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COMMUNITY & ECONOMIC IMPACT STUDY

FOR THE HARRIET TUBMAN
UNDERGROUND RAILROAD BYWAY

Dorchester County Tourism Department

MAY 2021

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SPECIAL THANKS

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Cover Photo Source: <https://harriettubmanbyway.org/>



Photo source: <https://harriettubmanbyway.org/>

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EXECUTIVE SUMMARY

ABOUT THE STUDY

The 125-mile scenic Harriet Tubman Underground Railroad Byway (the “Byway”) traverses some of the most beautiful landscapes and waterscapes of Maryland’s Eastern Shore. As a result of this study, it is better understood who is traveling the Byway, what they do during their visit, and how much they contribute to the local economy during their stay.

The Dorchester County Tourism Office, in partnership with the Maryland Heritage Areas Authority, Maryland Office of Tourism, Maryland Park Service, and National Park Service sought to quantify the economic impact of visitors to the Byway. To do this, Camoin 310, a full-service community and economic development firm, completed a literature and data review, comprehensive 6-month survey, economic and fiscal impact analysis, community and quality of life analysis, and provided strategic marketing recommendations.

MAJOR FINDINGS

Based on a survey completed in-person and online, the average size of the visiting party was 3 people, and the average length of stay was 1.6 days. The majority of respondents were visiting for the historical significance of the area (74%) and most (72%) gave the highest ranking when asked how important the Byway was in their decision to come to the area. **58% of visitors were from outside Maryland** and **96% were from outside Dorchester and Caroline Counties**. In addition to visiting the Byway, 27% of respondents dined in the area, 21% visited other historic sites, 10% shopped, 10% hiked, and 10% traveled to the shores and beaches. On average, people spent \$92 per person per day.

Findings from the survey were used to complete an economic and fiscal impact analysis. Based on 251,155 net new visitors to the Byway each year, they contribute **\$23 million in sales annually to the area**. These direct sales have multiplier effects in the area and in sum, **support 363 jobs for \$9.9 million in earnings** and a total of **\$30.1 million in sales**. Fiscally, **\$115,000 can be attributed to Caroline County** and **\$682,000 can be attributed Dorchester County** in annual tax revenue (hotel rental tax and property tax).

The study shows the benefits of living in areas rich with environmental, cultural, and historical resources to signify how they add to resident’s quality of life. Their benefits draw residents, creative jobs, preserve and increase property values, provide access to outdoor recreation, and provide important environmental functions like stormwater management and flood protection. Based on US Army Corps of Engineers data and findings from the visitor survey, the Byway provides an additional value of **\$187,000 annually to locals for general recreational use**.

Interviews signified the importance of Harriet Tubman’s presence in the area on the tourism economy. Interviews found how businesses and organizations pivoted throughout the COVID-19 pandemic, and the potential for additional collaboration between the Visitor Center and downtown Cambridge. There were also moving stories of how the Byway has impacted the Black and African American community.

As a result of the analysis and a review of current marketing initiatives, strategic marketing recommendations were provided. These were categorized in to certain themes to evaluate and amplify existing efforts, increase collaboration, continue to cross market among all the tourism organizations, and further connect to downtown.

HARRIET TUBMAN UNDERGROUND RAILROAD BYWAY

ECONOMIC IMPACT

IN ADDITION TO VISITING THE BYWAY...



27% Dine



21% Visit Other Sites



10% Shop



10% Visit Beaches



10% Hike

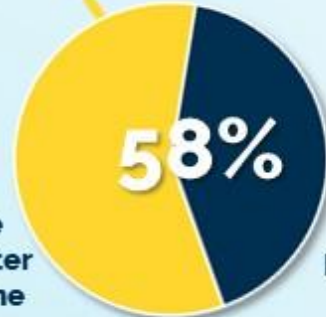
260,000 Visitors

since the Harriet Tubman
Underground Railroad State
Park and Visitor Center opened
March 2017

VISITOR ORIGINS



from
outside
Dorchester
& Caroline
Counties



from
outside
Maryland

VISITOR PROFILE



Average party size: **3** people

Average length of stay: **1.6** days

Average daily spend: **\$92** per person

\$27.1 mil

Annual Visitor Spend
(85% new to the area)

296,000

Annual Visitors
(96% from outside the area)

INTRODUCTION & BACKGROUND

The Dorchester County Tourism Office and its partners are interested in quantifying the community and economic impact of visitors to the Harriet Tubman Underground Railroad Byway (the “Byway”). It is the intent of this study to generate support for future planning and marketing of this national treasure and provide better understanding and build enthusiasm for advancing educational, cultural, and humanitarian benefits of the Byway at the local, regional, state, national, and international levels.

The 125-mile scenic Byway traverses some of the most beautiful landscapes and waterscapes of Maryland’s Eastern Shore. Each year people travel from all over the world to learn about and appreciate the experiences of Harriet Tubman’s life efforts. As a result of this study, it is better understood who is traveling the Byway, what they do during their visit and impact the community, and how much they contribute to the local economy during their stay.

Harriet Tubman personified justice and equality, putting her own life at risk time and again, in very quiet, selflessly valiant attempts to bring meaning to the cruel and troubled world of her times. Today her story produces profound admiration and respect for all who come to know it. For children and adults, it inspires renewed confidence to fight the good fight to improve the world.

The **purpose of this study** is to answer the following questions:

- 1) What are the economic benefits of the Byway as seen through visitor spending?
- 2) How does the Byway impact the quality of life in the community?
- 3) How does the Byway add economic value to area citizens?
- 4) How can the HTUR Byway be promoted to enhance full use of the sites?

WORK COMPLETED

To answer these questions, the following work was completed from early 2020 through mid-2021.

Review of Data and Literature | To provide context and background to our work, stakeholders were contacted regarding relevant planning documents and studies that have been conducted on the Byway to date. In addition, desktop research was conducted to understand efforts completed in the past that have impacted the Byway’s development and visitor use.

Visitor Survey | A visitor survey was completed that was distributed via channels along the Byway and online. The survey polled where visitors were from, what they did and where they visited, and how much they spent in the area. The survey was open from September 2020 until March 2021 and captured past visitors in addition to those that visited during this time frame.

Impact Analysis | For this component, total usage, new visitation, new spending, and economic impacts (jobs, earnings, and sales) was calculated. The impact analysis contains a literature review of previous impact studies on other byways for context into other methodologies.

Community and Quality of Life Analysis | The impact analysis was supplemented with the impacts from residents and local spending. This includes a literature review and stakeholder interviews as well as a Direct Use Value Analysis to quantify how the Byway adds real economic value to area citizens. The Direct Use Value Analysis

expresses the value received as the amount of money residents would otherwise have to pay to private parties for the value of the amenities offered by the Byway.

Strategic Marketing Recommendations | This section examine ways the Byway can be promoted. Short term recommendations were provided based on the analysis completed in the previous tasks, and the pent-up demand for travel due to the pandemic. Strategies that work with the upcoming 200th birthday of Harriet Tubman were also considered.

ABOUT THE HARRIET TUBMAN UNDERGROUND RAILROAD BYWAY

The Harriet Tubman Underground Railroad Byway (the “HTUR Byway” or “Byway”) traverses the landscape Harriet Tubman used to free herself and other enslaved people. The Byway serves as a historical monument to the Underground Railroad, that network of safe houses, routes on both land and water, individuals, and places that served to help enslaved Blacks to freedom in Pennsylvania and beyond. Between 1810 and 1850, at the height of the Underground Railroad usage, an estimated 30,000 to 100,000 people escaped slavery.¹ A corridor management plan was created in 2007 to start the process for the HTUR Byway to become nationally recognized, examining the historic, recreational, and scenic intrinsic qualities of the area.

In October of 2009, the HTUR Byway in Dorchester and Caroline Counties received the All American Road designation by the US Department of Transportation Federal Highway Administration (FHWA).² Since its inception in 1991, the FHWA has recognized 150 roads around the country yet funding was pulled in 2012. The Reviving America’s Scenic Byways Act of 2019, passed in early 2019, initiated an application process for new byways and designated a round of new National Scenic Byways.³

HARRIET TUBMAN UNDERGROUND RAILROAD VISITOR CENTER

On the 100th anniversary of her death on March 13, 2013, the ground was broken on the Harriet Tubman Underground Railroad State Park and Visitor Center. Concurrently, the State of Maryland designated the 125-mile driving tour. The state park, located on 17-acres, contains nature trails, a legacy garden, an open-air pavilion, and a 15,000 square foot Visitor Center that accommodates an exhibit hall, theater, library, and a museum store. The Visitor Center opened in March 2017 and is co-managed and operated through a Cooperative Management Agreement and partnership between Maryland State Parks and the National Park Service. Both the Harriet Tubman Underground Railroad National Historical Park and National Underground Railroad Network to Freedom Program are housed at and operate from the state park.



Photo source: <https://harriettubmanbyway.org/harriet-tubman/#visitorcenter>

¹ The Harriet Tubman Underground Railroad Byway Corridor Management Plan, 2007

² <https://roads.maryland.gov/mdotsha/pages/pressreleasedetails.aspx?PagelD=818&newsId=517>

³ <https://ntaonline.com/lawmakers-move-to-revive-national-scenic-byways-program/>

VISITOR SURVEY

To understand how visitors interact with the Byway, a two-phase survey that combined online and in-person data collection was implemented to measure travel trends associated with participation in Byway-related activities and expenditures. The results were used to determine the overall economic impact of the Byway in Dorchester and Caroline counties.

DEVELOPMENT & DISTRIBUTION

From September 2020 and to March 2021, a survey was conducted to evaluate the impact of Byway-related tourism spending on Dorchester and Caroline counties. In response to public health challenges related to the COVID-19 pandemic, the survey was conducted in an online-only format.

This online survey was created and used to gather information from those who have visited the HTUR Visitor Center, the Dorchester County Visitor Center, or any of the points of interest along the Byway. The steering committee distributed the online survey through their consumer social media, website and e-newsletters channels.

As sites began to open to on-site visitors, an intercept survey was initiated for visitors to complete in person and made available for major sites along the Byway. An intercept survey directly asks people to complete a survey based on their current experience of interacting with something, in this case, the Byway. PDF files of the online survey were provided for printing and completion by visitors. QR codes were used for visitors who preferred to take the survey on their mobile devices.

In total, 279 surveys were completed. Highlights of the findings are included in the next section. For more information on survey questions and responses, see Attachment A.

FINDINGS

Of the 279 surveys completed, 57% of respondents identified as white and 28% Black or African American. 7% preferred not to say. Ages of visitors predominantly ranged from 60-69 (30%) and 50-59 (22%). 16% were 40-49 and 9% were 30-39; 5% were less than 29 years of age. Additional findings include:

Visitors from outside
Maryland: 58%

Average length of
stay: 1.6 days

Average spending per
person per day: \$92

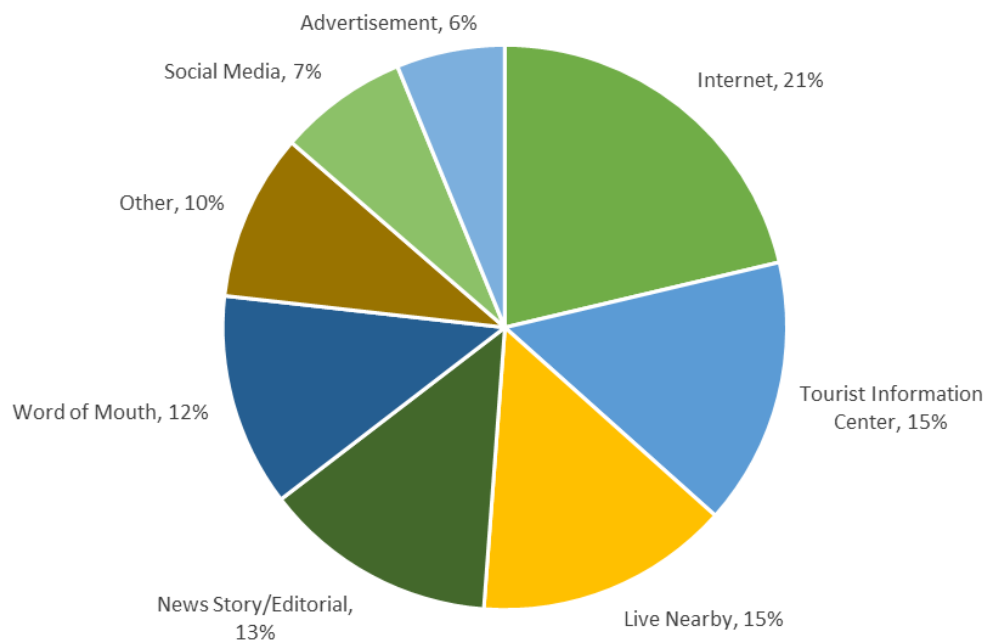
The average size of the visiting party was 3 people, while the median size of the visiting party was 2. The average length of stay was 1.6 days. The majority of respondents were visiting for the historical significance of the area (74%) and most (72%) gave the highest ranking when asked how important the Byway was in their decision to come to the area.

Most visitors are from outside the area. 100% of respondents were from outside Caroline County, and 90% were from outside Dorchester County. 58% were from outside Maryland. There was just one respondent from abroad, originating from the United Kingdom.

83% of respondents traveled on their own to the area, while 8% participated in a guided tour and 5% did a combination of the two. This aligns with the timeframe they visited and the pandemic situation during that time (50% of respondents visited in 2020).

People heard about the Byway from several sources, indicating a wide breadth of tactics are bringing people to the Byway. The internet was the most popular choice, at 21%, followed by a tourist information center (15%), living nearby (15%), a news story or editorial (13%), and word of mouth (12%). Other responses (which totaled 10%) included attending the Byway on a previous visit, seeing signs or the mural from the highway, a speaker they had seen, and having friends or family in the area.

How did you hear about the Byway?



While most respondents visited one of the major draws to the area - 28% to the HTUR State Park and Visitor Center, 20% to the Harriet Tubman Museum and Education Center, 19% to the Blackwater National Wildlife Refuge, and 15% to the Dorchester County Visitor Center – many people did not visit other locations along the Byway. 80 respondents (33% of those that answered this question) did not visit any other location.

Of these 80 respondents, their length of stay was slightly shorter (1.5 days vs 1.6 days) which may account for not visiting more sites. In addition, of these respondents, 40% visited the HTUR State Park and Visitor Center (compared to 28% of all respondents). It is possible that these visitors spent more time here versus touring the Byway's other offerings.

In addition to visiting the Byway, 27% of respondents dined in the area, 21% visited other historic sites, 10% shopped, 10% hiked, and 10% traveled to the shores and beaches. On average, people spent \$92 per person per day. See the impact analysis for a breakdown of spending by category.

WHAT WAS ESPECIALLY MEMORABLE?

In response to the question, “What did you find most enjoyable and memorable about your visit?” respondents focused on the educational opportunities and historical significance of the area. They specifically cited the audio accompaniment for self-guided driving tours and informational docents and interpreters at sites who could speak to the history of the area.

The historical significance and walking in the same path as Harriet Tubman made the experience specifically meaningful and palpable. Additionally, the scenery was noted by many. Visitors appreciated the unchanged preserved landscape and opportunities for birdwatching and interacting with nature. Several respondents were drawn to the art, including sculptures and murals, as well.

DIRECT FROM RESPONDENTS

I visited with my grandchildren. I really appreciate the way this very human story is told. There were so many highlights - Visitor Center, Bucktown Store, Stewart Canal, the mural in Cambridge. We used the audio guide. I wish we had had more time, but we will be back.

Great biking!

Everything was amazing!! We loved learning about Harriet Tubman.

I had known about Harriet Tubman and the Underground Railroad for many years, but this made it very real to me. We took a driving tour and seeing the very places she lived, with the relatively unchanged landscape, was very moving to me.

Reading, listening and hearing the various stories. The video in the theater was excellent!

As birders, we routinely travel throughout the Byway region, and are familiar with many of the sites. Visiting the Visitor Center was an excellent experience that tied all the sites together and details how each is important to the Black American experience and history.

We spotted five bald eagles while visiting the Blackwater Refuge and had a peaceful hike through the woods.

Walking in the same footpath!

The audio tour made a nice addition to the drive, and I enjoyed both the ones that were meant to be listened to at a location to explain it, as well as the ones with related stories for driving between locations.

IMPACT ANALYSIS

For this component, total usage, new visitation, new spending, and economic impacts (jobs, earnings, and sales) were calculated. The impact analysis also contains a literature review of previous impact studies on other byways for context into other methodologies.

LITERATURE REVIEW

The importance of scenic byways throughout the country is undeniable. To understand specific impacts and methodological approaches, a literature review was conducted to understand the economic impacts of other scenic byways from across the country. While these descriptions below outline the respective economic impact, the Steering Committee can turn to these byways as case studies to evaluate new approaches in marketing the byway. These are summarized below, and a full synopsis of the studies can be found in Attachment B.

Journey Through Hallowed Ground (VA, PA, MD, WV) | At 180 miles long, the Journey Through Hallowed Ground (JTHG) National Heritage Area (NHA) covers four states. The JTHG NHA boasts many historical sites, including a myriad of national parks and battlefields, as well as nine presidential homes. Overall, the report estimates that the JTHG NHA produces over \$700 million in annual economic activity. Most of the economic impact is driven by tourism, especially overnight visitors who support local businesses in the lodging/accommodations, restaurant, and retail sectors through their spending.

Erie Canalway National Heritage Corridor (NY) | The Erie Canal National Heritage Corridor (ECNHC) stretches more than 500 miles across upstate New York, reaching hundreds of communities and millions of New York residents. In aggregate, the report finds that the ECNHC produces over \$300 million in annual economic activity. The vast majority of the economic impact is driven by overnight tourism and non-local tourists' day trips used to explore the region. The economic multiplier effect from the visitation pays dividends to local economies and businesses, particularly those in the lodging/accommodations, restaurant, and retail sectors.

Schuylkill River National Heritage Area (PA) | The Schuylkill River NHC stretches over five Pennsylvania counties and has served as not only a catalyst for tourism and historical preservation but has also promoted environmental stewardship and conservation. Overall, the report estimates that the Schuylkill River NHC reaps nearly \$590 million in economic activity for the region annually. The majority of it is from non-local tourists patronizing the NHC's amenities, generating positive economic reverberations throughout the local economies, helping to bolster firms, particularly in the lodging/accommodations, restaurant, and retail sectors.

Lake Country Scenic Byway (MN) | Approximately 70% of residents in the area knew of the byway, as well as almost half of the travelers. The study reported that due to 51,000 byway visitors spending nearly \$30 million in the area in 2010, positive economic ripple effects reverberated out throughout the region, helping the area to realize nearly \$32 million in economic output, over 500 jobs, and about \$11 million in increased labor income.

Beartooth Highway (MT, WY) | the Beartooth Highway, an "All-American Highway" running nearly seventy miles through Montana and Wyoming. It also analyzes a visitors' assessment and recreational use of the Beartooth Highway and its adjacent amenities. Over the study period, the researchers estimated that the total economic impact from Beartooth Highway was \$53 million, mainly driven through non-local visitor spending that had a positive fiscal ripple effect across the regional economy.

Scenic Byway 12 (UT) | Through multiple survey analyses, the authors of the report estimate that the aggregate economic impact per year of the byway is approximately \$13 million due to an over 60,000 increase in the number of visitor trips taken on Scenic Byway 12, with each visitor group spending about \$900 during their trips. While total visitation along the byway was about 25% higher in 2012 than in 2001, average visitation levels fell by five percent when comparing average visitor counts from 1991 through 2001 to average visitor counts from 2002 to 2012.

Scenic Sumter Heritage Byway, FL | Public survey results in the analysis indicate that the primary reason visitors patronize the byway is to attend a community event, as well as to sightsee or explore the local history of the region. The report also demonstrates the positive economic benefits that the byway yields for the area: not only do visitors spend an average of \$135 to \$170 per trip (per respondents' survey answers), but this and other spending associated with the byway have ripple effects in the economy via the economic multipliers, resulting in 45 jobs created, over a \$2 million increase in Gross Regional Product, over \$3.5 million in business revenues, \$243,000 in local/state government tax receipts and \$350,000 in federal tax revenues (these include direct and indirect/induced effects).



Photo source: <https://www.facebook.com/HarrietTubmanByway/photos>

IMPACT METHODOLOGY & PROCESS

STUDY AREA

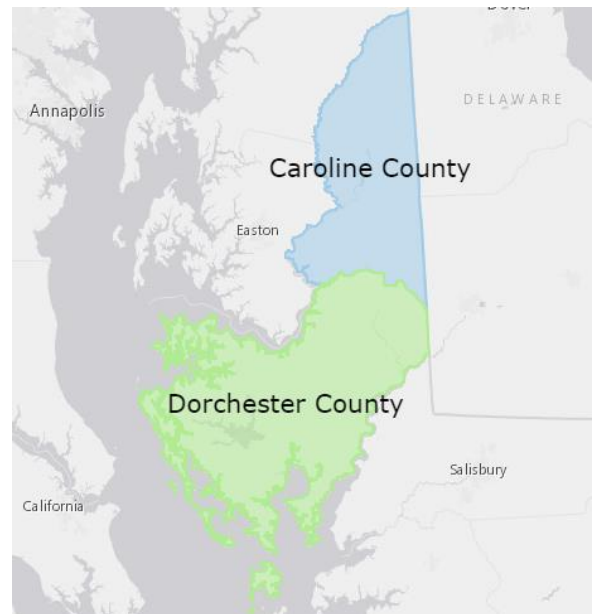
The 125-mile Byway traverses through Dorchester and Caroline Counties, Maryland before crossing through Delaware and ending in Philadelphia. This analysis calculates the aggregate economic impact of the Byway on Caroline and Dorchester counties and the fiscal benefit of the Byway to each of the two counties.

MODELING PROCESS

Economic Modeling Specialists, Intl. (Emsi) was used to calculate the economic impacts of the Byway. The following briefly describes the methodology, particularly as it relates to visitor spending; additional information about the Emsi model can be found in Attachment A.

1. **Estimate Net New Visitation:** Information about the HTUR State Park and Visitor Center visitation combined with information gathered from the survey was used to estimate the number of “net new” visitors. Survey data was used to identify visitors for which the Byway was their primary reason for visiting the region and who traveled to the region from outside of Caroline and Dorchester counties. “Net new” means visitation and spending that would not occur but for the byway.
2. **Estimate Net New Spending:** Using the survey results and a review of previous research, average spending per trip per net new visitor was estimated.
3. **Model Economic Impacts:** Using net new visitor spending amounts as inputs, the economic impacts- in terms of jobs, earnings, and sales of the Byway on the region (Caroline and Dorchester Counties) were estimated. Economic multipliers were provided through the Emsi software package.
4. **Calculate Total Impacts:** The total economic impacts as the sum of the direct, indirect, and induced impacts were calculated. The annual impacts that result from visitor spending were combined with those resulting from new on-site activity to calculate the total annual impact.

Figure 1



Modeling Software

Economic Modeling Specialists, Intl. (Emsi) designed the input-output model used in this analysis. The Emsi model allows the analyst to input the amount of new direct economic activity (spending, earnings, or jobs) occurring within the region and uses the direct inputs to estimate the spillover effects that the net new spending, earnings, or jobs have as these new dollars circulate throughout the economy. This is captured in the indirect and induced impacts and is commonly referred to as the “multiplier effect.” See Appendix A for more information on economic impact analysis.

What does “Net New” Mean?

When looking at the economic impacts of a project, it’s important to look only at the economic changes that would not happen in the Byway’s absence. These effects are the “net new” effect: purchases made only as a result of the project in question.

Definition of a “Job”

A “job” is equal to one person employed for some amount of time (part-time, full-time, or temporary) during the study period.

ECONOMIC IMPACT

Users of the Byway have an impact on the region in a number of ways, including:

- ◆ Non-residents traveling to Dorchester and Caroline counties to use the Byway and spend money in the counties (see Economic Impact section of the report for more information);
- ◆ Residents spending money in the counties because of access to the Byway, such money that would otherwise go out of the counties (see Economic Activity section of the report for more information);
- ◆ The value of the Byway to residents of the counties (see Direct Use Benefit section of the report for more information); and
- ◆ The fiscal impact of the Byway on the tax revenue generated (see Fiscal Impact section of the report for more information).

VISITATION ESTIMATES

According to Maryland Park Service, an average of 82,767 people visit the HTUR State Park and Visitor Center, annually.⁴ From a list of popular locations along the Byway, 28% of survey respondents indicated that they stopped at the visitor center and therefore, it was assumed that the 82,767 visitor center visitors are 28% of total Byway visitors. This means that there are an estimated 295,596 visitors to the Byway, annually.

To evaluate the impact of the Byway on Dorchester and Caroline counties, survey respondents were asked about the purpose of their trip to determine the portion of visitors coming to the region because of the Byway. They were also asked about their primary residence to determine the proportion of Byway visitors who live outside of the region and came to Dorchester and Caroline counties because of the Byway. Spending by these users is considered “net new” to the region because, if not for the Byway, this spending would not have occurred.

Based on the survey, 89% of Byway visitors are there because of the Byway (i.e. excludes visitors who were in the area for business or on the way to another destination). Of these visitors, 96% are from outside of the counties.⁵ This means that there are 251,155 net new visitors attributed to the Byway, annually.

Table 1

Net New Visitors	
Total Annual Visitors	295,596
Byway as Primary Purpose (89%)	261,620
% Out of Region	96%
Net New Visitors	251,155

Source: Survey, Camoin 310

⁴ Average annual visitation for 2017-2019 according to the Harriet Tubman Underground Railroad State Park and Visitor Center. 2020 was excluded given COVID-19's impact on travel.

⁵ When looking at total visitors, i.e. not just the visitors whose primary purpose of visiting is the Byway, 90% of visitors are from outside of Dorchester County and 100% are from outside of Caroline County.

Further analysis of the survey results revealed that the average trip length of all Byway visitors is 1.6 days. The average party size used in this analysis is three people.⁶

VISITOR SPENDING IMPACTS

Byway visitors will impact the regional economy as they make purchases on lodging, transportation, food and beverage, retail, and other recreation. The estimated average spending per party per trip and total visitor spending was derived from the information collected through the survey.

According to the survey, visitors spent an average of \$275 per party per trip. Since the average party size of Byway visitors is three people, this means that per-person spending is \$92 per person per trip, on average.⁷ This was multiplied by the 251,155 net new visitors to calculate total visitor spending of over \$23.0 million.

Table 2
Average Visitor Spending

Category	Spending per Party per Trip	Spending per Person per Trip (3 people per trip)	Total Visitor Spending (251,155 visitors)
Transportation	\$33	\$11	\$2,762,705
Food and Drink (restaurants)	\$68	\$23	\$5,692,847
Food and Drink (grocery/convenience stores)	\$19	\$6	\$1,569,719
Lodging	\$104	\$35	\$8,706,708
Retail	\$25	\$8	\$2,092,959
Recreation	\$12	\$4	\$1,004,620
Other	\$14	\$5	\$1,172,057
Total	\$275	\$92	\$23,001,615

Source: Survey, Camoin 310

The approximately \$23.0 million in visitor-related sales was used as the direct input into the Emsi model to estimate the total impact on jobs, earnings, and sales. Table 3 shows the total economic impact of visitor spending on the regional economy. This represents the annual economic impact the region would lose without the visitors to the Byway.

Table 3
Annual Economic Impact

	Jobs	Earnings	Sales
Direct	299	\$7,180,816	\$23,001,616
Indirect	34	\$1,225,664	\$3,498,766
Induced	30	\$1,450,754	\$3,570,254
Total	363	\$9,857,235	\$30,070,636

Source: Emsi, Camoin 310

⁶ The average party size for respondents who answered survey questions related to trip spending was 3.2 people per party. This was rounded to 3.0 as the majority of respondents had 3 or less people in their party. The average party size is higher than 3.0 due to larger tour groups pulling the average up. Taking this into account, 3.0 is a reasonable assumption of party size.

⁷ Based on our review of existing literature, the spend data generated through the survey is similar to average recreation spending amounts.

FISCAL IMPACT

In addition to the economic impact on the regional economy, the net new users of the Byway also have an annual fiscal impact in terms of hotel rental tax and property tax revenue.

HOTEL RENTAL TAX REVENUE

Both Caroline and Dorchester counties impose a 5% hotel rental tax on accommodations spending. According to data from Emsi, 99% of regional hotel sales occur in Dorchester County and 1% occurs in Caroline County. These percentages were applied to the over \$8.7 million of total direct spending on lodging in the region (as outlined in the *Economic Impact* section) to estimate the amount of spending occurring in each county.

Table 4

Annual Visitor Spending on Lodging	
Total Spending	\$8,706,708
Caroline County (1%)	\$106,087
Dorchester County (99%)	\$8,600,621

Source: Camoin 310, Emsi

The 5% tax rates are applied to these spending amounts to calculate the hotel rental tax revenue attributed to Byway visitor spending. Table 5 displays the hotel rental tax revenue for both Caroline and Dorchester Counties.

Table 5

Annual Hotel Rental Tax Revenue		
	<u>Caroline County</u>	<u>Dorchester County</u>
Lodging Spending	\$106,087	\$8,600,621
Tax Rate	5%	5%
Hotel Rental Tax Revenue	\$5,304	\$430,031

Source: Caroline County, Dorchester County, Camoin 310

PROPERTY TAX REVENUE

Although the Byway does not directly generate property tax revenue for the counties, property tax revenue can be thought of as a function of the economic activity within a region. As economic activity increases so do assessed property values, and therefore, property tax revenue.

To estimate the portion of property tax revenue that can be attributed to the Byway, the ratio of total "value added" sales⁸ associated with the Byway to the total Gross Regional Product (GRP)⁹ of Caroline County and Dorchester County was calculated. This ratio is used as a proxy for the portion of property tax revenue that can be attributed to the Byway.

⁸ Value added sales are a measure of contribution to GRP. This is the difference between an industry's total sales and the cost of its intermediate inputs. Intermediate inputs are goods and services that are used in the production process of other goods and services.

⁹ Gross Regional Product (GRP) measures the market value of all final goods and services produced in each county in a year.

The \$30.1 million in total sales that were calculated as part of the *Annual Economic Impact* (Table 3) is used to calculate revenue from property tax. According to data from Emsi, 34% of regional sales in industries in the visitor spending basket occur in Caroline County while 66% occur in Dorchester County attributing \$10.1 million to Caroline County and \$20.0 million to Dorchester county.

Of these total sales, the portion that is considered to be value added equals over \$5.5 million in Caroline County and nearly \$11.1 million in Dorchester County.¹⁰ Value added sales in Caroline County account for 0.4% of the county's GRP while value added sales in Dorchester County account for 0.8% of the county's GRP. This is, in effect, the portion of each county's property tax base that is reliant on economic activity generated by the Byway. Applying this ratio to the property tax levies of the counties, the total property tax revenue attributed to the Byway was estimated to be \$109,718 in Caroline County and \$251,545 in Dorchester County. These amounts are composed of taxes paid by businesses and residents in the counties and represent the amount that total property tax revenue of the counties would decrease if the Byway did not exist.

Table 6

Property Tax Revenue		
	Caroline County	Dorchester County
Total Sales (from <i>Economic Impact</i>)	\$30,070,636	
Pct. Of Total Sales in Geography	34%	66%
Total Sales in Geography	\$10,076,681	\$19,993,955
Value Added Portion of Total Sales	\$5,519,277	\$11,050,099
2020 Gross Regional Product	\$1,242,353,377	\$1,345,853,809
Pct. Of GRP Attributable to Byway	0.4%	0.8%
FY20 Property Tax Levy	\$24,696,738	\$30,637,137
Property Tax Revenue Attributable to Byway	\$109,718	\$251,545

Source: Emsi, Camoin 310

TOTAL TAX REVENUE

The total annual tax revenue attributable to the Byway is displayed in **Error! Reference source not found.**

Table 7

Total Tax Revenue		
	Caroline County	Dorchester County
Hotel Rental Tax Revenue	\$5,304	\$430,031
Property Tax Revenue	\$109,718	\$251,545
Total	\$115,022	\$681,577

Source: Caroline County, Dorchester County, Camoin 310

¹⁰ Source: Emsi

ECONOMIC ACTIVITY

Previous sections of this report focus on the economic and fiscal impacts of the Byway on Caroline and Dorchester counties whereas the following is the economic activity associated with the Byway and considers the spending of all users of the Byway, not simply those that are net new. "Economic activity" is a compilation of the general economic activity around, in this case, Byway use. It reports all the people using the Byway and what they might be spending. It is a good way to simply summarize what is happening whereas the economic impact analysis focuses only on "new" spending that, but for the Byway, would not occur in the counties. Economic impact analyses are considered a more rigorous look not just at what is happening, but what is changing economically in the state. While not as rigorous as the economic impact study, the economic activity is a good measure of the size of the Byway activity relative to the region's economy.

Using the average spending per person per trip and the number of visitors who were not net new visitors, plus the direct economic impact of the net new Byway visitors estimated in the *Economic Impact* section, it is estimated that the Byway accounts for nearly \$27.1 million in economic activity annually. Of this, roughly \$23.0 million is considered "net new" to the region.

Table 8

Annual Economic Activity	
Net New Economic Impact	
Net New Economic Impact	\$23,001,616
Non Net New Economic Impact	
Avg. Spending Per Person Per Trip	\$92
Non Net New Visitors	44,441
Economic Activity	\$4,070,091
Total Economic Activity	\$27,071,707

Source: Camoin 310, Survey

COMMUNITY & QUALITY OF LIFE ANALYSIS

Heritage sites, parks, and recreation have been associated with improving quality of life through increased property values, increased economic opportunities, and benefits to civic engagement. To better understand the HTUR Byway's impact on quality of life in the area, a review of literature was conducted on the impacts of heritage and culturally significant areas. Stakeholder interviews and a direct use benefit analysis were also conducted to quantify these impacts.

COMMUNITY BENEFITS

The HTUR Byway provides immense benefits that are more difficult or impossible to quantify. The State of Maryland recognizes the benefits of Byways across the state as outlined in the *2012 Maryland Scenic Byways Strategic Plan*. These include:

- ◆ Facilitate the Development of Community and Regional Partnerships
- ◆ Identify Ways to Protect and Preserve Intrinsic Qualities
- ◆ Initiate an Open Dialog with the Maryland State Highway Administration
- ◆ Increase Competitive Edge for New Funding Sources
- ◆ Increase Recognition
- ◆ Increase Property Values
- ◆ Enhance Property Values and Positive Fiscal Impact¹¹

The following section outlines how the cultural and environmental assets of the area improve the quality of life for those that live and work in the area.

CULTURAL AND HISTORICAL BENEFITS

There are 27 listings of places on the Historic Registry in Dorchester County and 23 listings in Caroline County. There are three historic districts in Dorchester County, the Cambridge Historic District Wards I and III, the East New Market Historic District, and the Pine Street Neighborhood District. In addition, much of Dorchester County is included in the Heart of Chesapeake Country Heritage Area. Caroline County has three historic districts as well, the Denton Historic District, the Federalsburg West Historic District, and the Willison Mill Historic District. Much of Caroline County is included in the Stories of the Chesapeake Heritage Area.

Given the vast cultural and historical significance throughout the area, it is clear these could have an impact on enhancing the area's quality of life. But how? Historical areas tend to attract new residents, those in the knowledge and creative economies, and have a high proportion of arts and entertainment jobs. Historic districts have a greater share of population growth and the location of small, new, and creative jobs are located more often in older regions of an area. In addition, they are more diverse - by race, ethnicity, and income.¹² In one Texas

¹¹ Maryland Scenic Byways Strategic Plan, 2012

¹² https://www.placeeconomics.com/wp-content/uploads/2018/03/Rhode-Island-Report_3.2.18-pages-smaller.pdf

community, 10 of 13 historic districts saw lower foreclosure rates during the housing crisis between 2008 and 2012 than the city-wide average.¹³

Driving for pleasure has steadily increased in among the US population from the 1980s onward, with close to half of the population participating. The intrinsic qualities that these people are looking for are scenic, natural, recreational, historic, cultural, and archeological in nature. Byways increase the quality of recreation activities, preserve natural areas and cultural and historical sites, and conserve community beauty for those that live in the area.¹⁴

Areas with historical significance create more jobs (in building rehabilitation versus new construction), have more job growth, have the highest ratings for restaurants, and have higher increases in property values over time when compared to the surrounding areas. Findings in the US and abroad indicate that tourists visiting for historical or heritage reasons stay longer and spend more per day when compared to tourists visiting for other reasons.¹⁵

Additionally, these areas are more resistant to economic downturns and do better in times of economic growth indicating resiliency in the real estate market. They provide areas for small businesses to thrive with attractive smaller spaces and contribute to the commercial vitality of the neighborhood. Often, these areas house more small business jobs compared to the larger area.¹⁶

With the COVID-19 pandemic illustrating that people can work from home, quality of life is becoming a more critical criterion for deciding where to live versus distance to an employment hub. This is especially true for Millennials (born between 1980-2000) who continue to enter the housing market. With its base of tourist amenities, proximity to Washington DC, and beautiful scenery, the area along the Byway in Dorchester and Caroline Counties is positioned well to accommodate new residents.

ENVIRONMENTAL BENEFITS

In addition to visiting the sites along the Byway, visitors and residents participate in a number of other activities to enjoy the surroundings including hiking, bicycling, paddling, boating or sailing, wildlife photography, birdwatching, and walking.

Much of the land surrounding the Byway sites have environmental significance, as the area is connected to the largest estuary in the United States, the Chesapeake Bay, and the many industries historically dependent on these water resources. Dorchester and Caroline County's waterways make it a boating destination. This connection to natural resources, such as tidal marshes and wetlands, is part of the area's character and has been recognized as an integral component to both the social and environmental fabric of the community.¹⁷

The environmental significance of the area does yield measurable impacts to the community and is supported by sites like the Blackwater National Wildlife Refuge with its access to education and programs and displays about the plants, animals, and communities of the region and live animal exhibits and self-guided nature trails. Nature education is a critical part of helping children become environmental stewards and keeping them grounded in a

¹³ <https://www.placeeconomics.com/wp-content/uploads/2020/01/City-Studies-WP-Online-Doc.pdf>

¹⁴ https://www.scenic.org/wp-content/uploads/2019/09/Rob_Draper.pdf

¹⁵ <https://www.placeeconomics.com/wp-content/uploads/2020/01/City-Studies-WP-Online-Doc.pdf>

¹⁶ Ibid.

¹⁷ <http://www.dorchestercountymd.com/wp-content/uploads/2018/03/Dorchester-County-LPPRP-2017-2.15.pdf>

digital age. Research has also shown that spending time outdoors can also mitigate the symptoms of Attention Deficit Hyperactivity Disorder.¹⁸

Outdoor recreation also provides significant health benefits including lower blood pressure, reduced arthritis pain, weight loss, and lowered risk of diabetes and cardiovascular disease. By providing free and accessible opportunities for outdoor recreation, the Byway offers an alternative to expensive private fitness memberships and the opportunity to exercise while enjoying the natural landscape. Studies have shown that living in a green environment is positively related to the amount of physical activity, indicating that having access to natural areas for recreation encourages people to be active.¹⁹ Being in nature also reduces stress, which then reduces stress-related health issues including high blood pressure and heart attacks.

The natural areas along the Byway perform important environmental functions including air pollution removal and habitat for wildlife species. The wetlands and water bodies also provide valuable functions through stormwater management. Wetlands absorb stormwater like a sponge compared to impervious surface areas like roads and buildings where water cannot filter into the ground and expensive infrastructure is needed to store and direct the flow of water. Wetlands and water bodies also act as natural filtration systems for water helping to provide clean and safe water for the people and wildlife.

The natural areas along the Byway provide services such as helping to improve water quality, air quality, water supply, flood protection, and carbon sequestration. Based on a report from The Conservation Fund, these “ecosystem services” of wetlands have an estimated annual value of \$9,000 per year for storing reserves and \$8,000 per year annually for absorbing stormwater. Coastal wetlands can also reduce hurricane damage in the United States by over \$3,800 per acre per year.²⁰

The immeasurable benefits of the Byway of quality of life enhancement, recreational opportunities, health benefits, air pollution removal, stormwater control, and biodiversity highlight the importance and value of the lands and waters of the Byway region.

INTERVIEW FINDINGS

Interviews were conducted with organizations and businesses that are in proximity to the Byway. For a list of people and organizations interviewed, please see Attachment D. The following are the themes uncovered during this interview process.

The history of Harriet Tubman is one of the most important drivers of the tourism economy. | It is clear from the discussions with area businesses and organizations that Harriet Tubman’s presence in the area over 150 years ago is one of the major draws to the area today. The opening of the Visitor Center at the HTUR State Park in 2017 and the mural in downtown Cambridge completed in 2019 were both touted as major draws. While some major hubs draw visitors, the pull is less on one destination and the more the area as a whole. Though interviewees do not record the specific reasons why people are staying in the area, one hotel did inform us that about 60% of guests were in the area for leisure purposes. Specific tourism packages organized by some accommodation businesses have not been successful, but some have developed suggested itineraries that have worked well for guests. And while the area is popular for school and other larger bus tours, many people come

¹⁸ Godbey, Geoffrey. “Outdoor Recreation, Health, and Wellness.” (2009)

¹⁹ Ibid.

²⁰ http://www.conservationfund.org/images/projects/files/Houston_Galveston_Report.pdf

just for the day in their vehicle with family. It is clear the historical significance is important to the area, and the degree to which it impacts local businesses is directly related to how close a business is to a major site along the Byway.

The impacts of COVID are enabling innovative solutions. | It was hard to complete these interviews without discussing the most prominent economic impact on the world in recent times – the COVID-19 pandemic. During the time of the interviews, most businesses and organizations had seen the worst of the impacts of the pandemic. Most closed from nine to twelve weeks and were just beginning to reopen in some capacity. Some businesses were dependent on the vaccine rollout and were either planning to shut down for the year or seriously pivot to new types of operations. While it did seriously impact many businesses, many were responding creatively to the pandemic's unique challenges. Because the Harriet Tubman Museum was closed, one business owner acted in a tour-guide capacity communicating what was open at that moment. Another planned to shift bus tours to self-driving tours where an interpreter would be available onsite and in a socially distant capacity. Another took advantage of their land and opened it up for RV campsites. It was also acknowledged that once the vaccine is widely available, the area will see pent-up demand for travel being released in the area.

The spiritual and emotional impact of the area's history is significant to Black and African American visitors. | In addition to its historical significance, business owners repeatedly shared visitor feedback relating to the spiritual and emotional impact of the region. One business owner shared that many people come to the mural in downtown Cambridge, place their hand on Harriet Tubman's outstretched palm, get their photo taken, and go through a sort of healing process. This is specifically the case for Black and African American visitors, who often visit the area in church groups, on tour busses, or in motorcycle groups. Stories were shared about tour groups with diverse participants who moved toward a mutual understanding of their perspectives and the history of the Underground Railroad. There are rich stories that emerge from engaging in the Byway for these visitors, and this adds to the area's uniqueness.

There is potential for increasing the connection between the Harriet Tubman Visitor Center and downtown Cambridge. | Creating stronger connections between downtown Cambridge and the HTUR State Park and Visitor Center has the potential to increase visitor length of stay and visitor expenditures. Downtown Cambridge acts as an ideal gateway for the HTUR experience with its frequently visited murals, parks, museums, and courthouse. Additionally, downtown Cambridge serves as a vital commercial hub through its dining establishments and retail shops. Establishing a seasonal shuttle service between downtown and the the HTUR State Park and Visitor Center would increase Cambridge's role as the gateway while simultaneously attracting more visitors to the downtown area.

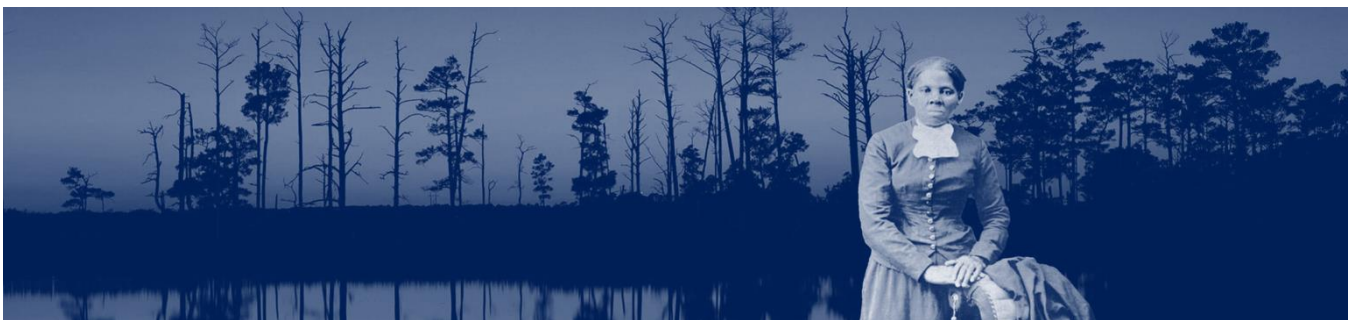


Photo source: <https://harriettubmanbyway.org/newhtbw/wp-content/uploads/2016/11/home-slide-1.jpg>

DIRECT USE BENEFIT

In addition to the visitors to Dorchester and Caroline Counties that are drawn by the HTUR Byway, residents of Dorchester and Caroline Counties also benefit immensely from the opportunities for education, recreation, and the general enjoyment and use of cultural sites. The use of Byway sites, lands, and facilities by residents has measurable economic value referred to as "direct use benefit."

The direct use benefit is not an actual measure of spending but rather measures how much residents of Dorchester and Caroline Counties value the Byway. Essentially, direct use is the value that a resident places on a particular activity that they do along with the Byway sites, even if that activity is free. Economists have determined that certain recreational and cultural activities are worth specific dollar amounts to participants in these activities. This dollar value represents what participants would have been willing to spend to participate in that activity if it was not available for free. In this way, the direct use value is essentially what residents are saving by being able to enjoy free activities along the HTUR Byway.

Based on the findings of the survey, approximately 44,441 Dorchester and Caroline County residents use the Byway on an annual basis. Using the US Army Corps of Engineers estimates that General Use recreation (including trails, picnicking, sitting, etc.) is worth \$4.21 per visit for a total of \$187,098 per year.

Table 9

Annual Direct Use Value		
Resident Users	Value per Visit	Total Value
44,441	\$4.21	\$187,098

Source: Survey, Camoin 310, US Corps of Engineers
FY 2020 Economic Guidance Memorandum 20-03



Photo source: <https://harriettubmanbyway.org/newhtbw/wp-content/uploads/2016/12/bestpitch.jpg>

MARKETING RECOMMENDATIONS

As seen in the results of the visitor survey, visitors hear about the Byway from many different sources. Because of new attractions and designations, increased media attention including television and movies depicting the life of Harriet Tubman, and other ongoing marketing efforts, there has been growth in the number of people visiting and patronizing the area. At the same time, the budget for major marketing initiatives is slim for Dorchester Tourism, and resources and staff capacity need to be used creatively. Three unique conditions are aligning those present positive opportunities for marketing and promotion of the Harriet Tubman Byway assets:

- ◆ Pent up tourism demand following the COVID-19 pandemic and the desire for safe, family-friendly, destinations.
- ◆ Increased national awareness and desire for education on the history of Black people in the United States.
- ◆ Harriet Tubman's 200th birthday in March of 2022.

With collaborative marketing, aligned messaging, and close partnerships, the Harriet Tubman Byway is well-positioned to see a growth in visitation and public awareness of these incredible assets that tell the story of Harriet Tubman's impact. However, this cannot happen at current staff capacity. Additional staff hours will be needed to fully optimize the potential benefits of the Byway.

The following section takes account of the current marketing efforts as well as provides strategies that strive to answer the question, "How can the HTUR Byway be promoted to enhance full use of the sites?"

EXISTING EFFORTS

The existing marketing efforts of the Byway are significant. They include a robust social media presence, an interactive website devoted to the Byway, audio tour and app, travel packages, partnerships with neighboring businesses (including producing a wine called "Freedom"), and more. Existing efforts at present are focused on the digital space and content development via news, blogs, and editorials.



Efforts like the "Freedom" wine produced by Layton's Chance Vineyard and the audio accompaniment app have helped to promote the Byway.

<https://www.myeasternshoremid.com/>

PRESS

Harriet Tubman's life efforts have been the subject of much media attention in recent years. While individual social media posts and blogs have been one source of this press, major media efforts like movies and TV series have illuminated her legacy and have boosted visitor numbers along the Byway. The infographic outlines the major ways her legacy has gained prominence in recent years: ^{21, 22, 23}

<p>2016</p> <p>HBO Movie is released: <i>Bound for the Promised Land: Harriet Tubman</i>.</p>	<p>2016-2017</p> <p>Tubman is featured in <i>Underground</i>, a WGN television drama about the Underground Railroad that ran for two seasons.</p>	<p>2019</p> <p>Focus Features biopic, <i>Harriet</i>, released late 2019.</p>
<p>2019</p> <p>A CBS Sunday Morning features locations along the byway including the Bucktown Village Store and Popular Neck in Caroline County.</p>	<p>2021</p> <p>Efforts are re-engaged for Harriet Tubman to replace Andrew Jackson on the twenty-dollar bill.</p>	<p>2021</p> <p>#walkwithharriet trends as eight women retrace Harriet Tubman's path, raising funds for the Harriet Tubman Museum and Educational Center.</p>

FUTURE FOCUS

As the pandemic has decimated the tourism and accommodations industry, it is best to take a "repair and renew" approach to marketing strategies, focusing on the short- to medium-term. Moving forward, marketing recommendations focus on how the Byway can be positioned to provide greater impact to both the economic vitality of the region and also provide a lasting and meaningful experience to those who visit.

These strategies are provided as a menu of ideas that can be acted upon as relevant funding, partners, staff capacity, and other opportunities become available. They are grouped into themes outlined below:

EVALUATE EXISTING EFFORTS

- ◆ Examine how the Byway and its sites are portrayed in Trip Advisor, Yelp, and Google results/reviews. Work to change these as necessary, and assist organizations, sites, and businesses along the Byway to improve their online presence on these (and their own) sites.
- ◆ Design a marketing metric dashboard that includes things like website views, social media hits, app downloads, etc. that is reviewed at regular intervals and can be used to adjust and adapt marketing efforts as needed.

²¹ <https://www.goupstate.com/articles/20170709/new-life-on-freedom-fighter-harriet-tubmans-maryland-trail>

²² <https://www.govexec.com/management/2021/01/harriet-tubman-20-bill-biden-administration-says-its-resuming-effort/171663/>

²³ <https://www.nbcwashington.com/news/local/harriet-would-want-us-to-women-walking-116-miles-in-tubmans-footsteps/2413904/>

- ◆ Review national listings of byways and important heritage sites and historical significance. Work to get the Byway at the top of these lists.
- ◆ Evaluate the use of social media. Use more video elements as these have proven successful (see the video of the Harriet Tubman statue being placed in front of the Courthouse). This could be a quick live event that provides a quick history lesson, staff talking about their favorite spot along the Byway, or videos of events. Additionally, create and link to an Instagram account, as this social media outlet has the most sway with influencers.
- ◆ Link and incorporate more Byway elements into Visit Dorchester Brand, Stories of the Chesapeake, and Caroline County especially as it relates to specific events along the Byway.
- ◆ Recognize customer service representatives within the hospitality industry are the front-line advocates of the Byway. Communicate regularly with them to ensure they can talk intelligently to the various sites, provide guidance to visitors, and make every interaction positive and informative for guests.
- ◆ Expand one-day events into weekend events that link attractions together.

What does the pursuit of freedom mean today?

Consider incorporating elements of justice and equity into the social feeds of the Byway to engage potential visitors. Encourage action and an emotional response, which creates a more meaningful and lasting impact. Embody the spirit of Harriet Tubman and work to address the lack of freedoms that still exist today for Black Americans.

INCREASE COLLABORATION

- ◆ Arrange free, closed-door tours for the business community to sites along the Byway and position them as local advocates. Include lunch and organize during low attendance times of the year for maximum business participation.
- ◆ Investigate linking the Byway with social influencers who can spread the word about the Byway in an organic way.
- ◆ Continue to align product development and marketing efforts with the Maryland Office of Tourism and Capital Region USA to increase the number of domestic and international visitors.

CELEBRATE STRENGTH

- ◆ Bring the Byway to the classroom. With an ever-increasing emphasis on Black history and willingness to connect virtually, reach out to school districts across the country to see what they might use as part of their curriculum during Black History Month and throughout the year. Illustrate the range of opportunities on-site and available remotely for all age groups with the ability to highlight the Byway and encourage visitation.
- ◆ Highlight the creativity of the Byway's sites and businesses as a topic of articles and social media posts in light of surviving the devastating impacts of COVID. Showcase how businesses creatively pivoted during the pandemic and illustrate how they are planning on coming back stronger than ever. Communicate what it was that helped them through, such as a resource in the community, access to financial help, or business community support.

- ◆ Establish a “light up the night” evening event that highlights the Underground Railroad with speakers, activities, and lights.
- ◆ Create a mural/art tour with temporary installations from Black artists along the Byway. Kick-off or conclude the event on the 200th birthday of Harriet Tubman.
- ◆ Highlight how a family can travel safely after a difficult year illustrating the ways businesses and sites have accommodated to create added safety at their location, such as Harvest host (for RV Camping) Layton’s Chance Winery.

CONTINUE TO CROSS MARKET

- ◆ Continue to cross market products in thoughtful and creative ways. The Harriet Tubman wine named “Freedom” is one example. Road races and triathlons that attract athletes from long distances are other examples. These events typically have pre-race expos where a booth about the Byway would create an opportunity to educate about opportunities before and after the race.
- ◆ Meet monthly with all tourism links along the Byway. Include Heritage Areas, downtown businesses, and all who depend on the tourism market. Discuss new happenings, what people are learning, what events are forthcoming, and opportunities to work together.
- ◆ Look at other byways, historic districts, and other cultural tourism sites that emphasize Black history and consider creating a consortium of destinations.
- ◆ Stage family activities in the area as a day trip or place to visit on the way to or home from other destinations.
- ◆ Consider bringing in speakers that draw a new audience to the Byway. Examples include artists, environmentalists, or cyclists to connect to the history of the Byway.

CONNECT TO DOWNTOWN

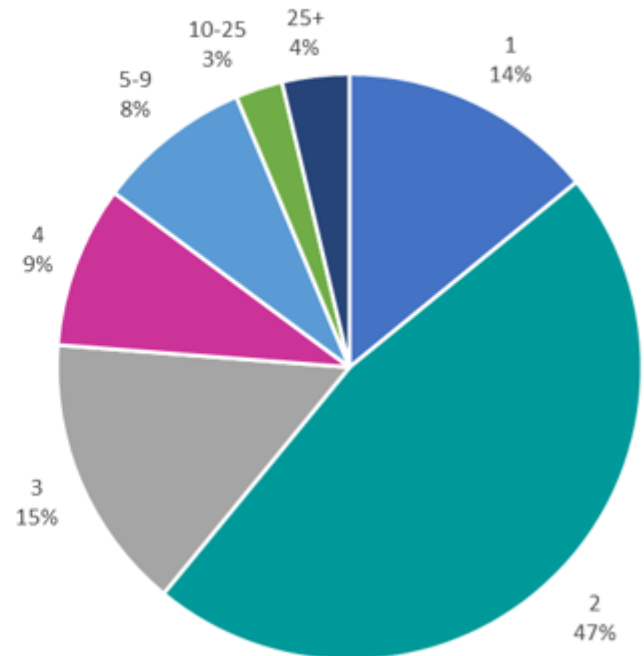
- ◆ Encourage group tours to schedule time to mingle downtown to shop and dine.
- ◆ Create additional wayfinding signage, especially to the mural in Downtown Cambridge.
- ◆ Consider a shuttle from Downtown Cambridge to the HTUR State Park and Visitor Center.
- ◆ Create a scavenger hunt or geocaching network to keep people around and exploring the community.

ATTACHMENT A: SURVEY RESULTS

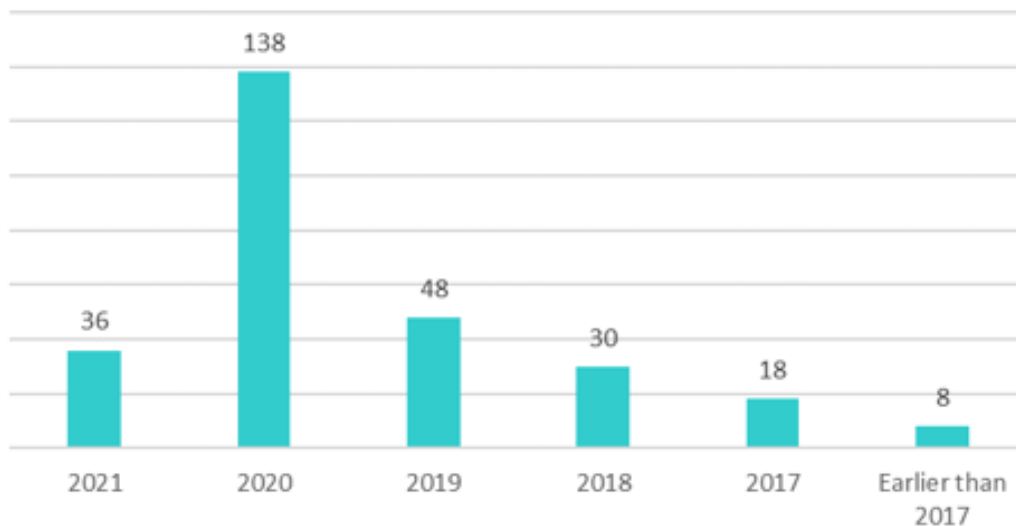
VISITOR OVERVIEW

Average Length of
Stay
1.6 Days

Number of People in Your Party



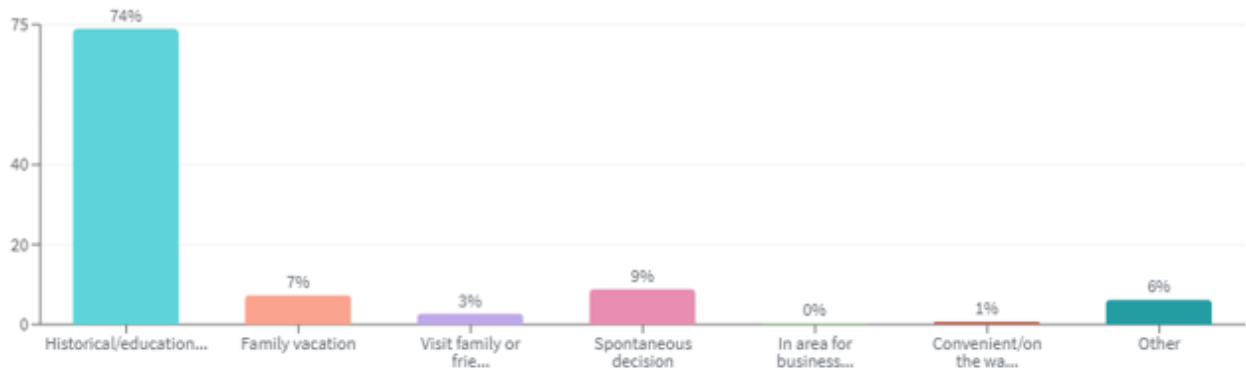
Last Visit by Year



REASON FOR VISITING

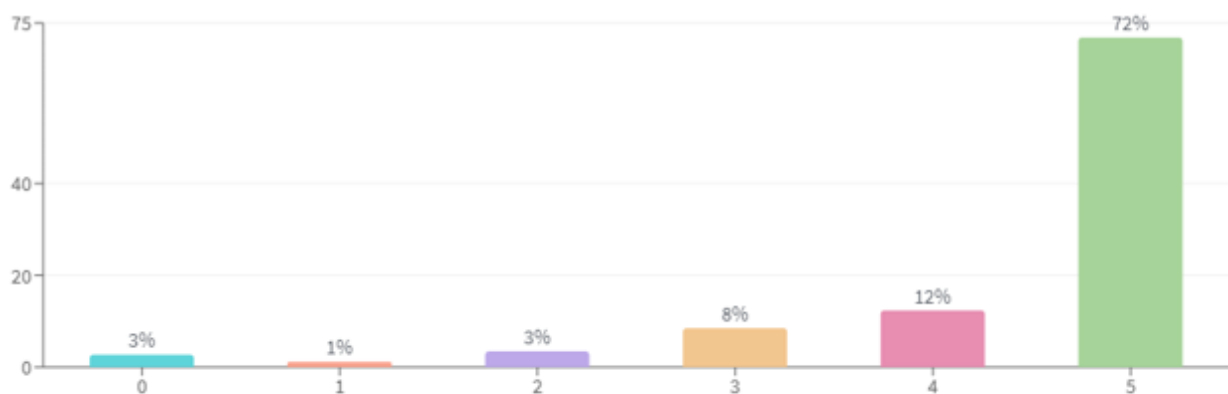
What was your primary reason for coming to this area? Choose one.

Answered: 261 Skipped: 0



On a scale of 1 to 5, with 1 meaning not important and 5 meaning very important, how important was the Harriet Tubman Underground Railroad Byway in your decision to travel this route?

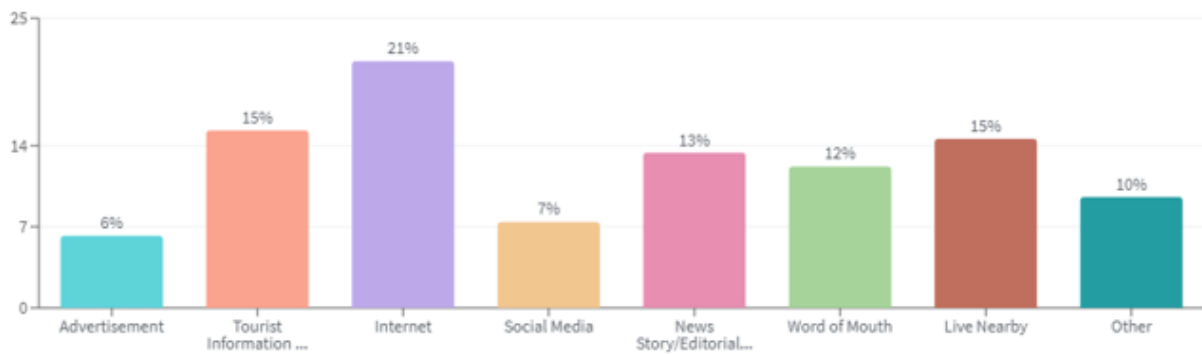
Answered: 259 Skipped: 0



VISIT OVERVIEW

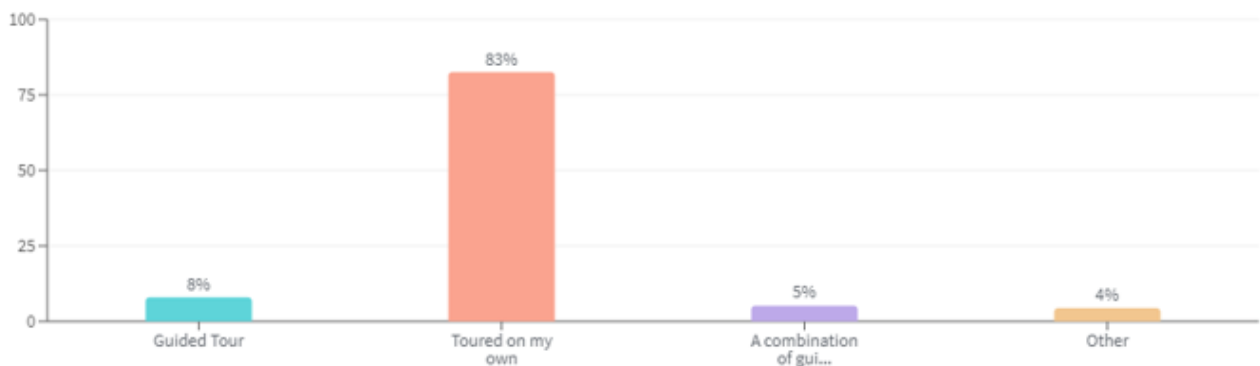
How did you hear about the Byway? Please check all that apply.

Answered: 254 Skipped: 0



Did you participate in a guided tour or did you tour on your own?

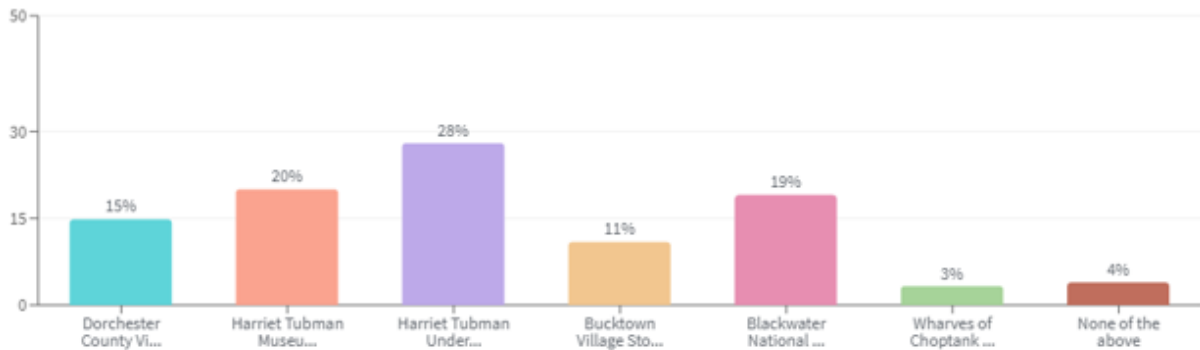
Answered: 252 Skipped: 0



LOCATIONS VISITED

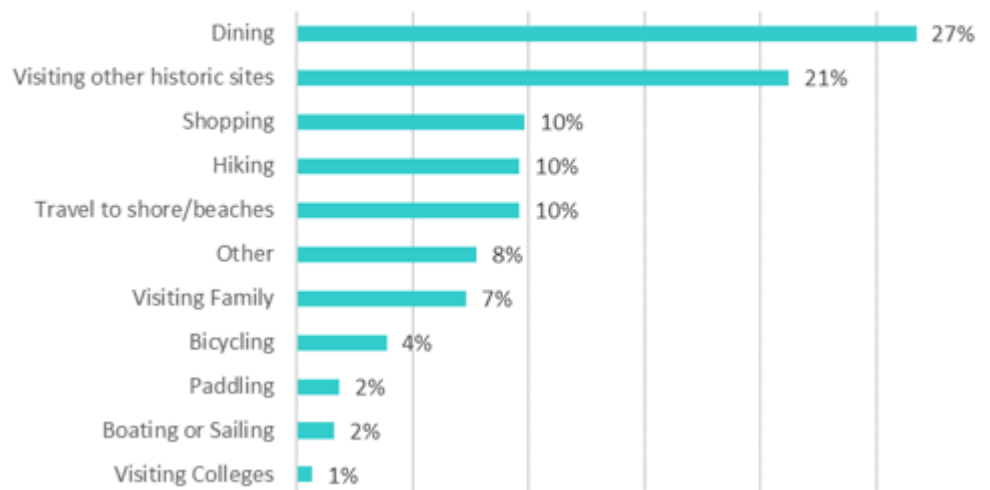
What information hubs did you visit while on the Tubman Byway? Check all that apply.

Answered: 249 Skipped: 0



ACTIVITIES

What other activities did you participate in while on the Byway or in the area?

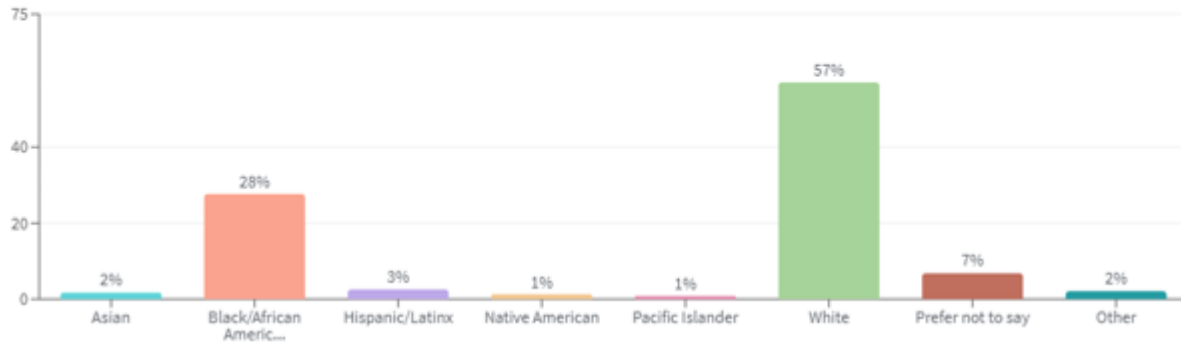


What other locations did you visit while on the Tubman Byway?**Check all that apply.**

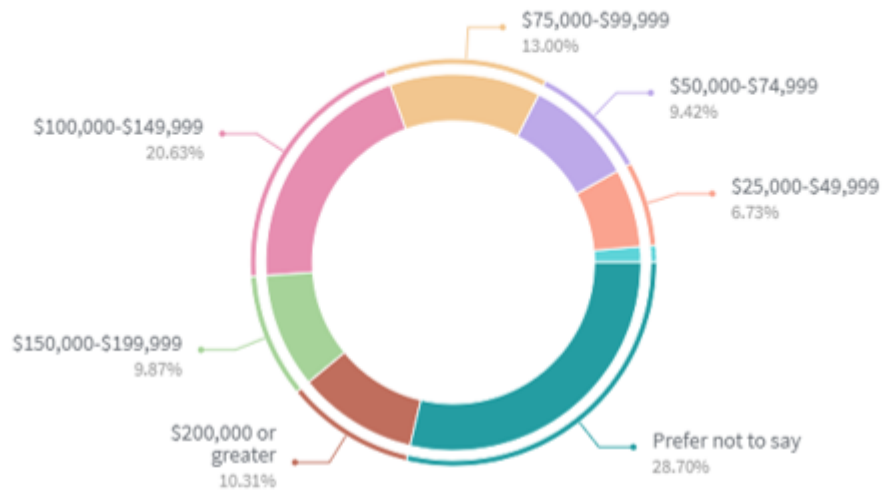
ANSWER CHOICES	#	%
None of the above	80	8.9%
Brodess Farm	69	7.7%
Long Wharf	68	7.6%
Stanley Institute	66	7.3%
Church Creek	64	7.1%
Dorchester County Courthouse	56	6.2%
Little Blackwater Bridge	52	5.8%
Malone's Church	36	4.0%
Joseph Stewart's Canal	27	3.0%
Webb Cabin	26	2.9%
Choptank Landing	25	2.8%
Bestpitch Ferry Bridge	25	2.8%
Madison, MD	25	2.8%
Linchester Mill	24	2.7%
Button's Creek	23	2.6%
Scott's Chapel	22	2.4%
New Revived United Methodist Church	18	2.0%
Pritchett Meredith Farm	17	1.9%
Other	16	1.8%
Adkins Arboretum	16	1.8%
Faith Community United Methodist Church	16	1.8%
William Still Interpretive Center	15	1.7%
Tuckahoe Neck Meeting House	14	1.6%
Denton Steamboat Wharf	14	1.6%
Mount Pleasant Methodist Episcopal Cemetery	14	1.6%
Jonestown, MD	13	1.4%
Greensboro, MD	11	1.2%
Gilpin Point	11	1.2%
Jacob & Hannah Leverton Home	11	1.2%
Caroline Courthouse	10	1.1%
Moses Viney Daniel Crouse Memorial Park	8	0.9%
Willow Grove	5	0.6%
Christian Park at Red Bridges	3	0.3%

ABOUT THE RESPONDENTS

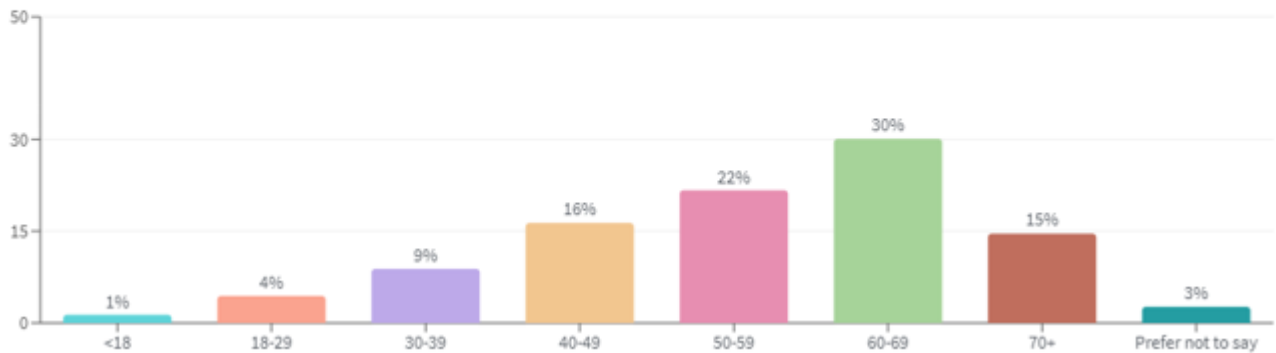
Race & Ethnicity



Income



Age



ATTACHMENT B: LITERATURE REVIEW

As part of our research process, Camoin 310 reviewed reports and articles on similar byways and cultural assets throughout the United States. This research provided us with an in-depth understanding of how and why these cultural assets impact the communities they are in, and the role they play in growing the tourism economy.

"THE ECONOMIC IMPACT OF NATIONAL HERITAGE AREAS: A CASE STUDY ANALYSIS OF THE JOURNEY THROUGH HALLOWED GROUND NHA"

Completed in 2015 for the Heritage Development Partnership, this report studies the total economic effects of the Journey Through Hallowed Ground (JTHG) National Heritage Area (NHA) over three years, from 2012 to 2014. At 180 miles long, the JTHG NHA covers four states and seeks to commemorate and preserve the area's rich cultural contributions. The JTHG NHA boasts many historical sites, including a myriad of national parks and battlefields, as well as nine presidential homes. Overall, the report estimates that the JTHG NHA produces over \$700 million in annual economic activity. Most of the economic impact is driven by tourism, especially overnight visitors who support local businesses in the lodging/accommodations, restaurant, and retail sectors through their spending. The analysis also estimates that the NHA added about 8,400 jobs (from direct and indirect/induced effects). The JTHG generates over \$50 million every year in gross tax revenue for the region.

"THE ECONOMIC IMPACT OF NATIONAL HERITAGE AREAS: A CASE STUDY ANALYSIS OF THE ERIE CANALWAY NATIONAL HERITAGE CORRIDOR"

Contracted by the Heritage Development Partnership, this economic impact analysis measures the total economic effects of the Erie Canal National Heritage Corridor (ECNHC) from 2012 to 2014. Designated as a National Heritage Corridor in 2000 by Congress, the ECNHC stretches more than 500 miles across upstate New York, reaching hundreds of communities and millions of New York residents. In aggregate, the report finds that the ECNHC produces over \$300 million in annual economic activity. The vast majority of the economic impact is driven by overnight tourism and non-local tourists' day trips used to explore the region. The economic multiplier effect from the visitation pays dividends to local economies and businesses, particularly those in the lodging/accommodations, restaurant, and retail sectors. Additionally, the case study estimates that the ECNHC generates nearly \$35 million in gross tax revenue per year, as well as supports over 3,000 jobs in the region (including from direct and indirect/induced effects).

"THE ECONOMIC IMPACT OF NATIONAL HERITAGE AREAS: A CASE STUDY ANALYSIS OF THE SCHUYLKILL RIVER NATIONAL HERITAGE AREA"

This economic impact analysis produced in 2015 measures the total effects of the Schuylkill River National Heritage Corridor (NHC) from 2012 to 2014. The Schuylkill River NHC stretches over five Pennsylvanian counties and has served as not only a catalyst for tourism and historical preservation but has also promoted environmental stewardship and conservation, as well as economic revitalization. Overall, the report estimates that the Schuylkill River NHC reaps nearly \$590 million in economic activity for the region annually. The majority of it is from non-local tourists patronizing the NHC's amenities, generating positive economic reverberations throughout the local economies, helping to bolster firms, particularly in the lodging/accommodations, restaurant, and retail sectors. The report also estimates that the Schuylkill River NHC produces over 6,000 jobs and nearly \$40 million in annual gross tax revenue.

"AMERICA'S BYWAYS RESOURCE CENTER *JOURNEY THROUGH HALLOWED GROUND*, ECONOMIC IMPACT TOOL: SENSITIVITY ANALYSIS"

America's Byways Resource Center retained HDR Decision Economics to conduct an appraisal of the Economic Impact Tool that was created to analyze the economic effects of byways on local/regional economies. HDR used the JTHG NHA as a case study, analyzing tourism and investment data associated with the byway in 2008 to assess the Tool. Overall, HDR found that, via the economic multipliers, tourists patronizing the byway (the majority of whom were overnight visitors, with the average visitor spending just shy of \$70 per trip on accommodations/lodging) and public investments totaling over \$1.5 million resulted in more than 6,500 jobs created, over a billion dollars in aggregate business sales, and an over \$165 million rise in total earnings.

"LAKE COUNTRY SCENIC BYWAY: AWARENESS, IMPACT ON QUALITY OF LIFE & ECONOMY"

The Lake Country Scenic Byway program in Minnesota conducted an analysis in 2009/2010 to garner a deeper understanding of the byway, its visitors, and its local impacts. In a survey, approximately seventy percent of residents in the area knew of the byway, as well as almost half of the travelers; the majority of both residents and travelers learned about the byway through word of mouth. Regarding quality-of-life impacts, residents taking the survey indicated that the byway provided the most benefit in preserving natural areas and historical sites. Although there was some uncertainty around the estimates of the economic impact of the byway on the regional economy (depending on what assumptions were utilized), the study reported that due to 51,000 byway visitors spending nearly \$30 million in the area in 2010, positive economic ripple effects, through the multiplier effect, reverberated out throughout the region, helping the area to realize nearly \$32 million in economic output, over 500 jobs, and about \$11 million in increased labor income.

"THE BEARTOOTH HIGHWAY: 2012-2013 ECONOMIC IMPACTS, USE, AND DESTINATION IMAGE"

This report is a compilation of three studies conducted by researchers at the University of Montana and its Institute for Tourism and Recreation Research. The report analyzes the economic impact of the Beartooth Highway, an "All-American Highway" running nearly seventy miles through Montana and Wyoming, across different seasons from 2012 to 2013. It also analyzes a visitors' assessment and recreational use of the Beartooth Highway and its adjacent amenities (it is important to note that this research is also used for the author's master's thesis at the University of Montana). Over the study period, from summer 2012 through winter 2012-2013, the researchers estimated that the total economic impact from Beartooth Highway was \$53 million, mainly driven through non-local visitor spending that had a positive fiscal ripple effect across the regional economy. During the summer, most survey respondents indicated that they considered the highway to be their primary destination, with "scenic driving" and "nature photography" as the most frequently cited pastimes along Beartooth. Image perception, as the authors note, was particularly positive around Beartooth Highway in the winter, when many tourists travel there to go snowmobiling.

"SCENIC BYWAY 12 ECONOMIC IMPACTS"

Zions Bank Public Finance (ZBPF) was commissioned by the Scenic Byway Committee in Utah to assess the economic impact of Scenic Byway 12 on the local economy. Through multiple survey analyses, the authors of the report estimate that the aggregate economic impact per year of the byway is approximately \$13 million due to an over 60,000 increase in the number of visitor trips taken on Scenic Byway 12, with each visitor group spending about \$900 during their trips. While total visitation along the byway was about 25% higher in 2012 than in 2001, average visitation levels fell by five percent when comparing average visitor counts from 1991 through 2001 to average visitor counts from 2002 to 2012. Real total taxable sales per capita increased nearly thirty percent for

counties and cities along the byway from 2002 through 2012, compared to a one percent increase that the state of Utah experienced over the same period.

“ECONOMIC ASSESSMENT OF THE *SCENIC SUMTER HERITAGE BYWAY* IN SUMTER COUNTY, FLORIDA”

Prepared for the Florida Department of Transportation (FDOT), this report consists of analysis conducted by a University of Florida research team that assessed the total economic effects of the Scenic Sumter Heritage Byway (SSHB). Public survey results in the analysis indicate that the primary reason visitors patronize the byway is to attend a community event, as well as to sightsee or explore the local history of the region. It is also interesting to note that in the same survey, a significant majority of survey respondents were very or moderately satisfied with the byway (76%) and would likely visit again (80%).

The report also demonstrates the positive economic benefits that the byway yields for the area: not only do visitors spend an average of \$135 to \$170 per trip (per respondents’ survey answers), but this and other spending associated with the byway have ripple effects in the economy via the economic multipliers, resulting in 45 jobs created, over a \$2 million increase in Gross Regional Product (GRP), over \$3.5 million in business revenues, \$243,000 in local/state government tax receipts and \$350,000 in federal tax revenues (these include direct and indirect/induced effects). To gauge the social impacts of the Scenic Sumter Heritage Byway (SSHB), the report included the byway’s social return on investment (SROI), which factors in volunteer time as a variable in determining return on investment: at 3.5 to 1, the SROI ratio further bolsters the SSHB as a worthwhile investment in the region.

“LOUISIANA SCENIC BYWAYS”

This report assessed the Louisiana Scenic Byway program (LBP) and was completed by researchers at the University of New Orleans and Louisiana State University, for the Louisiana Department of Culture, Recreation, and Tourism. The researchers found that although it realized a positive return on investment for the state, the LBP was not well known to residents or tourists and that there was not a robust system in place to track the number of visitors that patronized it. The authors recommended that the administrators of the LBP increase online marketing of the byway to make it more conspicuous to travelers that frequent it, as well as to put in place a system to monitor the number of visits to the byway to better gauge its contributions to the state.

ATTACHMENT C: WHAT IS ECONOMIC IMPACT ANALYSIS?

The purpose of conducting an economic impact study is to ascertain the total cumulative changes in employment, earnings and output in a given economy due to some initial “change in final demand”. To understand the meaning of “change in final demand”, consider the installation of a new widget manufacturer in Anytown, USA. The widget manufacturer sells \$1 million worth of its widgets per year exclusively to consumers in Canada. Therefore, the annual change in final demand in the United States is \$1 million because dollars are flowing in from outside the United States and are therefore “new” dollars in the economy.

This change in final demand translates into the first round of buying and selling that occurs in an economy. For example, the widget manufacturer must buy its inputs of production (electricity, steel, etc.), must lease or purchase property and pay its workers. This first round is commonly referred to as the “Direct Effects” of the change in final demand and is the basis of additional rounds of buying and selling described below.

To continue this example, the widget manufacturer’s vendors (the supplier of electricity and the supplier of steel) will enjoy additional output (i.e. sales) that will sustain their businesses and cause them to make additional purchases in the economy. The steel producer will need more pig iron and the electric company will purchase additional power from generation entities. In this second round, some of those additional purchases will be made in the US economy and some will “leak out”. What remains will cause a third round (with leakage) and a fourth (and so on) in ever-diminishing rounds of industry-to-industry purchases. Finally, the widget manufacturer has employees who will naturally spend their wages. Again, those wages spent will either be for local goods and services or will “leak” out of the economy. The purchases of local goods and services will then stimulate other local economic activity. Together, these effects are referred to as the “Indirect Effects” of the change in final demand.

Therefore, the total economic impact resulting from the new widget manufacturer is the initial \$1 million of new money (i.e. Direct Effects) flowing in the US economy, plus the Indirect Effects. The ratio of Total Effects to Direct Effects is called the “multiplier effect” and is often reported as a dollar-of-impact per dollar-of-change. Therefore, a multiplier of 2.4 means that for every dollar (\$1) of change in final demand, an additional \$1.40 of indirect economic activity occurs for a total of \$2.40.

Key information for the reader to retain is that this type of analysis requires rigorous and careful consideration of the geography selected (i.e. how the “local economy” is defined) and the implications of the geography on the computation of the change in final demand. If this analysis wanted to consider the impact of the widget manufacturer on the entire North American continent, it would have to conclude that the change in final demand is zero and therefore the economic impact is zero. This is because the \$1 million of widgets being purchased by Canadians is not causing total North American demand to increase by \$1 million. Presumably, those Canadian purchasers will have \$1 million less to spend on other items and the effects of additional widget production will be canceled out by a commensurate reduction in the purchases of other goods and services.

Changes in final demand, and therefore Direct Effects, can occur in a number of circumstances. The above example is easiest to understand: the effect of a manufacturer producing locally but selling globally. If, however, 100% of domestic demand for a good is being met by foreign suppliers (say, DVD players being imported into the US from Korea and Japan), locating a manufacturer of DVD players in the US will cause a change in final demand because all of those dollars currently leaving the US economy will instead remain. A situation can be envisioned whereby a producer is serving both local and foreign demand, and an impact analysis would have to be careful in calculating how many “new” dollars the producer would be causing to occur domestically.

APPENDIX D: INTERVIEWEES

A group of representatives from both Dorchester and Caroline Counties was reached out to for interviews. The following are those who participated:

- ◆ Katie Clendaniel – Downtown Cambridge
- ◆ Tony Cohen – Chesapeake Tours
- ◆ Norma Dobrowolski – Ocean City MD Tourism
- ◆ Jennifer Layton – Layton's Chance Vineyards and Winery & Lazy Day Farms
- ◆ Dana McGrath – Dorchester Skipjack Committee
- ◆ Hyatt Regency – Joel Bunde & Cari Ruppert
- ◆ Gretchen Smith – Neema Hospitality
- ◆ Amy Taylor - Honey Bee Trading Post

APPENDIX E: ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 41 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter @camoinassociate and on Facebook.

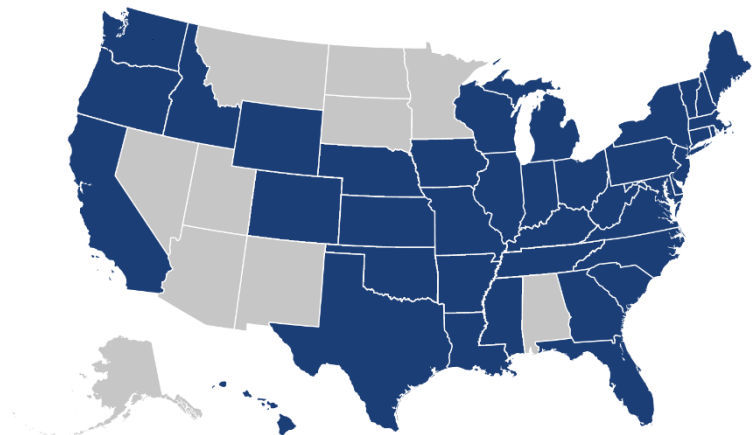
THE PROJECT TEAM

Rachel Selsky
Project Principal

Dan Gundersen
Senior Advisor

Amie Collins
Project Manager

Jessica Tagliafierro
Lead Analyst





Leading action to grow your economy

Saratoga Springs, NY
Richmond, VA
Portland, ME
Boston, MA
Brattleboro, VT

