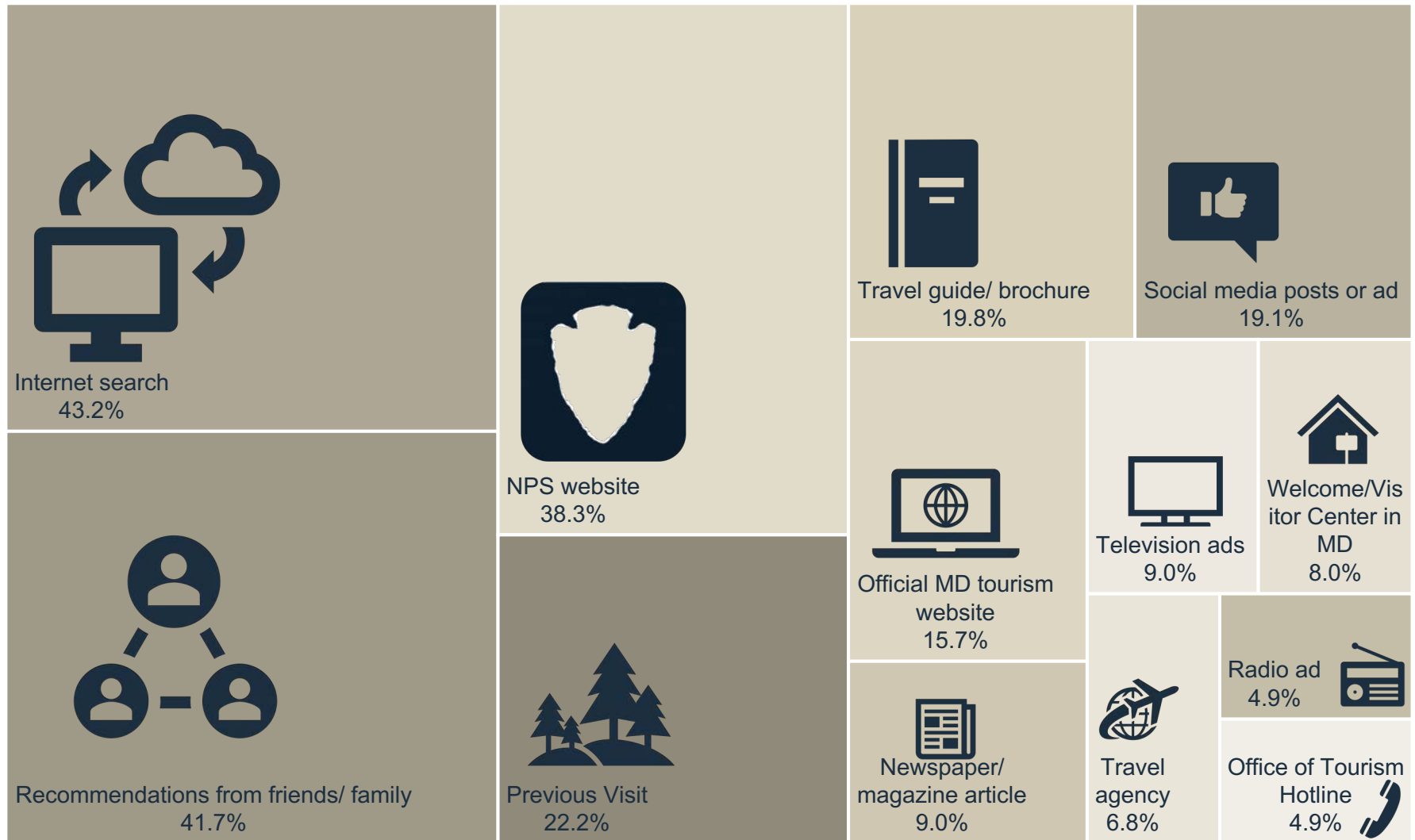
Q: Please select the activities that members of your party participated in, either in or outside the C&O Canal NHP National Park, during your most recent visit? *(select all that apply)*

Heat Map Table Comparing Activity Participation Among **In-State** vs **Out-of-State** Visitors

Activity	In-State Visitor <i>(Maryland Resident)</i>	Out of State Visitor <i>(Regional visitor residing in neighboring state)</i>
Hiking/ walking	76.5%	66.0%
Sightseeing	54.4%	52.3%
Photography	41.2%	35.9%
Shopping	36.8%	43.0%
History/ cultural interest	33.8%	30.5%
Pleasure driving	32.4%	29.7%
Dining locally	32.4%	42.6%
Birding/ wildlife viewing	25.0%	16.4%
Picnic/ cook-out	22.1%	27.0%
Swimming	19.1%	19.5%
Visit to a museum or attraction	16.2%	27.7%
Bicycling on pavement	14.7%	15.6%
Dog walking	13.2%	14.5%
Canoeing/ kayaking/ rafting	13.2%	12.1%
Fishing	13.2%	16.0%
Visit to Winery, brewery, distillery	13.2%	14.1%
Playground	10.3%	16.8%
Interpretive programs/ exhibits	7.4%	5.9%
Climbing	5.9%	11.7%
Mountain biking	4.4%	9.8%
Water-skiing	2.9%	4.3%
Hunting	1.5%	5.9%

Q: Please select the activities that members of your party participated in, either in or outside the C&O Canal NHP National Park, during your most recent visit?
(select all that apply)

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

C&O Canal NHP Visitor Information Sources Used in Trip Planning

Heat Map Table Comparing Information Sources Used to Plan Visit Among **Day and Overnight Visitors**

Information Sources Used to Plan Visit	Day Trip	Overnight
Internet search	43.3%	43.2%
Recommendations from friends/family	38.6%	43.7%
NPS website	34.7%	40.6%
Previous Visit	30.7%	16.8%
Travel guide/ brochure	5.5%	28.9%
Social media	11.0%	24.4%
Official tourism website	10.2%	19.3%
Newspaper/ magazine article	2.4%	13.2%
Television ads	1.6%	13.7%
Recommendation from staff at a Welcome/Visitor Center in MD	3.2%	11.2%
Travel agency	0.0%	11.2%
Radio ad	2.4%	6.6%
Telephone assistance from an Office of Tourism	2.4%	6.6%

Heat Map Table Comparing Information Sources Used to Plan Visit Among **First Time and Repeat Visitors**

Information Sources Used to Plan Visit	First Time	Repeat
Internet search	46.3%	38.2%
Recommendations from friends/family	44.8%	36.6%
NPS website	39.3%	36.6%
Previous Visit	0.0%	51.2%
Travel guide/ brochure	20.9%	17.9%
Social media	19.9%	17.9%
Official tourism website	18.4%	11.4%
Newspaper/ magazine article	9.0%	8.9%
Television ads	7.5%	11.4%
Recommendation from staff at a Welcome/Visitor Center in MD	6.5%	10.6%
Travel agency	5.5%	8.9%
Radio ad	3.5%	7.3%
Telephone assistance from an Office of Tourism	5.0%	4.9%

Q: What information sources did you use to plan your most recent visit to the C&O Canal NHP National Park? *(select all that apply)*

C&O Canal NHP Visitor Information

Sources Used in Trip Planning

Heat Map Table Comparing Information Sources
Used to Plan Visit Among Various **Age Cohorts**

Activities Participated In During Visit	34 or younger	35 to 44	45 or older
Internet search	36.8%	47.4%	46.4%
Recommendations from friends/family	42.5%	37.9%	47.6%
NPS website	33.0%	36.8%	40.5%
Previous Visit	17.9%	23.2%	28.6%
Travel guide/ brochure	25.5%	22.1%	8.3%
Social media	21.7%	21.1%	9.5%
Official tourism website	12.3%	13.7%	22.6%
Television ads	8.5%	16.8%	3.6%
Newspaper/ magazine article	7.6%	14.7%	4.8%
Recommendation from staff at a Welcome/Visitor Center in MD	8.5%	9.5%	3.6%
Travel agency	7.6%	9.5%	1.2%
Telephone assistance from an Office of Tourism	3.8%	7.4%	4.8%
Radio ad	7.6%	4.2%	2.4%

Heat Map Table Comparing Information Sources
Used to Plan Visit Among Various **Income Cohorts**

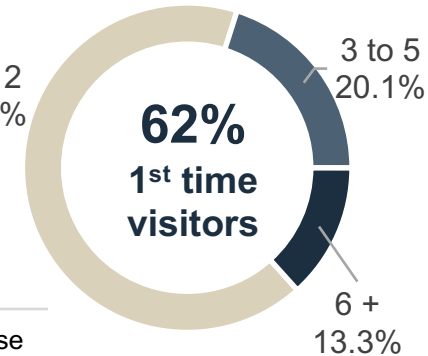
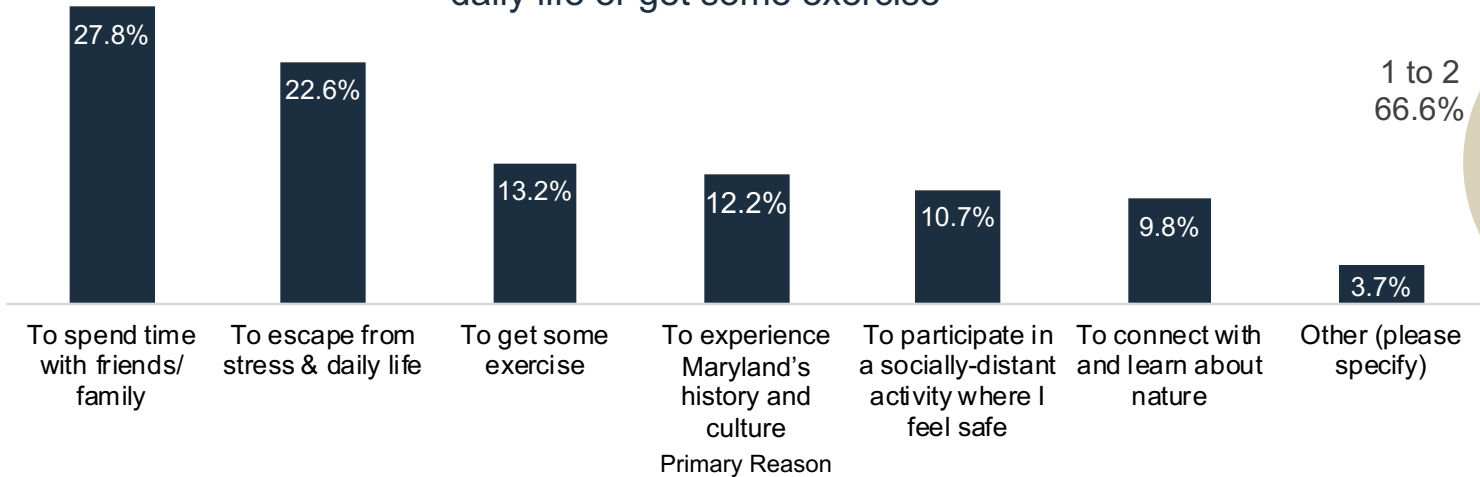
Information Sources Used to Plan Visit	HHI Less than \$75K	HHI \$75K to \$124.9K	HHI \$125K or more
Internet search	44.3%	44.7%	45.3%
Recommendations from friends/family	46.2%	36.5%	48.4%
NPS website	34.9%	41.2%	40.6%
Previous Visit	19.8%	23.5%	26.6%
Travel guide/ brochure	15.1%	22.4%	23.4%
Social media	16.0%	17.7%	25.0%
Official tourism website	17.0%	15.3%	17.2%
Television ads	3.8%	7.1%	25.0%
Newspaper/ magazine article	5.7%	7.1%	18.8%
Recommendation from staff at a Welcome/Visitor Center in MD	3.8%	8.2%	14.1%
Travel agency	1.9%	3.5%	15.6%
Radio ad	2.8%	5.9%	7.8%
Telephone assistance from an Office of Tourism	4.7%	5.9%	4.7%

Q: What information sources did you use to plan your most recent visit to the C&O Canal NHP National Park? *(select all that apply)*

C&O Canal NHP Trip Motivation & Timing

46% visit the C&O Canal NHP to spend time with friends or family, escape from daily life or get some exercise

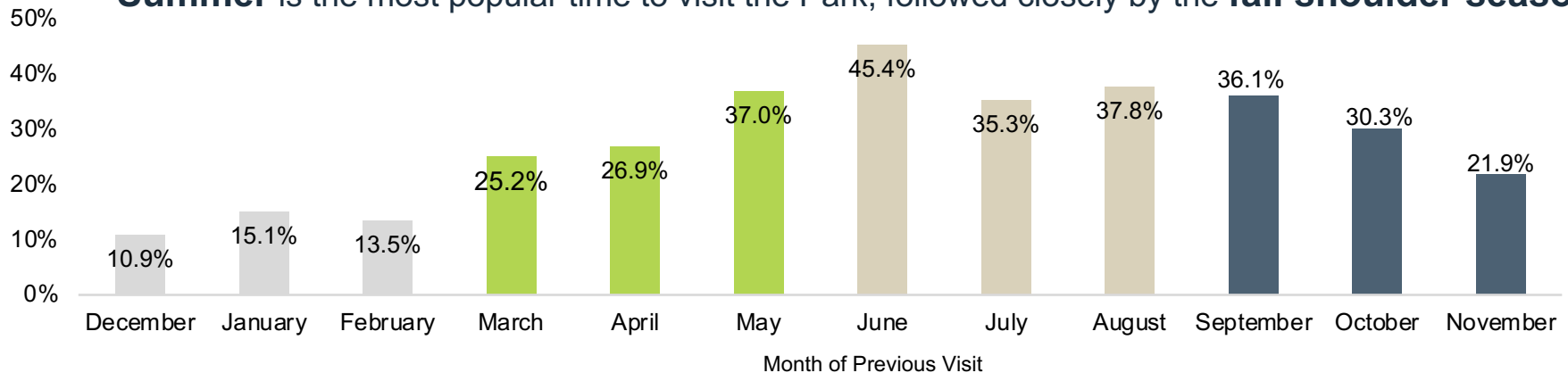
Number of Times Visited



Q: Including your most recent trip, how many times have you visited the C&O Canal NHP National Park?
N: 327

Q: What best describes your primary reason for your most recent visit to the C&O Canal NHP National Park?
N: 327

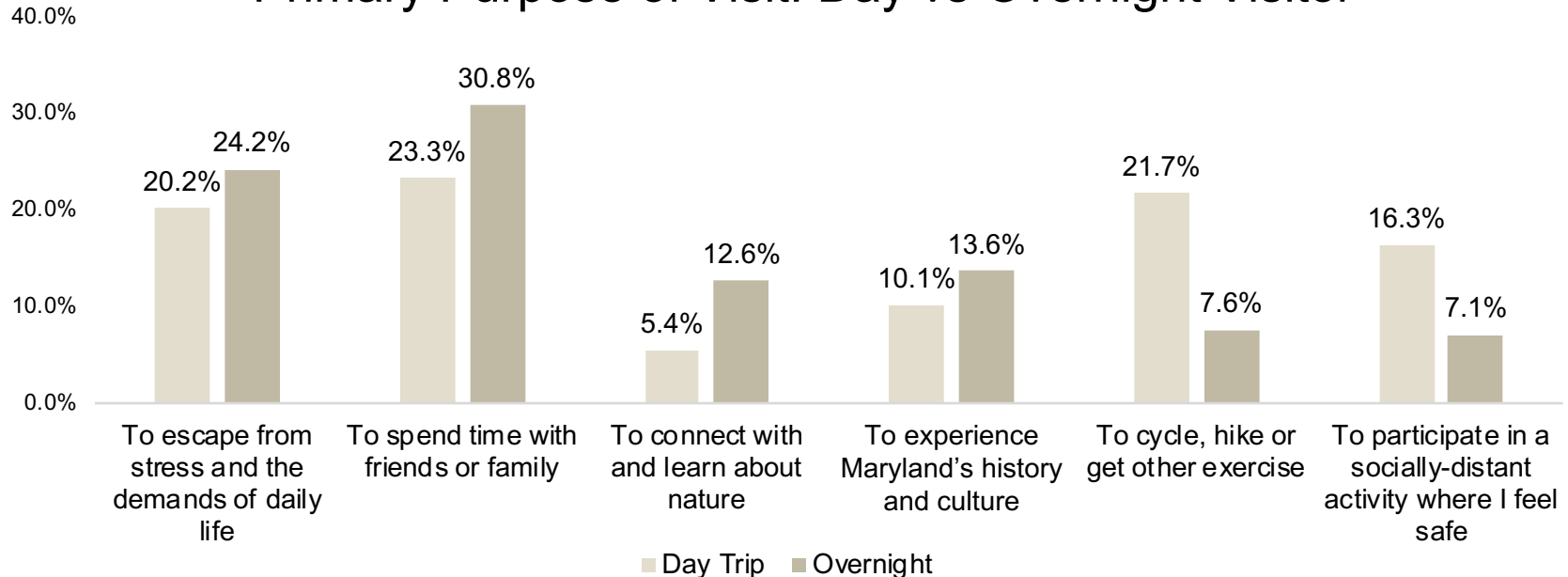
Summer is the most popular time to visit the Park, followed closely by the **fall shoulder season**



Q: Thinking back on your previous trips, during what months did you visit the C&O Canal NHP National Park? (select all that apply)
N: 119

Primary Purpose of Visit: Day Trip Visitors vs Overnight Visitors

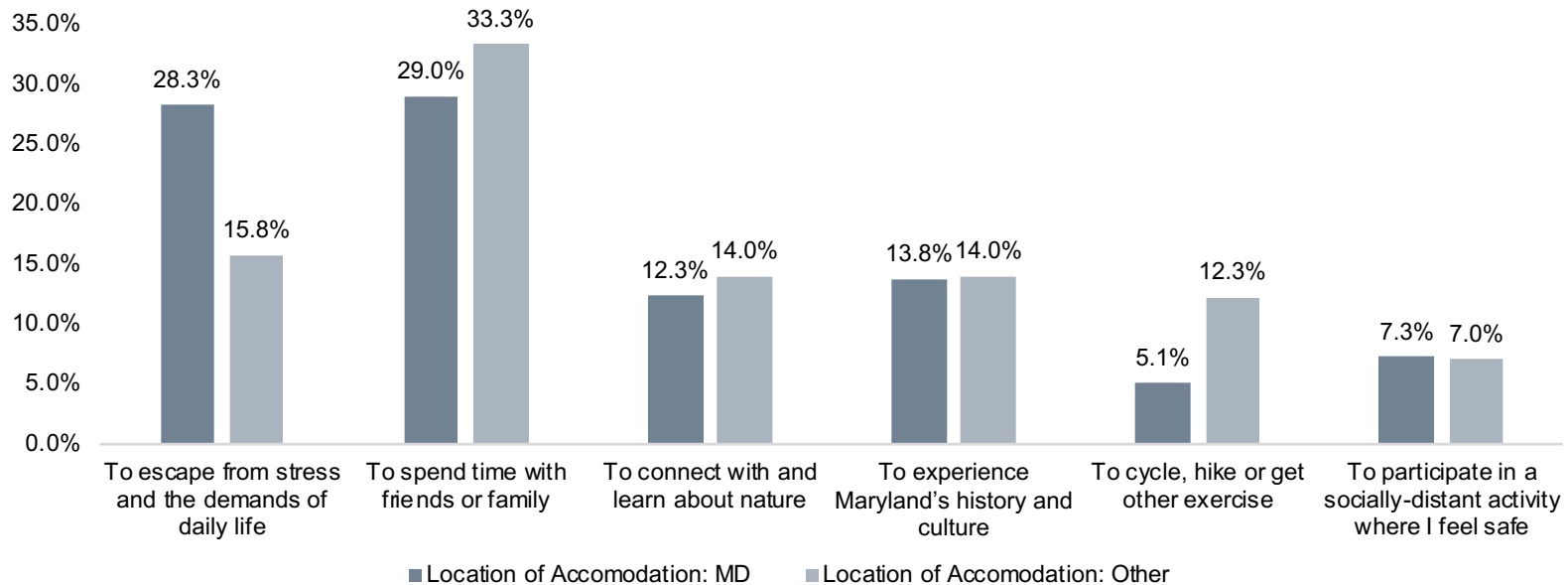
Primary Purpose of Visit: Day vs Overnight Visitor



- Over one-quarter (28%) of visitors to the C&O Canal NHP identified spending time with friends and family as the primary reason for their visit.
- Overnight visitors were even more likely to name spending time with friends and family as the primary reason for their park visit (30.8%).
- Overnight visitors are also more likely than day-trippers to name escaping the stress and demand of daily life, connecting and learning about nature and experiencing Maryland's history and culture as primary reasons for their visit.
- Day visitors, on the other hand, are significantly more likely to name cycling, hiking or getting other exercise of using the park to participate in socially distant activity as primary reasons for their visit.

Primary Purpose of Overnight Visit By Location of Lodging Accommodations

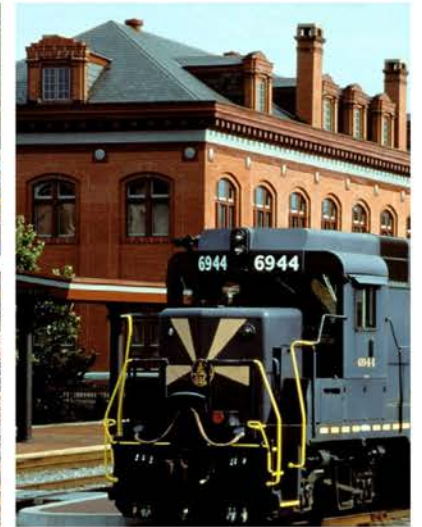
Primary Purpose of Visit by Location of Accommodations



- Visitors whose primary accommodations are located in Maryland are less likely than those with accommodations in VA, WV or DC to name spending time with friends or family (29%) or cycling, hiking or getting other exercise (5.1%) as the primary reasons for their trip to the C&O Canal NHP .
- Conversely, visitors with lodging accommodations located in Maryland were significantly more likely to name escaping the stress and demands of daily life as the primary motivation for their trip.

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

Economic Impact Assessment



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 Historical 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

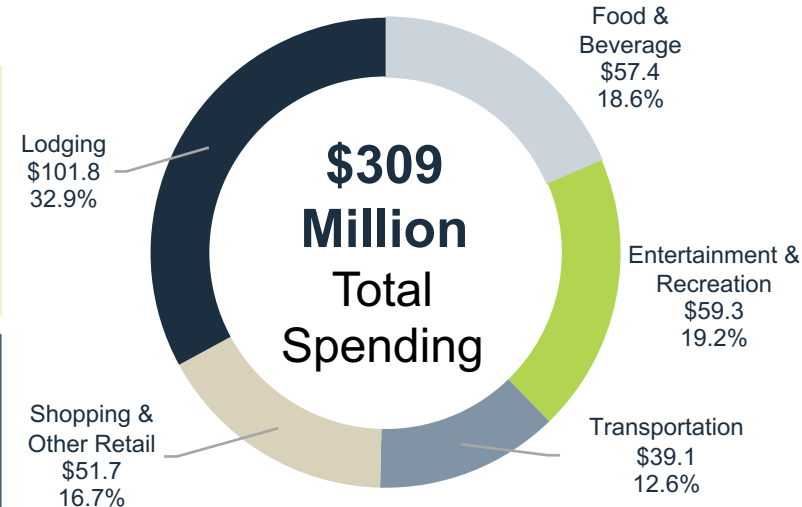


Per Day: \$13.3
Per Trip: \$42.4
Per Party: \$121.6
Total: \$39 Million

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)

The Impact of C&O Canal NHP Tourism in Maryland

2019 Economic Impact Summary

(Currency Figures in Millions \$)

2019 Metric	Direct	Indirect	Induced	Total
Total Visitors (outside of 50 miles)				1.31 Million
Total Visitor Spending*				\$309.2
Economic Impact	\$151.8	\$51.2	\$50.5	\$235.5
Wages	\$97.2	\$30.4	\$28.3	\$155.9
Jobs	2,948	425	530	3,902
Tax Receipts Total				\$82.8
Tax Receipts Federal				\$36.4
Tax Receipts State and Local				\$46.4

Sources: DK Shifflet & Associates, STR, NPS, UberMedia, IMPLAN, Maryland Comptroller, Rockport Analytics

* Spending totals include only spending by “main purpose” visitors since their presence in the area can be directly attributed to the C&O Canal NHP. Results from our survey of visitors show that 70% of visitors who travel more than 50 miles say that the C&O Canal NHP was their primary reason for being in the area was the park.

- In 2019, visitors who traveled more than 50 miles and whose primary reason for being in the area was the C&O Canal NHP spent an excess of \$309 million in the local economy on travel-related goods and services. On average, these “main purpose” visitors spent and estimated \$105 per day or \$335 per trip in the region.
- Spending by “main purpose” visitors resulted in \$235 million in economic impact across the four Maryland counties in the region (Montgomery, Frederick, Washington and Allegany). Nearly \$152 million of this economic impact went to businesses that directly support visitor activity.
- C&O Canal NHP visitor spending supported more than 3,900 Maryland jobs (full-time and part-time), paying \$156 million in total wages.

Economic Progression of C&O Canal NHP Visitor Activity Across the Region



Expenditures by C&O Canal NHP Visitors



2019 @
\$309.2
million



Expenditures include:

Hotel, food and beverage (F&B), transportation, shopping, recreation, etc., from out-of-area visitors to the C&O Canal NHP

C&O Canal NHP Visitor Contribution to the Economy



Retained in the
Local Economy
\$235.5 million

Minus Import
Leakages
-\$55.6 million

The region retains about 82 cents of every dollar spent in the local area by visitors

Leakages refer to goods & services that are imported into the region from outside due to insufficient local supply

Value to Businesses Across the C&O Canal NHP Region in Maryland

Direct Industry
GDP
\$151.8 million

Indirect & Induced
Industry GDP
\$101.7 million

Total Jobs*
Supported
3,902

Direct Industry GDP refers to businesses that serve C&O Canal NHP visitors (e.g. hotels, restaurants, retail, entertainment)

Indirect & Induced GDP refers to activity generated by supply chain businesses and the resulting expenditures the employees if these businesses

*Full & part time jobs

C&O Canal NHP Visitor-Supported Economic Impact in the Region in 2019

2019 C&O Canal NHP Visitor-Initiated Economic Impact (Value Added) (\$Thousands)

Industry (NAICS) ¹	Direct	Indirect	Induced	Total
Accommodation & food services	\$98,632	\$1,175	\$2,903	\$102,710
Arts- entertainment & recreation	\$32,712	\$504	\$669	\$33,885
Retail trade	\$15,484	\$928	\$5,424	\$21,836
Real estate & rental	\$3,345	\$14,925	\$13,865	\$32,135
Transportation & Warehousing	\$1,667	\$2,115	\$647	\$4,429
Ag, Forestry, Fish & Hunting	-	\$7	\$10	\$16
Mining	-	\$8	\$9	\$17
Utilities	-	\$1,131	\$370	\$1,501
Construction	-	\$1,127	\$438	\$1,566
Manufacturing	-	\$306	\$170	\$475
Wholesale Trade	-	\$1,543	\$1,784	\$3,327
Information	-	\$6,499	\$2,683	\$9,182
Finance & insurance	-	\$4,517	\$5,040	\$9,557
Professional- scientific & tech services	-	\$6,453	\$2,444	\$8,897
Management of companies	-	\$3,883	\$531	\$4,414
Administrative & waste services	-	\$4,532	\$1,628	\$6,161
Educational svcs	-	\$186	\$937	\$1,123
Health & social services	-	\$3	\$8,039	\$8,042
Other services	-	\$1,353	\$2,900	\$4,253
Government & Non-NAICS	-	\$-3	\$4	\$1
Total	\$151,839	\$51,192	\$50,495	\$253,526

- Spending by visitors to the C&O Canal NHP surpassed \$309 million in 2019 resulting in more than \$253.5 million in total economic impact (value added) for the local area.
- Nearly \$152 million of this impact was generated in industries that directly support visitor activity such as accommodation & food services and arts- entertainment & recreation
- Supply chain and other downstream businesses in the region also benefited from the “net-new” dollars that were injected into the economy by these visitors. These businesses received nearly \$102 million in value added in 2019.
- Numerous industries across the region that are not typically associated with travel and tourism also benefit from visitor spending such as, finance & insurance and health & social services.

Sources: Rockport Analytics, IMPLAN

¹North American Industrial Classification System (NAICS). For specific industry definitions, see www.census.gov

C&O Canal NHP Visitor-Supported Employment in the Region in 2019

2019 C&O Canal NHP Visitor-Initiated Employment

Industry (NAICS)*	Direct	Indirect	Induced	Total**
Accommodation & food services	1,848	34	69	1,951
Arts- entertainment & recreation	770	26	18	814
Retail trade	284	16	88	388
Transportation & Warehousing	40	32	12	83
Real estate & rental	6	53	20	79
Ag, Forestry, Fish & Hunting	-	-	-	1
Mining	-	1	-	1
Utilities	-	2	1	3
Construction	-	14	5	19
Manufacturing	-	3	1	4
Wholesale Trade	-	9	10	19
Information	-	16	8	24
Finance & insurance	-	30	34	65
Professional- scientific & tech services	-	66	26	91
Management of companies	-	20	3	22
Administrative & waste services	-	79	29	108
Educational svcs	-	7	23	30
Health & social services	-	-	115	115
Other services	-	18	66	84
Government & Non NAICS	-	1	1	2
Total 2019	2,948	425	530	3,902

- Spending initiated by C&O Canal NHP visitors supported nearly 2,950 direct jobs in the region. An additional 954 jobs were supported by the tourism supply chain and other downstream businesses.
- More than 6 in 10 of these direct jobs (62%) were in the accommodations & food services sectors and another 26% direct jobs were supported in the arts, entertainment and recreation sector.
- As spending from visitors moves through the local economy, other sectors that are not usually associated with tourism also benefit. For example, the administrative & waste services the and professional, scientific & tech services sectors together employed about 200 indirect and induced workers.

Sources: Rockport Analytics, IMPLAN

*North American Industrial Classification System (NAICS). For specific industry definitions, see www.census.gov

C&O Canal NHP Visitor-Supported Wages in the Region in 2019

2019 C&O Canal NHP Visitor-Initiated Wages (\$Thousands)

Industry (NAICS) ¹	Direct	Indirect	Induced	Total
Accommodation & food services	\$61,783	\$1,127	\$1,910	\$64,820
Arts- entertainment & recreation	\$21,831	\$372	\$397	\$22,601
Retail trade	\$10,483	\$618	\$3,341	\$14,442
Real estate & rental	\$2,111	\$4,124	\$1,659	\$7,895
Transportation & Warehousing	\$986	\$1,863	\$536	\$3,386
Ag, Forestry, Fish & Hunting	-	\$4	\$7	\$11
Mining	-	\$2	\$2	\$5
Utilities	-	\$393	\$149	\$542
Construction	-	\$885	\$348	\$1,233
Manufacturing	-	\$178	\$71	\$249
Wholesale Trade	-	\$833	\$963	\$1,796
Information	-	\$3,986	\$1,199	\$5,185
Finance & insurance	-	\$2,910	\$3,166	\$6,076
Professional- scientific & tech services	-	\$5,205	\$1,937	\$7,142
Management of companies	-	\$3,156	\$431	\$3,587
Administrative & waste services	-	\$3,546	\$1,275	\$4,821
Educational svcs	-	\$182	\$892	\$1,073
Health & social services	-	\$2	\$7,239	\$7,242
Other services	-	\$966	\$2,731	\$3,696
Government & Non-NAICS	-	\$67	\$66	\$132
Total	\$97,195	\$30,420	\$28,317	\$155,932

Sources: Rockport Analytics, IMPLAN

¹North American Industrial Classification System (NAICS). For specific industry definitions, see www.census.gov

- Employees in industry sectors that are directly supported by visitor spending received more than \$97 million in wages in 2019.
- An additional \$59 million in wages were paid to employees of supply chain and other downstream businesses.
- Across the four-county region in Maryland, the average wage of all the employees supported by visitor spending was \$39,961 in 2019.
- Most of the wages paid to local employees will continue to flow through the economy as these dollars are spent by individuals on goods and services throughout the region and state.

Expenditures by C&O Canal NHP Visitors in 2019 Supported \$26.4 M in State Taxes

2019 C&O Canal NHP Visitor-Initiated Taxes

	2019 (\$Thousands)	Share of Category Total*
Federal – U.S.		
Corporate Income	\$4,439.3	12.3%
Personal Income	\$12,716.9	34.9%
Excise & Fees	\$2,745.7	7.5%
Social Security & Other Taxes	\$16,502.5	45.3%
Federal Tax Total	\$36,404.4	100%
State – Maryland		
Corporate Income	\$660.9	2.4%
Personal Income	\$5,620.6	20.7%
Social Insurance Taxes	\$212.6	0.8%
Other Business Taxes	\$1,372.3	5.0%
Other Household Taxes & Fees	\$588.6	2.2%
MD Rental Car Surcharge	\$21.5	0.1%
Sales Taxes	\$17,889.4	67.9%
Maryland Tax Total	\$26,375.9	100%
Local – Montgomery, Frederick, Washington & Allegany Counties		
Hotel Occupancy Tax	\$6,908.9	34.5%
Property Taxes	\$12,707.1	63.4%
Other Licenses, Fines & Fees	\$419.9	2.1%
Local Tax Total	\$20,035.9	100%
Total Tourism - Supported Taxes	\$82,816.2	

Spending by Visitors to the C&O Canal NHP in 2019 Supported More than \$83.6 Million in Total Taxes.

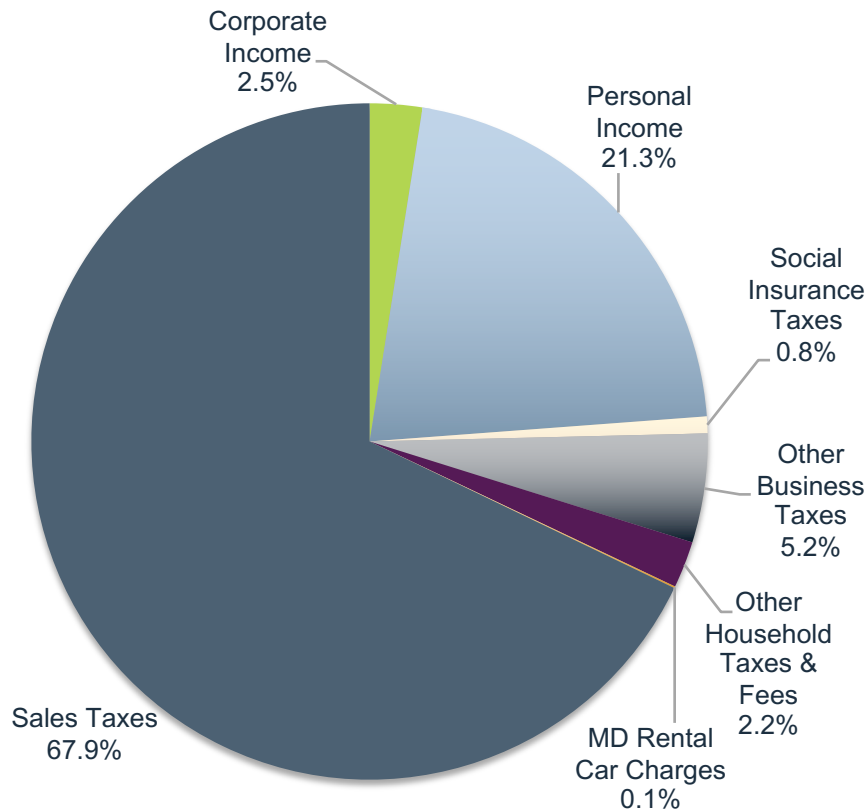
- Spending from visitors to the C&O Canal NHP resulted in more than \$36.4 million in Federal Taxes in 2019. These taxes represented almost 44% of total visitor-initiated tax revenues.
- The Maryland sales tax revenues attributed to visitor-initiated spending reached almost \$17.9 million in 2019. State sales taxes represented nearly 39% of the combined state and local tax collections supported by visitation to the C&O Canal NHP and 68% of the state total.
- Spending by overnight visitors contributed nearly \$7 million in hotel taxes to the counties. Hotel taxes represented more than 34% of the local tax revenues supported by visitation to the area.
- Without the C&O Canal NHP, the 546,910 households across Montgomery, Frederick, Washington and Allegany counties in Maryland would each have to pay almost \$85 more in state & local taxes to maintain current levels of state and local tax receipts.

Sources: Rockport Analytics, IMPLAN, MD Office of Tourism Development, MD Comptroller

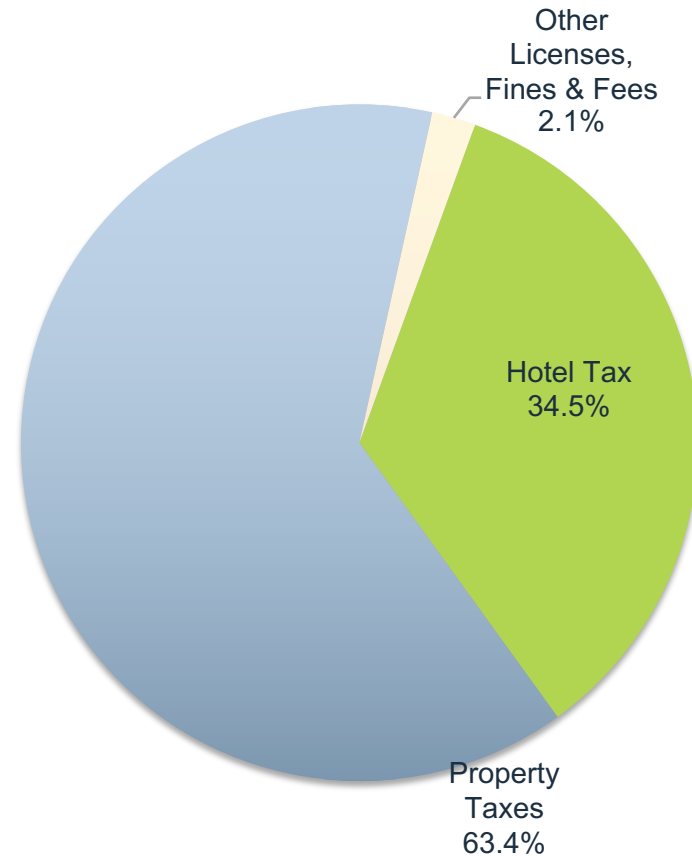
*Not all categories sum to 100% due to rounding

Expenditures by C&O Canal NHP Visitors in 2019 Supported \$20 M in Local Taxes

2019 C&O Canal NHP Visitor-Initiated State Taxes
\$26.4 Million



2019 C&O Canal NHP Visitor-Initiated Local Taxes
\$20 Million



Sources: Rockport Analytics, IMPLAN, MD Office of Tourism Development, MD Comptroller

How Does Visitation to the C&O Canal NHP Benefit Maryland and the Region

Helping to Relieve the Tax Burden of Maryland Households



- Without the C&O Canal NHP, the 546,910¹ households across Montgomery, Frederick, Washington and Allegany counties in Maryland would each have to pay \$85 more in state & local taxes to maintain current levels of state & local tax receipts.
- Visitor spending transactions were responsible for more than 53% of the total state & local taxes attributable to visitation. Tourism dollars spent by “main purpose” visitors from outside 50 miles are “net-new” to the local economy.
- For every \$1 spent by visitors in 2019, the economies of the four-county region in Maryland retained about 82 cents. About 15 cents of visitor spending is retained as state and local tax revenue.

Contributing to Public Education



- The state & local taxes collected from visitor spending to the C&O Canal NHP were enough to educate 3,084 Maryland public school students for one school year.²
- The state & local taxes supported by C&O Canal NHP visitors were enough to cover the annual starting salary of 659 Maryland public school teachers.³

Sources: IMPLAN, Rockport Analytics, Bureau of Economic Analysis, US Census, National Education Association (NEA) State Rankings 2019, National Park Service

¹ Population estimates from the US Census Bureau

² Estimate based on the average, annual cost per student in 2019 of \$15,049

³ Estimate based on the average, annual salary of a Maryland public school teacher of \$70,463 in 2019

⁴ National Park Service

⁵ Rockport Survey of C&O Park Visitors, Fall 2020

Showcasing the Region's Historic & Natural Treasures



- In 2019 the C&O Canal NHP attracted more than 5.1M⁴ visitors from all over the world to the region with more than 1.3 M of them traveling over 50 miles
- These 1.3 M park visitors also visited an average of 3.6 towns or cities in the area during their trip.
- Towns or cities in Maryland saw an excess of 4.1 M visits from C&O Canal NHP visitors.
- 9 in 10 survey respondents who visited the park said they would plan a return visit.⁵

Benefiting State & Local Businesses



- Spending by visitors to the C&O Canal NHP generated top-line sales totaling more than \$309 M, resulting in almost \$253.5 M in economic impact.
- Regional businesses that directly supported visitors saw value-added of almost \$152 M.
- Supply chain businesses across the region received value-added of almost \$102 M.

Promoting a Healthy Job Market



- C&O Canal NHP visitor-initiated spending supported more than 3,900 full- and part-time jobs in the region with an average annual wage of \$39,960.
- Approximately 50 cents of every dollar spent by visitors goes towards the wages of employees in the local area working in the town's restaurant, lodging, recreation and retail establishments.

C&O Canal Park & Regional Visitation

- In 2019 the C&O Canal NHP welcomed an estimated 1.3 million visitors who traveled from more than 50 miles. An estimated 504,000 visitors traveled from Maryland or neighboring states with the remaining 757,500, coming from other parts of the US.
- Aside from the visitors that come from neighboring states, the park has a relatively strong draw from markets in the Mid-Atlantic and the South-Atlantic regions. These two regions combined accounted for more than 379,300 visitors.
- Aside from the metro areas in Maryland and its neighboring states, visitors to the park travel from the following three markets 1) The drive markets North and West of Maryland (Johnstown-Altoona, Pittsburgh, PA, and Cleveland-Akron-Canton, OH), 2) From metro areas with short non-stop flights to airports in the region (BWI, Dulles, Reagan National) such as Atlanta, Boston, Charlotte and Chicago and 3) Longer-haul metro areas in Texas and in Florida that are home to robust air travel routes (Miami-Fort Lauderdale, Orlando-Daytona Beach-Melbourne, Tampa-St. Petersburg, Sarasota and Dallas-Ft. Worth and Houston)
- More than half a million visitors (521,000) visited the park in the Summer months in 2019, but visitation remained strong through the Fall shoulder season (335,240). Combined the Fall and Spring seasons make up almost half of all visitors to the park or nearly 653,500.
- Regional visitors that travel less than 100 miles are visiting in the summer and fall seasons. The winter season sees more visitors that travel more than 100 miles. The spring season sees more visitors that travel for even longer distances (more than 300 miles). The park's ability to attract longer-haul, overnight visitation during the park's slowest season is good news for the regional towns that are dependent on tourism.
- Visitors explored multiple locations within the C&O Canal NHP and in 2019 they visited an average of 1.5 park sections. The Maryland sections of the park that saw that most visitors correspond to Montgomery and Washington Counties. The Washington is the lengthiest section of the park and the Montgomery section is located in the most densely populated county in the state.
- Of the 4.8 million town visits generated by park visitors, Maryland towns/cities saw 4.3 million visits and towns in Virginia and West Virginia saw more than 414 thousand visits. In 2019, more than half of all town visits to towns in Maryland (56%) were to towns in Montgomery County. Of all the towns in Maryland, Bethesda and Rockville received the most visits.

C&O Canal Park Visitor Demographics & Trip Characteristics

- The majority of visitors to the C&O Canal NHP (60%) stayed on overnight visits with the remaining 40% visiting on day trips. The average party size was 3.1 and the average length of stay was 2.5 days.
- 62% of park visitors surveyed were first time visitors. One in three visitors has visited the C&O Canal NHP 3 times or more.
- Park visitation really ramps up in May and June and then stays strong through the fall shoulder season. Over the last 12 months, 45% of respondents visited the park in June, the busiest month, which was followed by August when 38% visited.
- The average households income of park visitors is \$96k, significantly higher than the \$60k national average. Visitors are well distributed across age cohorts with an average visitor age of 40.
- Over half (55%) of park visitors are married and park visitors are relatively well-educated: 42% have an associates or bachelors degree and another 28% have at least a masters degree.

C&PO Canal Park Visitor Lodging & Accommodation Choice

- Nine out of ten overnight visitors stayed in paid accommodations with 51% of stays in traditional hotels with the other half split among lodges, cabins and cottages, B&Bs, VFR, campgrounds and peer-to-peer rentals (e.g., Airbnb, VRBO).
- Primary accommodations for over 70% of overnight visitors were located in Maryland; 14% in Virginia, 11% in DC and 4% in West Virginia.
- Maryland is more likely to attract overnight stays from those over 45 and with household incomes between \$75K and \$125K.
- Park visitors with lodging accommodations in Maryland are more likely to stay in a traditional hotel or a B&B than those staying in outside MD. Conversely, visitors staying in Maryland lodging are less likely to stay at a campground or cottage.
- The top 5 towns visited during visitors' latest C&O Canal NHP trip include: Frederick, MD (25.3%), Hagerstown, MD (21.5%), Leesburg, VA (20.5%), Potomac, MD (19.2%), Rockville, MD (18.3%) Harpers Ferry, WV (14.1%).
- Towns that visitors were most likely to visit on a future trip include: Harpers Ferry, Frederick, Potomac, Leesburg, Hagerstown, and Cumberland.

Visitor Activities & Trip Planning

- Hiking/walking is the #1 activity among park visitors with 68% of visitors taking part in the activity. This is followed in popularity by sightseeing, shopping, dining, photography and history and cultural activities.
- Repeat visitors are more likely to take part in activities like cycling on pavement, bird watching, fishing and mountain biking than first time visitors.
- Younger visitors (those under 35) are more likely to dine locally or shop on their trip than those in older age cohorts.
- Higher income visitors are more likely to take part in photography, swimming, cycling, fishing and visiting wineries or breweries than lower income visitors. Conversely, higher income households are less likely to take part in sightseeing or pleasure driving than lower income households.
- The internet and recommendations from friends or family are the top two information sources for those visiting the C&O Canal NHP . Older visitors and those with higher household incomes are even more likely to rely on recommendations from friends or family.
- 15.7% of visitors used the MD Tourism website to get information about their trip.

Trip Motivation

- Over one-quarter (28%) of visitors to the C&O Canal NHP identified spending time with friends and family as the primary reason for their visit.
- Day visitors are significantly more likely than overnight visitors to name cycling, hiking or getting other exercise or using the park to participate in socially distant activity as primary reasons for their visit.
- Visitors whose primary accommodations are located in Maryland are less likely than those with accommodations in VA, WV or DC to name spending time with friends or family (29%) or cycling, hiking or getting other exercise (5.1%) as the primary reasons for their trip to the C&O Canal NHP .

C&O Canal Park Visitor Spending

- In 2019, visitors who traveled more than 50 miles and whose primary reason for being in the area was the C&O Canal NHP spent an estimated \$309 million in the local economy on travel-related goods and services. On average, these “main purpose” visitors spent and estimated \$105 per day in the region and \$335 per trip.
- The largest spending category for C&O Canal visitors was lodging which made up 33% trip budgets on average. Higher lodging spend was driven by nearly 78% of “main purpose” visitors spending the night in the area and 81% staying in paid accommodations.

C&O Canal Park Economic Impact

- For every \$1 spent by C&O Canal visitors in 2019, the region retained about 82 cents in economic impact. About 15 cents of each visitor dollar is retained as state and local tax revenue and 50 cents of each visitor dollar goes toward paying the wages of employees in the region.
- C&O Canal NHP visitor-initiated spending supported more than a total of 3,900 full- and part-time jobs in the region in 2019. Of this total, almost 2,950 were in sectors directly supported by visitation such as accommodation & food services. The remained were supported through the supply chain of the tourism industry or through the ripple effect of resent wages. The employees throughout the region supported by C&O Canal visitor spending received a total of nearly \$156 million in wages in 2019.
- Visitor spending transactions were responsible for more than 53% of the total state & local taxes attributable to C&O Canal visitation. Hotel taxes represented more than 34% of the local tax revenues supported by C&O Canal visitation in 2019, totaling nearly \$7 million.
- Without the C&O Canal NHP, the 546,910 households across Montgomery, Frederick, Washington and Allegany counties in Maryland would each have to pay \$85 more in state & local taxes to maintain current levels of state and local tax receipts. The state & local taxes collected from visitor spending to the C&O Canal NHP were enough to educate 3,084 Maryland public school students for one school year.

- **Visitor** – Someone who has either stayed overnight (regardless of origin) or traveled a distance of at least 50 miles one way during a day trip.
- **Value Added (or GSP)** – Refers to the total spending in an economy net of any leakages outside the state. The total spending reflects the difference between revenues and expenses on intermediate inputs.
- **Employment** – Total employment is an annual average that accounts for seasonality and it refers to full-time, part-time, seasonal and self-employed workers.
- **Wages** – Wages reflect the combined cost of total payroll paid to employees (e.g., wages, salaries, benefits, payroll taxes) and payments received by self-employed individuals and/or unincorporated business owners.
- **Direct Impact** – Benefit that accrues to those County businesses that directly serve C&O Canal NHP visitors
- **Indirect Impact** – Benefit to the many local upstream firms that make up the supply chain of direct businesses.
- **Induced Impact** – Both direct and supply chain businesses pay wages to their workers. Most of the wages paid to local employees will be spent throughout the year at regional business that provide a broad range of consumer goods and services. This impact is sometimes referred to as the “ripple effect”.
- **Leakages** – The portion of gross spending that leaves the economy of the four counties as: (1) as profits to non-County headquartered businesses, (2) because of unavailable or insufficient local supply, (3) non-local vendor choice, and/or (4) from reduced downstream spending caused by savings, debt reduction, or excess inventories.





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