



River Park Visitor Profile and Tourism Economic Impact Study

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EXECUTIVE SUMMARY

This visitor profile and economic impact study for the River Park was conducted via the online survey platform--Prolific with a total of 4,877 participants from eight targeted states, namely Kentucky (KY), Maryland (MD), New York (NY), Ohio (OH), Pennsylvania (PA), Virginia (VA), Washington DC, and West Virginia (WV). These participants took part in the initial survey. Subsequently, 382 respondents who reported having visited Cumberland, MD in the previous 12 months were selected to participate in a comprehensive follow-up survey. This two-tiered approach ensured a broad yet detailed understanding of visitor demographics, behaviors, and the economic contributions stemming from visits to the area, specifically in relation to the River Park.

The primary objective of this study is to assess the projected increase in visits and the corresponding economic effects resulting from the proposed development of the River Park. The analysis estimates that the construction of the park is likely to boost visits by 1,053,053 (with a 70% probability), generating a direct economic impact of \$219,931,773, supporting 2,412 jobs. Furthermore, the overall economic impact is anticipated to reach \$307,335,643, supporting 2,901 jobs. This underscores the significant potential of the River Park to drive economic growth and job creation in the area, highlighting its value not just as a recreational asset but also as a catalyst for local economic development. The study also estimated the total number of visits to Cumberland and to Allegany County as a whole in the past 12 months, which are 988,095 and 1,294,109, respectively.

In terms of visitor profiles, the study found that four states—Maryland, Pennsylvania, New York, and Virginia—combined accounted for the majority of the respondents (78.9%), with Maryland contributing the largest portion of the sample at 22.7%, followed by Pennsylvania (21.3%), New York (18.8%), and Virginia (16.1%). Summer is the season most respondents reported visiting the city, with 56.9% of responses, followed by spring at 39.7% and fall at 28.7%, while winter was reported as the least visited season, at 22.3%. Rocky Gap State Park was the most popular attraction in the area. Nearly half (47.6%) of respondents reported having visited the park.

The average number of visits in the previous 12 months is 2.28 times, and the average group size is 3.2. In addition, over two-thirds of respondents reported staying overnight during their most recent trip to the city (67.9%), while 32.1% of respondents were day-trippers. The average number of nights stayed is 3.5.

Nearly 90% of respondents will speak positively about the city, 85% will recommend the city to family and others, and 80% intend to revisit within the following 12 months. When asked about the likelihood of recommending the proposed River Park to others, the average likelihood is 76.5%.

1. Introduction

The World Tourism Organization estimates that international tourism arrivals reached 1.4 billion in 2018 with total tourism receipts being \$US 1.7 trillion for the same year (WTO, 2019). Ceballos-Lascurain cites a WTO estimate that nature-based tourism generates 7% of international tourism expenditure (Lindberg et al., 1997). A study undertaken for the World Resources Institute found that this type of tourism is increasing at an annual rate of between 10% and 30% (Reingold, 1993). The term nature-based tourism is generally applied to tourism activities depending on the use of natural resources which remain in a relatively undeveloped state, including scenery, topography, waterways, vegetation, wildlife, and cultural heritage (Ceballos-Lascurain, 1996). A recent study by the Bureau of Economic Analysis of the U.S. Department of Commerce (Headwaters Economics, 2021) revealed that in 2020, outdoor recreation, even hit hard by the Covid-19 pandemic, still contributed \$374 billion or 1.8% to the nation's GDP, about three times the amount of oil and gas development (Headwaters Economics, 2021). This so-called "recreation economy" has been recognized as one of USDA's top priorities in the Memorandum of Understanding (MOU) signed in 2022 by the USDA Rural Development, Forest Service, and National Institute of Food and Agriculture (NIFA).

Cumberland, MD, as one of the important nature-based tourism destinations in the Appalachian region, is well known for its natural and cultural assets. To add to its existing tourism attractions, a River Park at Canal Place was proposed to be constructed. The park includes property in both Maryland and West Virginia. It encompasses approximately 2 miles along the Potomac River, including the adjacent shorelines up to the top of the US Army Corps of Engineers (USACE) levee. This 2-mile stretch is located approximately 0.5 miles upstream of the Blue Bridge and extends 1.5 miles downstream to the Carpendale Trestle (Figure 1).

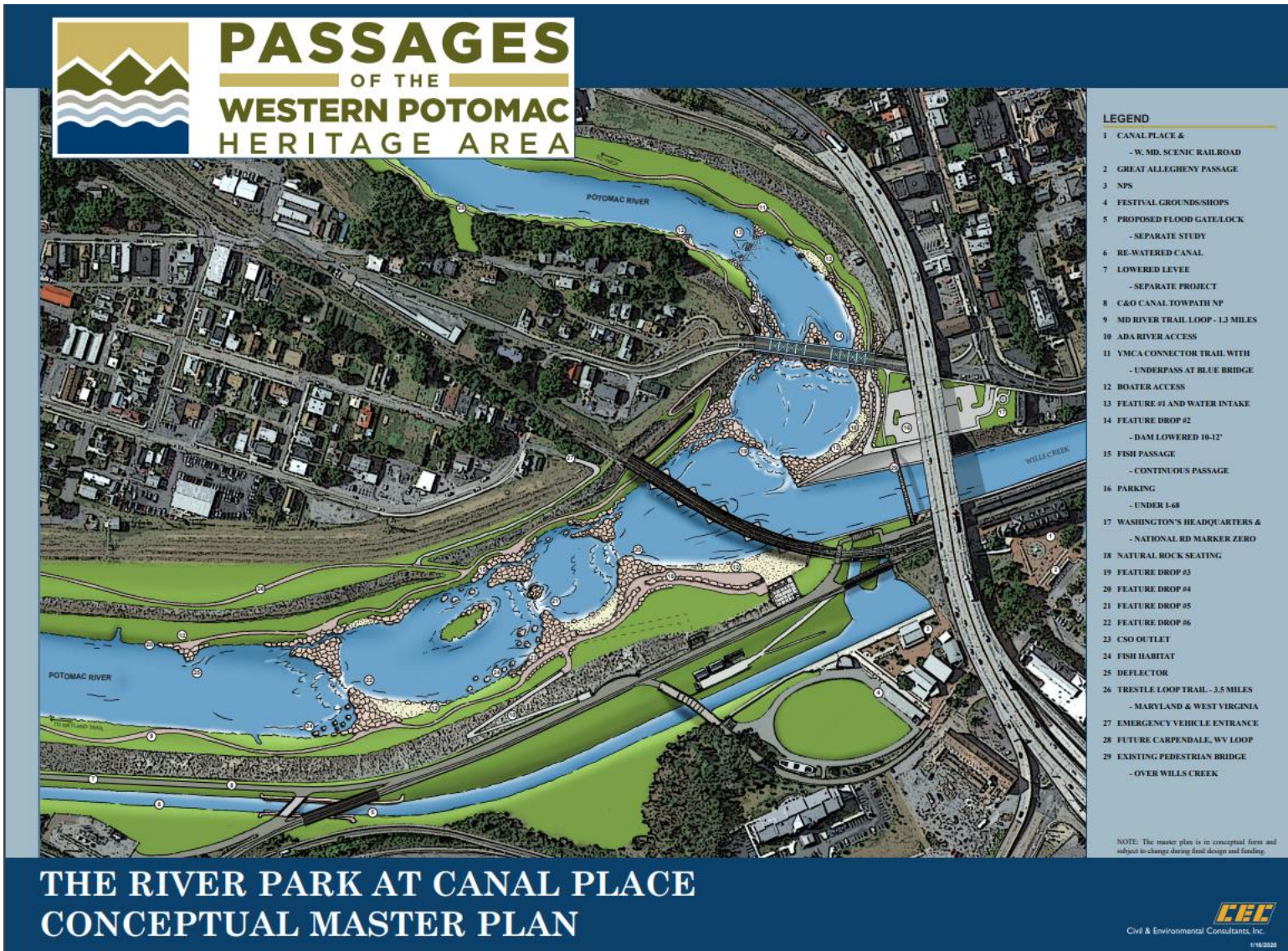


Figure 1. The conceptual master plan of the River Park

Adjacent to River Park, numerous historic properties, including the C&O Canal Towpath National Historic Park and the National Road, offer cultural significance. Additionally, tourism opportunities abound with the presence of the Great Allegheny Passage trail and the Western Potomac Scenic Railroad.

As a dedicated advocate for the conservation and sustainable management of natural resources, The Canal Place Preservation & Development Authority (CPPDA) is keenly interested in understanding how the park contributes to the local and regional economy. To this end, the Recreation, Parks, and Tourism Resources Program (RPTR) at West Virginia University (WVU) was contracted to conduct a market survey that examines the visitor economic impact of the River Park.

2. Methods

In this study, we implemented a structured methodology to assess visitor profiles and tourism economic impacts associated with the River Park. Our approach encompassed three key stages:

- 1) Onsite Surveys in Cumberland, MD: These surveys were conducted to identify the primary tourism markets for Cumberland and to test the effectiveness of the questionnaire designed for subsequent online surveys.
- 2) Initial Online Survey: This preliminary survey aimed to identify individuals who had visited any location in Allegany County, MD, during the specified period (December 1, 2022, to November 30, 2023). The survey distinguished between those who had and had not visited the area.
- 3) Comprehensive Online Survey for Past Visitors: Targeting only individuals who had visited Cumberland, MD, in the preceding 12 months, this detailed survey sought to gather in-depth data on visitor profiles and spending patterns.

The primary objective of the initial online survey was to estimate the total number of visits to both Allegany County and Cumberland, specifically highlighting any increase in visits attributable to the River Park's construction. The comprehensive survey aimed to collect detailed information on visitor spending. These data points were then utilized to calculate the overall economic impact resulting from the development of the River Park. The combination of both onsite surveys and online surveys has also been used in other studies (e.g., Kyle et al., 2022).

2.1. Questionnaire

The questionnaire for the initial survey and the questionnaire for the full-length survey are included as Appendix A and Appendix B. The full-length survey questionnaire consisted of five sections, including: 1) background information, 2) trip characteristics, 3) perceptions of the River Park, 4) Spending in Cumberland, MD, and 5) socio-demographics. The questionnaire was built into Qualtrics and reviewed and approved by West Virginia University IRB.

2.2. Data collection and data analysis

The questionnaire was built in Qualtrics and integrated into Prolific which was used as the survey platform for this study. Based on the onsite surveys, previous studies in the area, and personal communications with Ashli Workman, Director of Tourism of Allegany County, the target states for Cumberland included Kentucky (KY), Maryland (MD), New York (NY), Ohio (OH), Pennsylvania (PA), Virginia (VA), Washington DC, and West Virginia (VA), with a total of 8,701 eligible participants. Specifically, for the initial survey, the purpose of the survey was described as follows:

The purpose of this short screening survey is to identify who have or have not visited any places in Allegany County, Maryland, from December 1, 2022 to November 30, 2023. Only those who have visited the country during the past 12 months will be invited again to participate in the follow-up full-length survey.

This initial short survey takes approximately 1 to 2 minutes to complete and pays \$1.00.

For the follow-up full length survey, the following description was used:

You recently participated in a short screening survey on "River Park Visitor Profile and Tourism Economic Impact Study." You are invited again to participate in the second survey that targets those who met the screening criteria: at least 18 years old and have travelled at least once to Cumberland, Maryland in the past 12 months (December 1, 2022 - November 30, 2023).

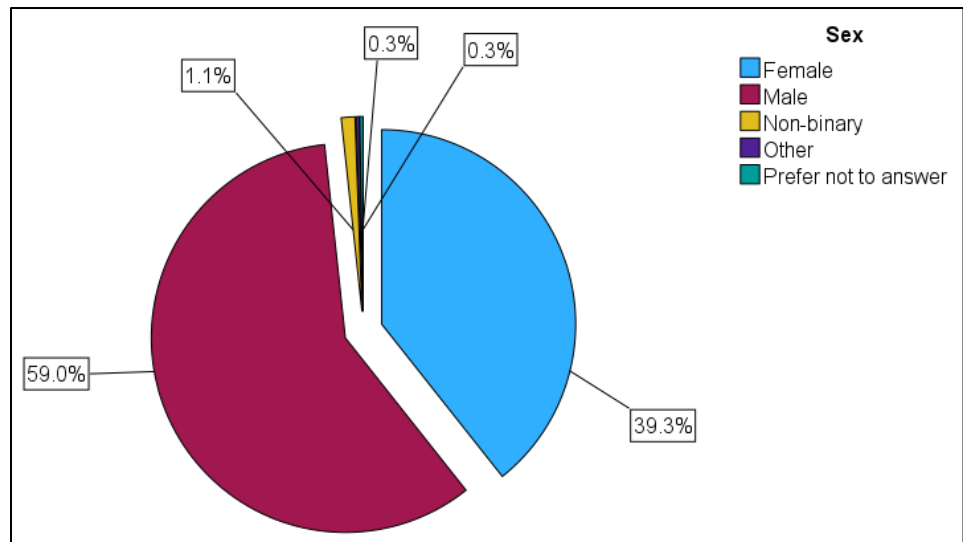
This study is being conducted by the Canal Place Preservation & Development Authority (CPPDA), Maryland with assistance from West Virginia University. It takes approximately 5 minutes and pays \$3.00.

The initial survey started on December 20, 2023 and ended January 10, 2024, with 4,877 respondents. Of this number, 477 valid respondents who reported having visited Cumberland in the past 12 months were then invited again to participate in the full-length survey, which started on December 21 and ended on January 10, 2024. Of the 477 participants invited, 382 responded, resulting in a response rate of 80.1%. Of the 382 respondents, 23 were removed due to systematic incomplete responses, resulting in 359 valid responses for further analysis.

3. Results

3.1. Demographics

Of the 365 valid respondents, over half of them were males (59.0%) while females accounted for 39.3%. In addition, a small percent of respondents identified themselves as non-



binary (1.1%) while 0.3% preferred not to answer (Figure 2).

Most respondents were young, with 71.2% of them ranging between 18 and 44 years old (14.8% for age 18-24, 34.5% for age 25-34, and 22.2% for age 35-44, respectively) (Figure 3).

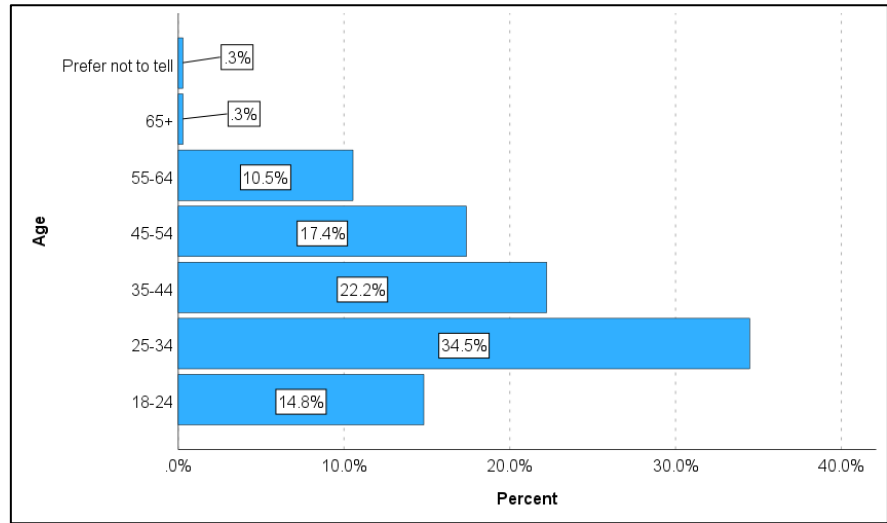


Figure 3. Respondents by age

Respondents between 45 and 64 years old accounted for 27.9% while a small percent of respondents aged 65 and over (0.3%). In addition, 0.3% of respondents preferred not to tell.

Figures 4 and 5 present respondents by education and income, respectively. As shown, most respondents were well educated and affluent. Specifically,

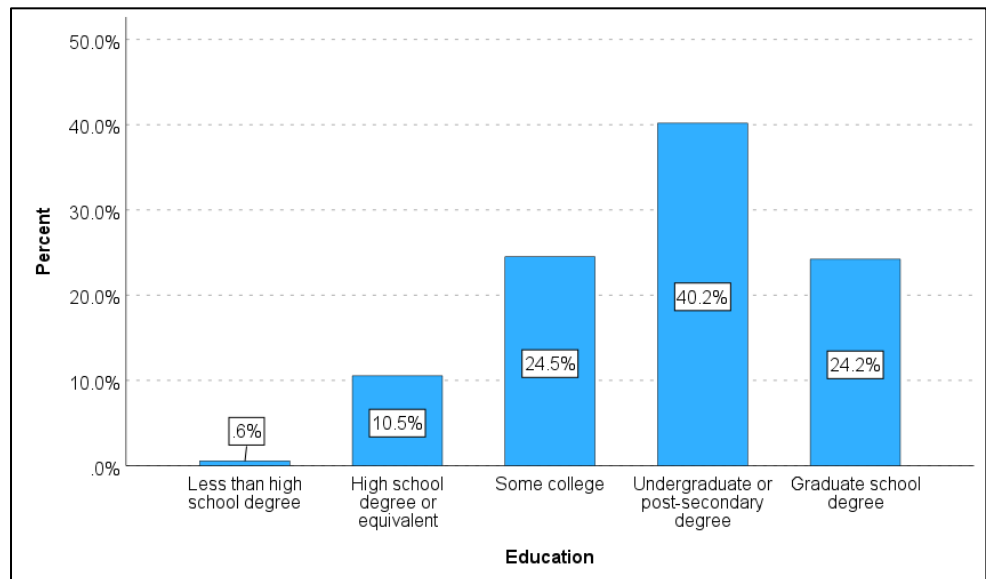


Figure 4. Respondents by education

88.9% had some college level education (24.5%) or college degree (40.2% undergraduate or post-secondary degree and 24.2% graduate school degree). In

addition, 10.5% had a high school degree or equivalent while a small percent of respondents (0.6%) had a less than high school degree.

In terms of household income before taxes, half of the respondents (50.1%) reported a household income below \$80,000 (22.5%,

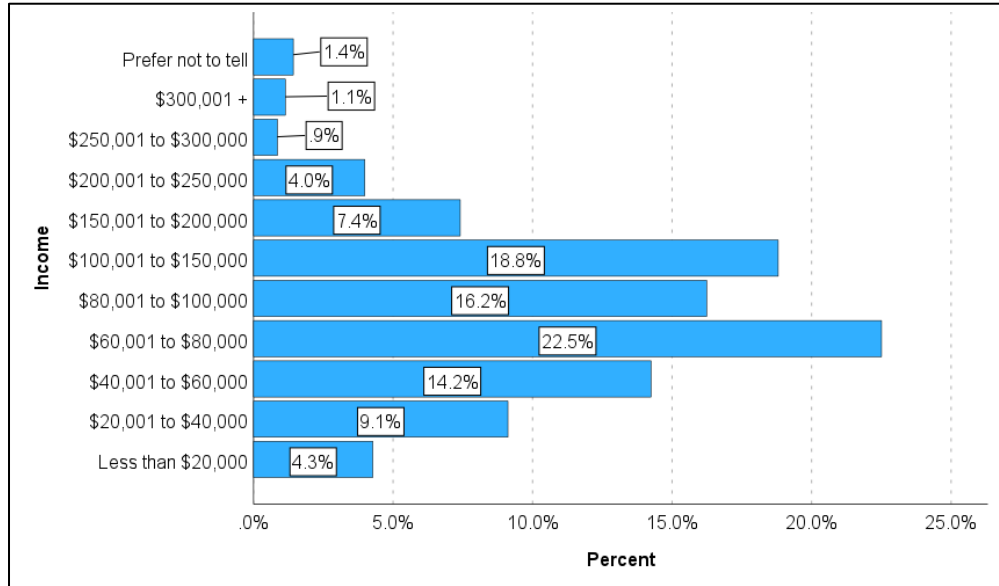


Figure 5. Respondents by income

14.2%, 9.1%, and 4.3% had an income between \$60,001 and \$80,000; between \$40,001 and \$60,000; between \$20,001 and \$40,000, and less than \$20,000, respectively). The rest of 49.9% reported an income of \$80,001 or above (16.2%, 18.8%, and 7.4% reported a household income between \$80,001 and \$100,000, between \$100,001 and \$150,000, and between \$150,001 and \$200,000, respectively).

3.2. Trip characteristics

Seasons in which respondents visited Cumberland, MD

Participants were asked to indicate the seasons in which they visited Cumberland, MD in the previous 12 months (December 1, 2022 – November 30, 2023). Results are presented in Table 1. As shown in the Table, summer is the season most respondents reported visiting the city

(56.9%), followed by spring (39.7%) and fall (28.7%), while winter was reported as the least visited season (22.3%).

Table 1. Seasons in which respondents visited Cumberland, MD

Seasons visited	Responses		Percent of cases
	N	(%)	(%)
Winter	79	15.1	22.3
Spring	141	26.9	39.7
Summer	202	38.5	56.9
Fall	102	19.5	28.7
Total	524	100.0	147.6

Note: This is a multiple-response question where percent of response is the percentage of each response out of the total number of responses with a sum total of percent of response being 100 while percent of cases refers to the percent of respondents who visited the city during a given season.

Origin of respondents by state

Figure 6 presents the origin of respondents by state (without sampling adjustment). Of the eight targeted states, four states (Maryland, Pennsylvania, New York, and Virginia) combined accounted for most of the respondents

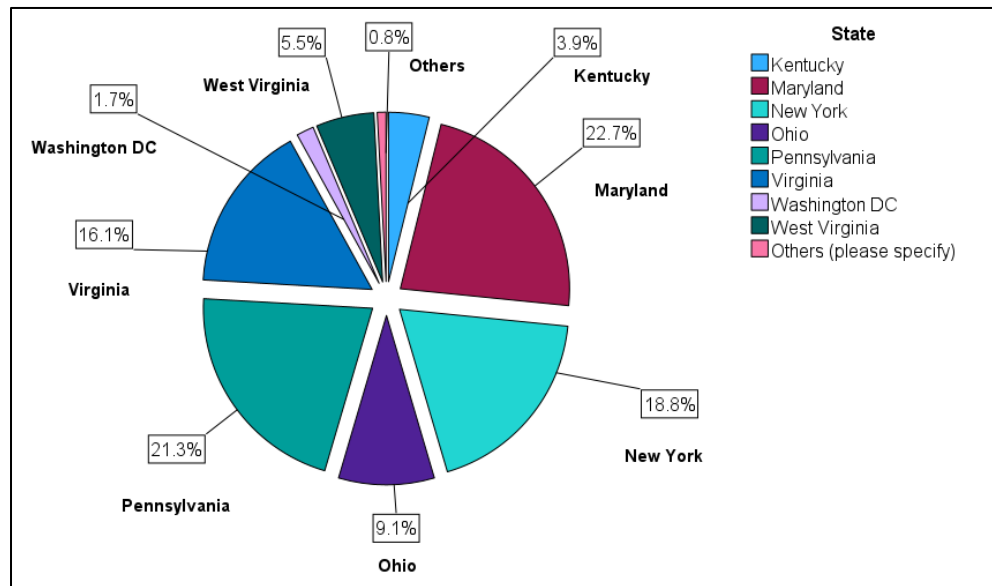


Figure 6. Origin of respondents by state

(78.9%), with 22.7% of respondents being from Maryland, the largest portion of the sample, followed by Pennsylvania (21.3%), New York (18.8%) and Virginia (16.1%). It is worth noting that the percentage for each state should not be used as a proxy for market segments for the area because the survey participants were intentionally limited to the eight targeted states.

Places visited

Table 2 presents places in Cumberland that respondents have visited during the previous 12 months. Rocky Gap State Park was the most popular attraction in the area. Nearly half (47.6%) of respondents reported having visited the park. The second most popular place is Allegany Museum (31.8%), followed by Cumberland Visitor Center (27.8%) and C&O Canal National Historical Park (22.3%). The least visited places/events include National RD Marker Zero (2.6%), Emmanuel Episcopal Church (4.6%), and DelFest (7.2%).

Table 2. Places visited.

Places visited	Responses		Percent of cases*
	N	(%)	(%)
Rocky Gap State Park**	166	17.5	47.6
Allegany Museum	111	11.7	31.8
Cumberland Visitor Center	97	10.2	27.8
C&O Canal National Historical Park	78	8.2	22.3
Western Maryland Scenic Railroad	76	8	21.8
Western Maryland Rail Trail	73	7.7	20.9
Rocky Gap Casino Resort	67	7.1	19.2
Great Allegheny Passage	61	6.4	17.5
C&O Canal Towpath	53	5.6	15.2
Paw Paw Tunnel	52	5.5	14.9
Washington's Headquarters	41	4.3	11.7
DelFest	25	2.6	7.2
Emmanuel Episcopal Church	16	1.7	4.6
National RD Marker Zero	9	0.9	2.6
Others	23	2.4	6.6
	948	100.0	271.6

Note: This is a multiple-response question where percent of response is the percentage of each response out of the total number of responses with a sum total of percent of response being 100 while percent of cases refers to the percent of respondents who visited a given place.

*Ordered by percent of cases from the largest to the smallest.

** When the frequency is analyzed specifically for the park, the valid response rate is 46.2%, accounting for missing data. This valid response rate is utilized to estimate the total number of visits to the city.

Activities

Respondents were asked to indicate activities they participated in during all trips to Cumberland in the past 12 months. As shown in Table 3, the top three most popular activities are hiking/walking (62.6%), dining locally (49.4%), and sightseeing (44.3%), followed by shopping (39.7%), history/cultural interest (38.6%), photography (38.3%), and scenic driving (36.3%). The least popular activities include hunting (2%), rail biking (2.6%), interpretive programs/exhibits (4.6%), and mountain biking (4.9%).

Table 3. Activities that respondents reported having participated in.

Places visited	Responses		Percent of cases*
	N	(%)	(%)
Hiking/walking	219	11.9	62.6
Dining locally	173	9.4	49.4
Sightseeing	155	8.4	44.3
Shopping	139	7.6	39.7
History/cultural interest	135	7.3	38.6
Photography	134	7.3	38.3
Scenic driving	127	6.9	36.3
Visit to a museum or attraction	125	6.8	35.7
Birding	89	4.8	25.4
Cycling/biking	68	3.7	19.4
Picnicking/cooking-out	53	2.9	15.1
Dog walking	48	2.6	13.7
Fishing	41	2.2	11.7
Special events	39	2.1	11.1
Climbing	38	2.1	10.9
Scenic railroad trail ride	38	2.1	10.9
Playground	34	1.8	9.7
Visit to winery, brewery, distillery	34	1.8	9.7
Visit to an art gallery	32	1.7	9.1
Canoeing/kayaking/rafting	30	1.6	8.6
Swimming	22	1.2	6.3
Mountain biking	17	0.9	4.9
Interpretive programs/exhibits	16	0.9	4.6
Rail biking	9	0.5	2.6
Hunting	7	0.4	2.0
Other	17	0.9	4.9
Total	1839	100	525.4

Note: This is a multiple-response question where percent of response is the percentage of each response out of the total number of responses with a sum total of percent of response being 100 while percent of cases refers to the percent of respondents who visited a given place.

*Ordered by percentage of cases from the largest to the smallest.

Travel purposes

In terms of travel purposes (note; respondents were allowed to choose multiple purposes), most respondents (79.8%) traveled to city for leisure/holiday/vacation, followed by visiting friends and/or relatives (49.1%), and business (8.0%). There were a small number of respondents (2.8%) who reported having visited the area for other reasons.

Table 4. Travel purposes.

Reasons for visiting the area	Responses		Percent of Cases
	N	(%)	(%)
Leisure	281	57.1	79.8
VRF	173	35.2	49.1
Business	28	5.7	8.0
Other	10	2.0	2.8
Total	492	100.0	139.8

Frequency of visits and group size

Respondents were asked to report how many times they have visited the city in the past 12 months. The average number of visits in the previous 12 months is 2.28 times. Responses were also asked to report their group size, which is 3.2 on average, ranging between 1 and 20.

Overnight stay

Over two thirds of respondents reported staying overnight during their most recent trip to the city (67.9%) while 32.1% of respondents were day trippers. The average number of nights is 3.5, ranging from 1 to 25.

Table 5 presents responses on where respondents have stayed during their most recent trip to the city (note; as with their responses on travel purposes, respondents were also allowed to

choose multiple lodging types). As shown, most stayed in hotels/motels/inns (45.6%), followed by friends and/or relatives (32.2%), Airbnb (30.5%), camping/tents (8.8%), Bed & Breakfast (7.9%), and rented houses/apartments (6.3%). A small number of respondents stayed in RV (2.1%) and second homes (1.3%).

Table 5. Respondents by lodging types.

Lodging	Responses		Percent of cases*
	N	(%)	(%)
Hotel/motel/inn	109	33.7	45.6
Friends and/or relatives	77	23.8	32.2
Airbnb	73	22.6	30.5
Camping/tent	21	6.5	8.8
Bed & Breakfast	19	5.9	7.9
Rented house/apartment/VRBO	15	4.6	6.3
RV	5	1.5	2.1
Second home	3	0.9	1.3
Other	1	0.3	0.4
Total	323	100.0	135.1

*Ordered by percentage of cases from the largest to the smallest.

Travel composition

Figure 7 presents participants’ travel composition during their most recent trip to the city. As shown, over half of the respondents reported being with relatives/family, followed by with friends (25.6%), and both friends and relatives/family (13.6%), while 6.0% of them travelled alone.

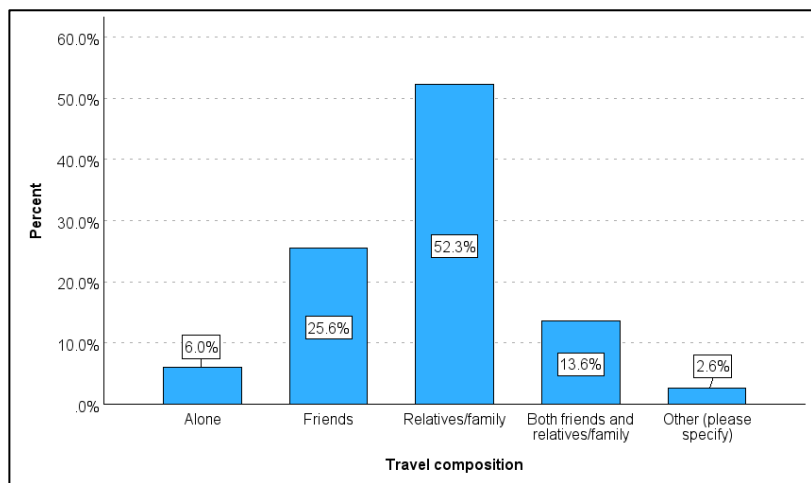


Figure 7. Travel composition

Recommendation

Respondents were asked to indicate to what extent recommendations from others influenced their current visit to the city on a scale of 0 to 100, where 0 implies no influence and 100 signifies complete influence. It was found that 7.5% of respondents reported a score of 0, indicating no influence, while 2.9% reported a score of 100, indicating complete influence. In addition, 54.4% of respondents reported a score less than 50, while 31.5% of respondents reported a score greater than 70. The average score is 48.43 (Figure 8).

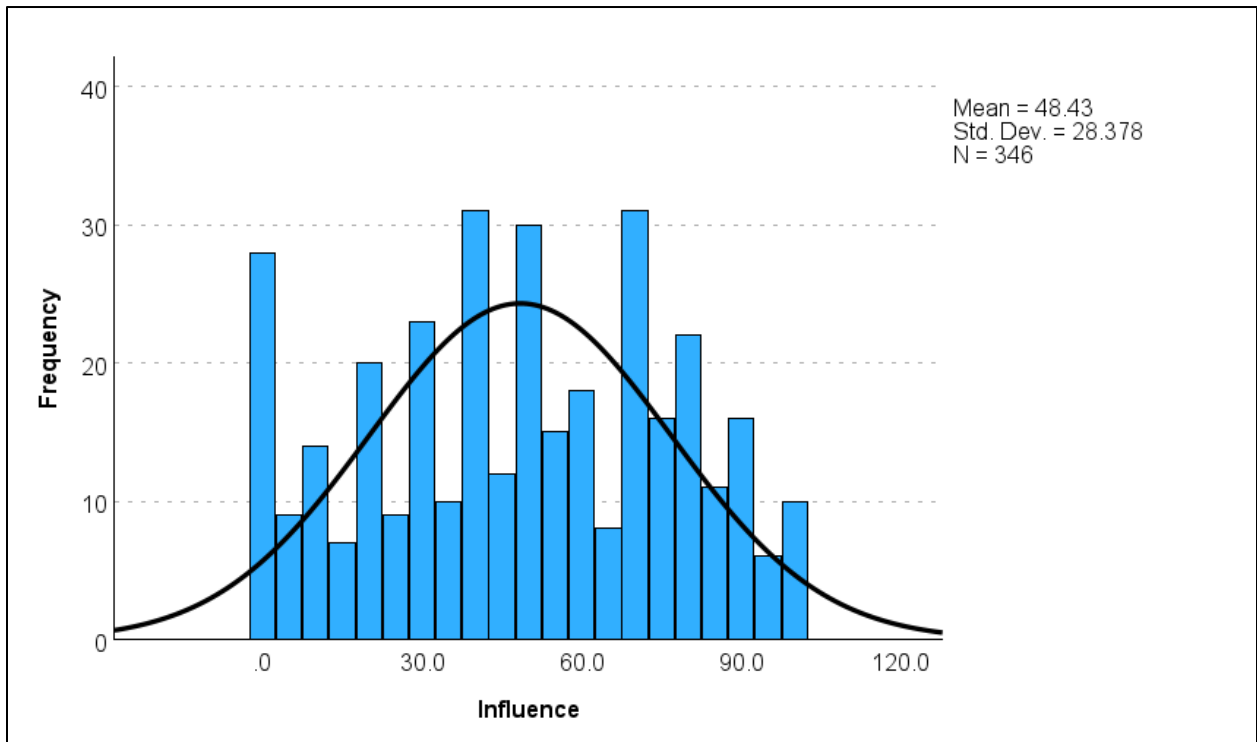


Figure 8. Histogram of recommendation influence

Destination loyalty

Four items were used to measure respondents' destination loyalty to the city (Yuan et al., 2021). Results are presented in Table 6. Nearly 90% of respondents will speak positively about the city, 85% will recommend the city to family/others, and 80% will revisit again in the

following 12 months. Relatively, a smaller percentage of respondents (60.3%) will share their experience on social media. When asked how likely they will recommend the proposed River Park to others, the average likelihood is 76.5%.

Table 6. Destination loyalty.

Item	Very Unlikely (%)	Unlikely (%)	Neutral (%)	Likely (%)	Very Likely (%)	Likely + Very Likely
Will recommend to family/others	0.6	3.1	11.4	39.9	45.0	84.9
Will speak positively about the city	0.3	0.6	11.1	37.5	50.6	88.1
Will share my experience on social media	10.5	12.5	16.8	31.3	29.0	60.3
Will revisit again in the following 12 months	1.7	4.8	13.9	41.8	37.8	79.6

River Park activities

Participants were asked to indicate how likely they will participate in an activity related to the park if they plan to revisit Cumberland in the next 12 months on a scale of 0 to 100, where 0 implies not likely at all and 100 indicates very likely. The mean scores are presented in Table 7. The most popular activity is taking photos (78.5), followed by sightseeing (77.7), and using land based accompanying trails (67.1), while kayaking/rafting is the least popular activity (40.6).

Table 7. River Park activities that respondent may participate in.

	Minimum	Maximum	Mean	Std. Deviation
Kayaking/rafting	0	100.0	40.6	34.7
Spectating	0	100.0	63.3	28.5
Sightseeing	0	100.0	77.7	24.0
Taking photos	0	100.0	78.5	26.7
Using land based accompanying trails	0	100.0	67.1	28.1

3.3. Economic impact analysis

3.3.1 Estimates of total visits for Cumberland, Allegany County, and River Park

To estimate the total number of visits to Cumberland, we employed a methodology that leverages a benchmark figure from a well-attended local attraction. Specifically, we used the 2023 visitation figure for Rocky Gap State Park, which stood at 913,000, as provided by Ashli Workman, the Director of Tourism for Allegany County, through personal communications. This number served as a reference point for our calculations. By analyzing survey responses, we found that 46.2% of respondents indicated they had visited the park, with an average of two visits per respondent. Based on these data, we extrapolated the total visitation figures for Cumberland as follows:

$$\text{Total visits for Cumberland} = 913000 / .462 / 2 = 988,095$$

From the initial survey, 30.97% of respondents reported having visited Allegany County, but not Cumberland, based on this information, the total number of visits for the county would be:

$$\text{Total visits for Allegany County} = 988,095 + 988,095 * .3097 = 1,294,109$$

The estimation of additional visits attributed to the construction of the River Park is calculated by the following formulas:

$$\text{sampled visits to Allegany} / \text{sampled non visits to Allegany} = 1156 / 3713 = 0.31133854$$

$$\text{Total non-visits} = 1,294,109 / 0.31133854 = 4,156,597.506$$

$$\text{Total additional visits} = \text{total non-visits} * [\text{highly possible visits sampled} / \text{highly impossible visits sampled}] = 4,156,597.506 * [871 / 3438] = 4,156,597.506 * 0.253344968 = 1,053,053$$

The total of 1,053,053 visits was calculated based on respondents who had not visited Allegany County in the past year but reported a 70% probability of visiting the park after its construction. The average score (70-100%) is 81.1%. Below is the question used in the survey:

If you currently have no plans or are unsure about visiting the county in the next 12 months, please consider this scenario: River Park will be open to the public after its construction within this timeframe. How likely are you to visit the park? Is it likely to be a primary draw for you, or just one among several attractions in the county? Adjust the slider below on a scale from 0 (River Park is not a factor in visiting the county) to 100 (River Park is the primary reason for visiting the county) (Tyrrell & Johnston, 2001; Yuan et al., 2018).

0 10 20 30 40 50 60 70 80 90 100

3.3.2 Visitor spending of the River Park

Table 8 presents the trip spending per person for those who visited Cumberland in the previous year. On average, each visitor spent \$84.5 on lodging, \$83.8 per trip on restaurants and bars, \$55 on shopping, \$34.0 on groceries, \$33.4 on gas, automobile service, repair, and \$32.4 on admission/fees.

Table 8. Trip spending per person.

	Min.	Max.	Mean	Std. Deviation
Gas, automobile service, repair	0	200.0	33.4	31.19
Lodging (hotel, motel, condos, etc.)	0	1200.0	84.5	140.76
Restaurants and bars s (food & beverages, etc.)	0	750.0	83.8	94.79
Groceries take-out food/drinks, sundries	0	400.0	34.0	49.18
Shopping (souvenirs, gifts, clothing, etc.)	0	500.0	55.1	76.66
Outdoor recreation equipment purchase or rental (skiing, biking, etc.)	0	365.0	27.8	54.85
Admissions and fees (seasonal pass, tickets for train rides, events, theaters, activities, etc.)	0	350.0	32.4	47.83
Others	0	350.0	14.5	38.56

Table 9 presents the total spending and adjusted total spending associated with the River Park. As shown, the total spending is estimated to be \$384,890,871.5. As aforementioned, for

those who did not visit Allegany County in the past year, the average likelihood of visiting the county due to the construction of the River Park is 81.1%. Accordingly, the adjusted total spending associated with the park is $384,890,871.5 \times 81.1\% = \$312,146,496.8$.

Table 9. Total spending by additional visitors who are attracted to visit the park.

	Total	Adjusted total*
Gas, automobile service, repair	35,171,970.2	28,524,467.8
Lodging (hotel, motel, condos, etc.)	88,982,978.5	72,165,195.6
Restaurants and bars s (food & beverages, etc.)	88,245,841.4	71,567,377.4
	35,803,802	29,036,883.4
Groceries take-out food/drinks, sundries	58,023,220.3	47,056,831.7
Shopping (souvenirs, gifts, clothing, etc.)	29,274,873.4	23,741,922.3
Outdoor recreation equipment purchase or rental (skiing, biking, etc.)	34,118,917.2	27,670,441.9
Others	15,269,268.5	12,383,376.8
Total	384,890,871.5	312,146,496.8

*Adjusted by the average of 81.1%.

3.3.3 Economic impact estimates of the River Park

The economic impact estimates for the River Park are presented in Table 10. The direct impact of the park is \$219,931,773, supporting 2,412 jobs. The total economic impact is estimated to be \$307,335,643, supporting 2,901 jobs.

Table 10. River Park economic impact estimates

	Direct Impact	Indirect & Induced Impacts	Total Economic Impact
Output (Sales)	\$219,931,773	\$87,403,869	\$307,335,643
Employment	2,412	489	2,901
Labor Income	\$70,759,040	\$23,031,809	\$93,790,849.11
State & Local Taxes	--	--	\$41,691,786.25

*The direct impact is less than the estimated \$312,146,497 due to the application of retail margins. Tax impact includes sales, personal income, property, and corporation net income taxes.

4. Conclusions

This study introduces an innovative methodology for estimating the increase in visitor numbers attributable to the development of the River Park. Based on a survey of 4,877 participants, the research team was able to predict a significant rise in visitation numbers. It is projected that the construction of the park would result in an additional 1,053,053 visits. This increase is not only a testament to the park's potential to attract visitors but also signifies its role in contributing to local and regional economies. The economic implications of these additional visits are substantial. The study estimates a total economic impact of \$307,335,643, reflecting the direct, indirect, and induced effects generated by the increased visitation. The total economic impact would support 2,901 jobs.

It should be noted that this study, while comprehensive in its estimation of visitation and economic impacts, does not account for several other significant benefits associated with the construction of the River Park. Among these, the potential increase in property values and the attraction of new residents to the area are particularly noteworthy. Research has consistently shown that proximity to well-maintained green spaces can substantially elevate property values. For instance, the value for homes with a nearby park can increase between 8% to 20% (Playworld, 2021). Moreover, urban green spaces/parks are known to attract individuals and families seeking a higher quality of life, leading to population growth and demographic shifts that can have lasting positive effects on local communities.

During the onsite survey, feedback from participants highlighted the appeal of the River Park and its surrounding amenities as a catalyst for relocation. Specifically, one respondent from North Carolina and another from Michigan shared their interest in moving to the area, underscoring the park's potential to attract new residents. This anecdotal evidence suggests that

the River Park, along with other local attractions, is perceived as a significant factor in individuals' decisions to relocate, reflecting the broader trend of green spaces enhancing the attractiveness of urban areas.

However, the quantification of these benefits requires a different methodological approach, often involving long-term real estate market analysis and demographic studies. This aspect falls outside the scope of the current study but represents an important area for future research. Understanding the full spectrum of benefits, including changes in property values and population dynamics, is crucial for a holistic assessment of the impact of urban parks like River Park. Further exploration into these areas could provide valuable insights for urban planners, real estate developers, and policymakers. It would help in crafting strategies that maximize the benefits of such projects, not only in terms of direct economic impact and visitor numbers but also in enhancing the overall attractiveness and livability of urban areas.

In conclusion, the River Park project stands as a significant contributor to the local economy and community well-being. The anticipated increase in visits and the associated economic impact highlight the importance of the park in promoting environmental sustainability, recreational opportunities, and economic vitality. This study underscores the need for strategic planning and investment in public amenities that enhance the quality of urban life and contribute to the long-term sustainability of the city.

5. References

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Appendix A: Survey questionnaire (initial survey)

Appendix B: Survey questionnaire (full-length survey)



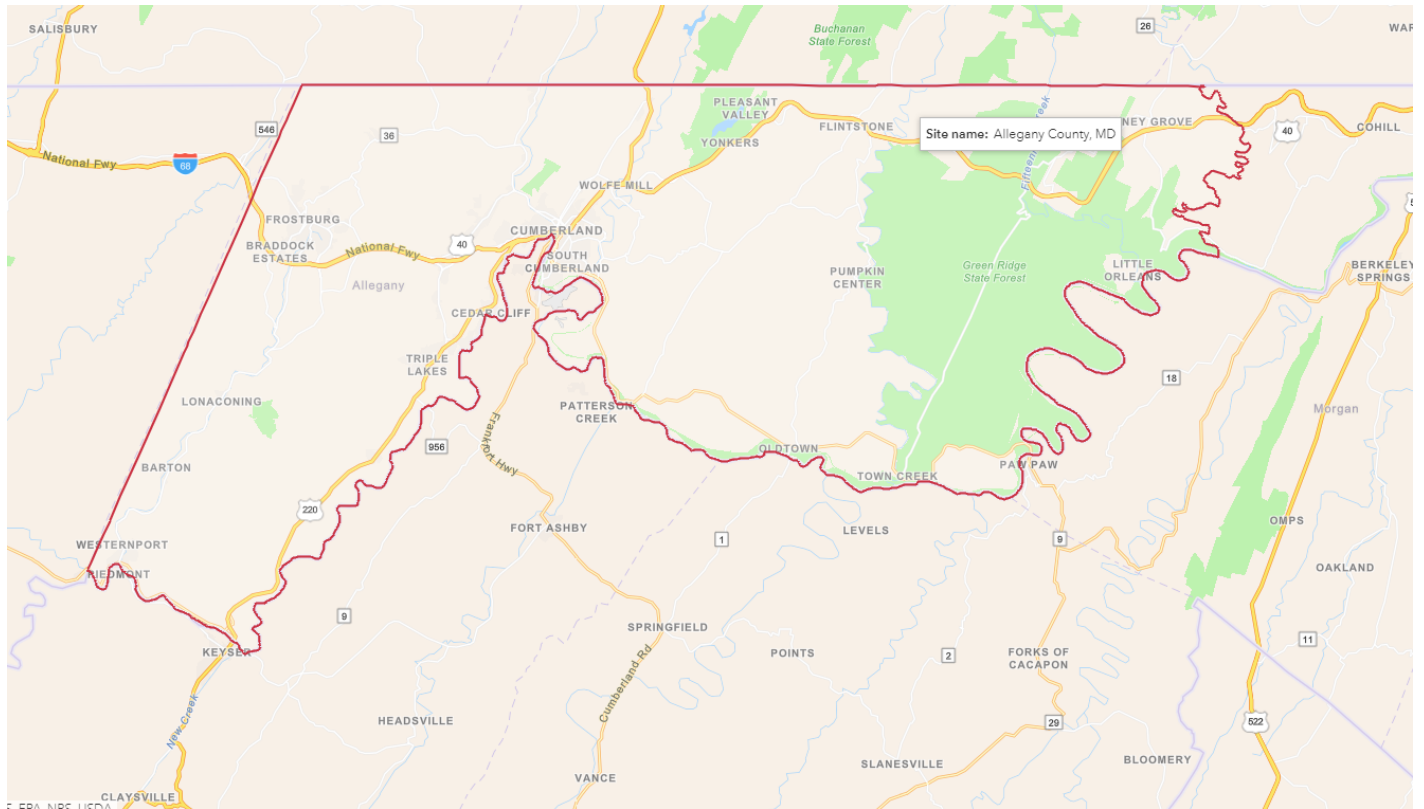
eligibility

The purpose of this short screening survey is to identify who have or have not visited any places in Allegany County, Maryland, from **December 1, 2022 to November 30, 2023.**

This short survey may take about 1 to 2 minutes to complete. **You will be offered \$1.00 for completing this screening survey.**

Thanks.

1. Below is a map (which is not interactive) that shows the Allegany County, Maryland. Please answer the next question to indicate if have visited any places in the county for leisure/recreation/vacation, visiting friends and/or relatives/family, business or other purposes in the past 12 months, from **December 1, 2022 to November 30, 2023.**



2. Have you visited Allegany County, Maryland during the previous 12 months (from Dec. 1, 2022 to Nov. 30, 2023)?

- Yes
- No

3. What factors impacted your decision to visit Allegany County, Maryland for your most recent trip? (Check all that apply)

- Leisure/recreation/vacation
- Visiting friends and/or relatives/family
- Business

Other (Please specify)

4. Are you planning to visit Allegany County in the next 12 months?

- Yes
 No
 Not sure yet

5. As you may know, the River Park at Canal Place is going to be constructed in downtown Cumberland, MD. Below is a map that shows the conceptual plan of the River Park. The proposed features of the River Park include:

- Whitewater kayaking, rafting
- 3.2 mile river loop trail and trail connections
- Multiple water accesses/spectating areas
- Tri-state overlook
- New and improved parking areas
- Fish passage accessibility
- Murals

The following question is related to this proposed River Park.



If you currently have no plans or are unsure about visiting the county in the next 12 months, please consider this scenario: River Park will be open to the public after its construction within this timeframe.

How likely are you to visit the park? Is it likely to be a primary draw for you, or just one among several attractions in the county? Adjust the slider below on a scale from 0 (River Park is not a factor in visiting the county) to 100 (River Park is the primary reason for visiting the county).



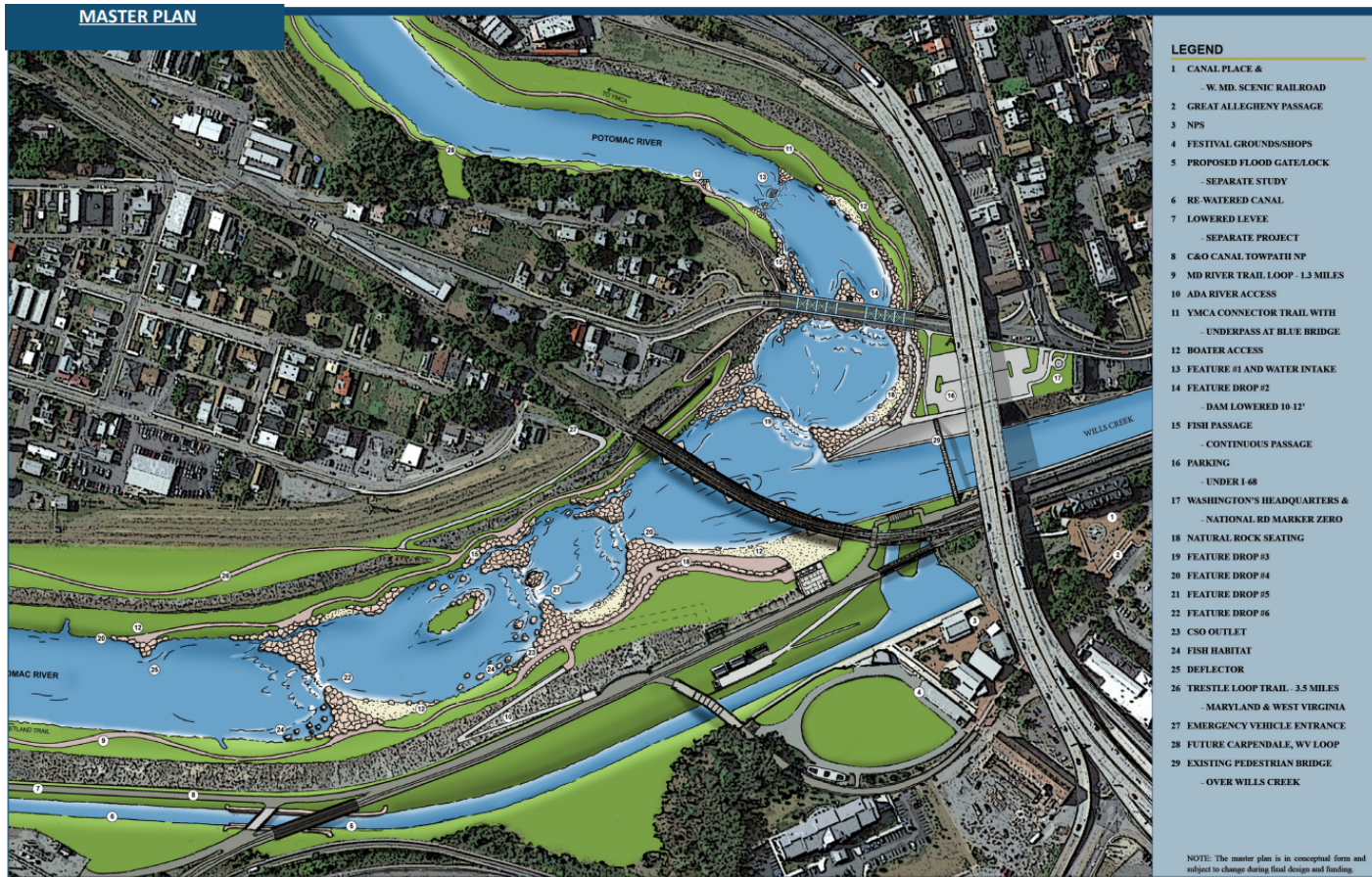
5. Are you planning to visit Allegany County in the next 12 months?

- Yes
- No
- Not sure yet

5. As you may know, the River Park at Canal Place is going to be constructed in downtown Cumberland, MD. Below is a map that shows the conceptual plan of the River Park. The proposed features of the River Park include:

- Whitewater kayaking, rafting
- 3.2 mile river loop trail and trail connections
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- Murals

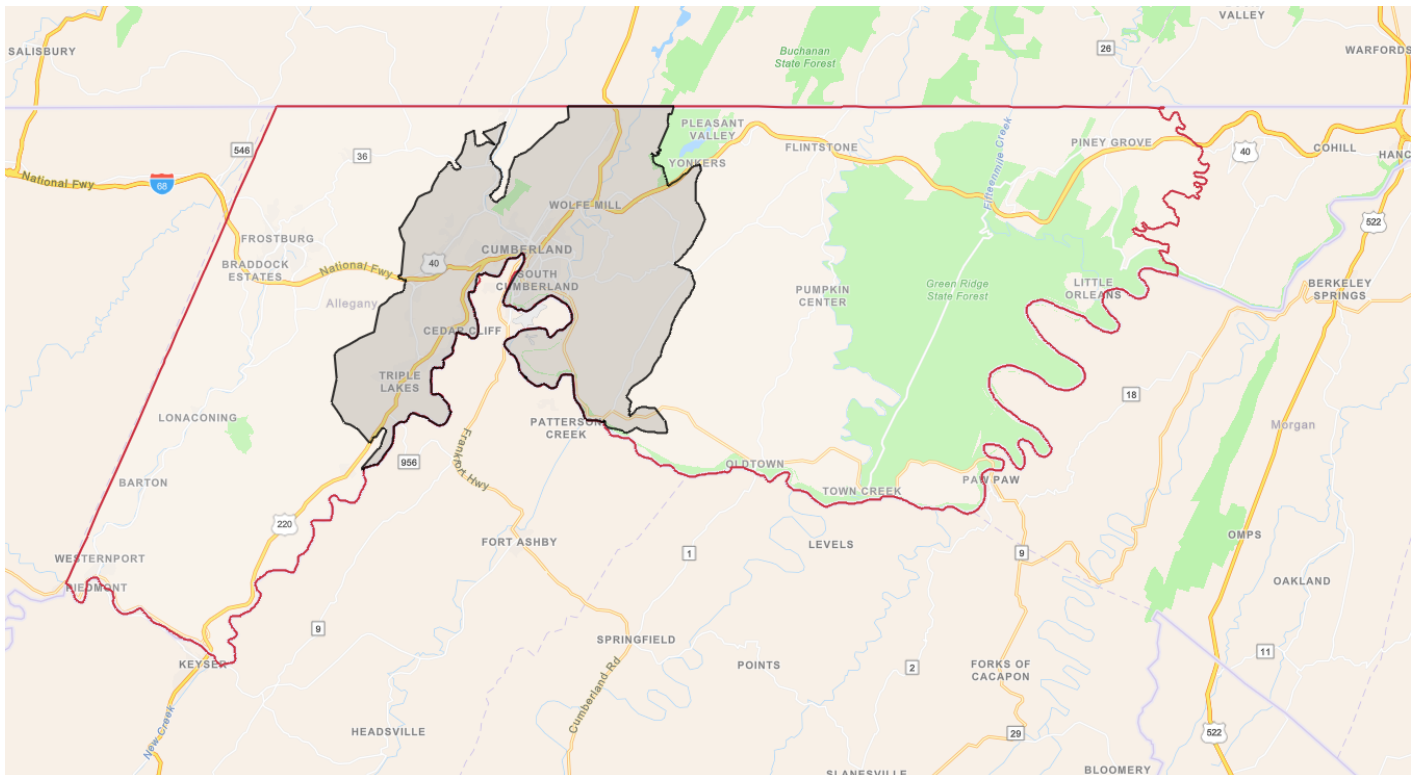
The following question is related to this proposed River Park.



If you currently have no plans or are unsure about visiting the county in the next 12 months, please consider this scenario: River Park will be open to the public after its construction within this timeframe. How likely are you to visit the park? Is it likely to be a primary draw for you, or just one among several attractions in the county? Adjust the slider below on a scale from 0 (River Park is not a factor in visiting the county) to 100 (River Park is the primary reason for visiting the county).



6. The shaded area below refers to Cumberland in Allegany County, MD. Cumberland is famous for the Western Maryland Scenic Railroad, C&O Canal National Historical Park, National Road, George Washington's Headquarters, Rocky Gap State Park, Allegany Museum, The Great Allegheny Passage, and more.



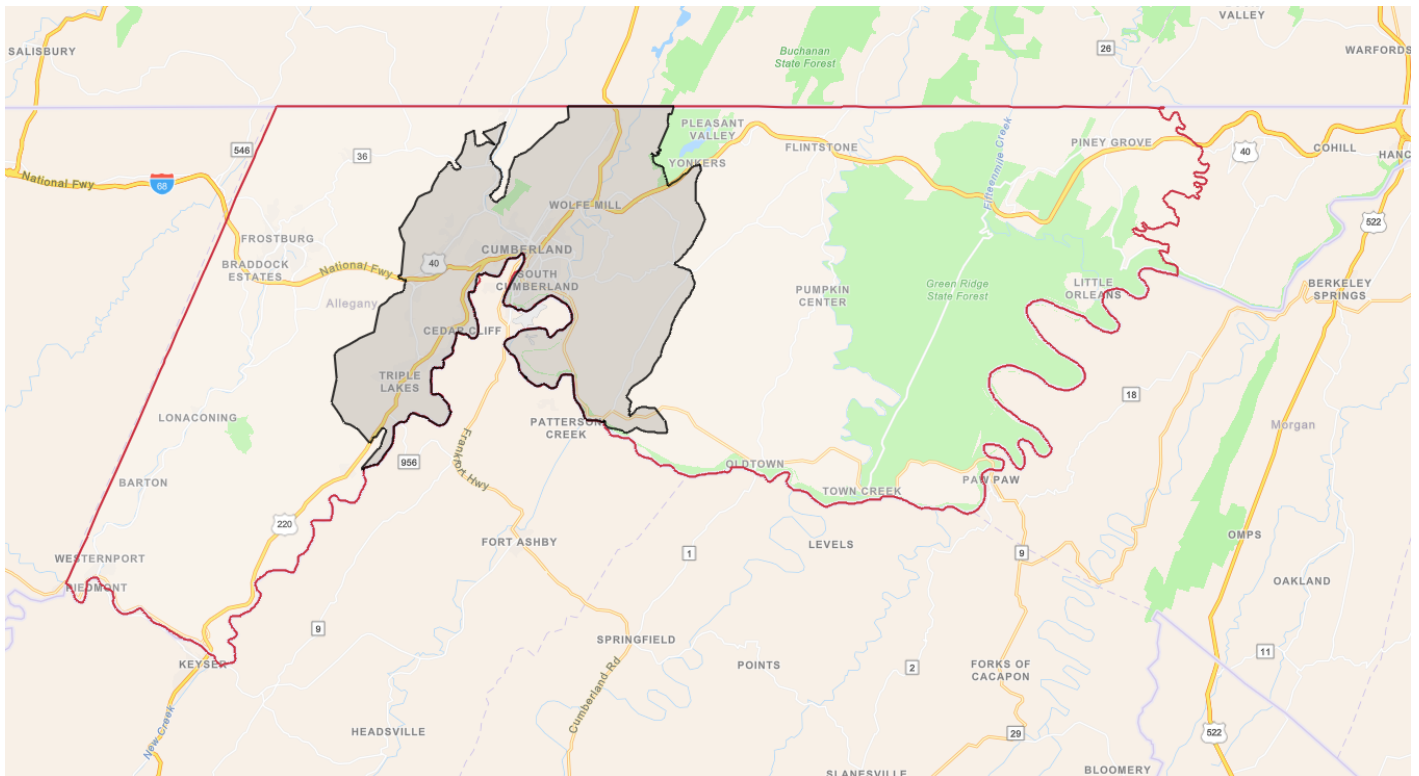
Have you visited Cumberland, MD during the previous 12 months (from Dec. 1, 2022 to Nov 30, 2023)?

- Yes
- No

7. What factors impacted your decision to visit Cumberland, Maryland for your most recent trip? (Check all that apply)

- Leisure/recreation/vacation
- Visit friends and/or relatives/family
- Business
- Other (please specify)

6. The shaded area below refers to Cumberland in Allegany County, MD. Cumberland is famous for the Western Maryland Scenic Railroad, C&O Canal National Historical Park, National Road, George Washington's Headquarters, Rocky Gap State Park, Allegany Museum, The Great Allegheny Passage, and more.



Have you visited Cumberland, MD during the previous 12 months
(from Dec. 1, 2022 to Nov 30, 2023)?

- Yes
 No

7. What factors impacted your decision to visit Cumberland,
Maryland for your most recent trip? (Check all that apply)

- Leisure/recreation/vacation
 Visit friends and/or relatives/family
 Business
 Other (please specify)

8. Are you planning to visit Cumberland in the next 12 months?

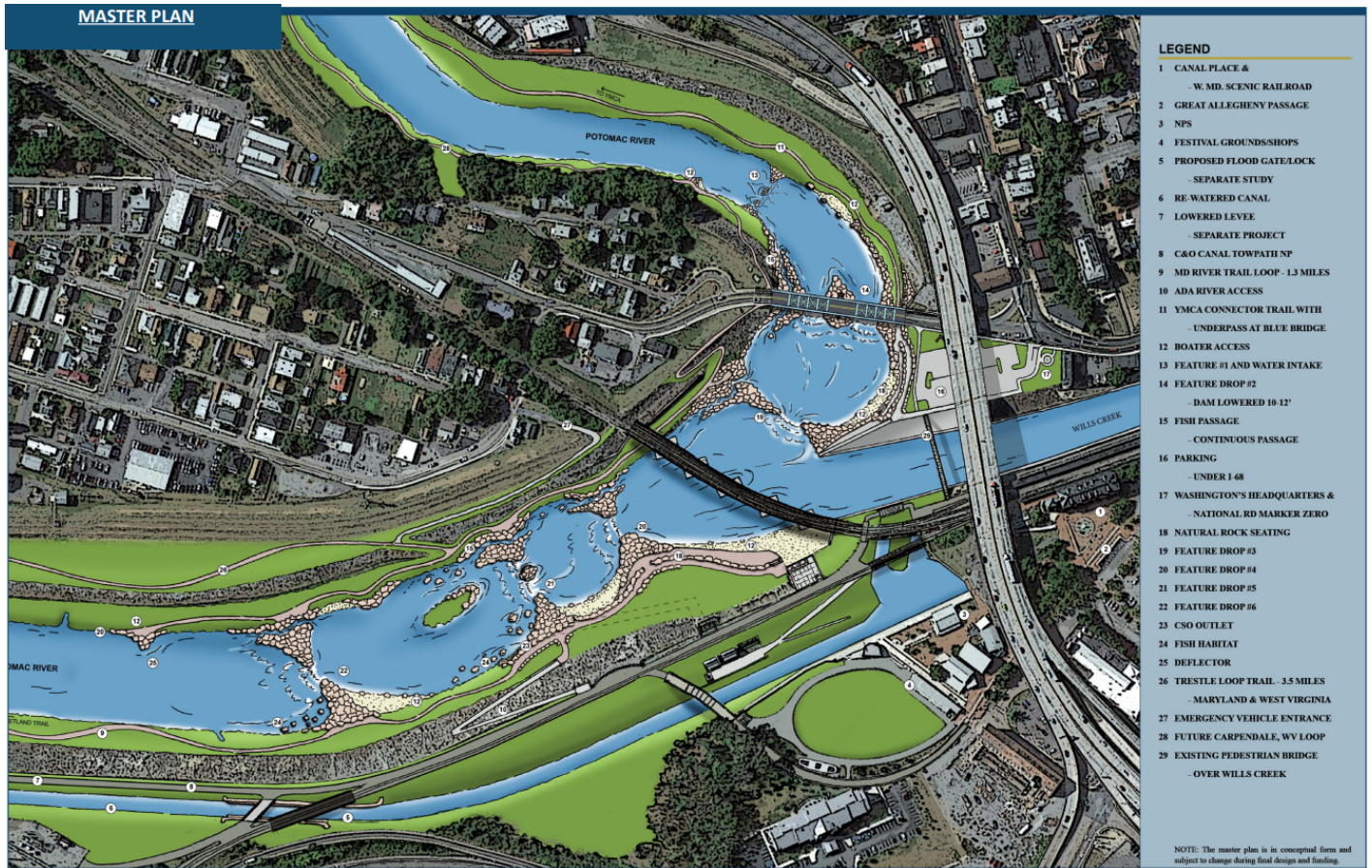
- Yes
 No
 Not sure yet

For those who are not planning to visit Cumberland

9. As you may know, the River Park at Canal Place is going to be constructed in downtown Cumberland, MD. Below is a map that shows the conceptual plan of the River Park. The proposed features of the River Park include:

- Whitewater kayaking, rafting
- 3.2 mile river loop trail and trail connections
- Multiple water accesses/spectating areas
- Tri-state overlook
- New and improved parking areas
- Fish passage accessibility
- Murals

The following question is related to this proposed River Park.



If you currently have no plans or are unsure about visiting Cumberland in the next 12 months, please consider this scenario: River Park will be open to the public after its construction within this timeframe. How likely are you to visit the park? Is it likely to be a primary draw for you, or just one among several attractions in Cumberland? Adjust the slider below on a scale from 0 (River Park is not a factor in visiting Cumberland) to 100 (River Park is the primary reason for visiting Cumberland).

0 10 20 30 40 50 60 70 80 90 100



Cover Letter

Cover Letter

Dear Participant:

You recently participated in a short screening survey for a project titled 'River Park Visitor Profile and Tourism Economic Impact Study' in Cumberland, Maryland. You are invited again to participate in this follow-up survey that only targets those who met the screening criteria: at least 18 years old and have visited at least once to Cumberland, MD in the previous 12 months (from **December 1, 2022** to **November 30, 2023**).

This project is being conducted by the **Canal Place Preservation and Development Authority (CPPDA)** with support from a WVU team led by Dr. Jinyang Deng, a professor with WVU's School of Natural Resources. Your participation in this project is greatly appreciated and will take approximately 5 minutes. You will be offered \$3 as a gesture of thanks for completing this survey.

The purpose of this study is to know about the tourism market for Cumberland and to estimate the economic impacts of a River Park to be constructed in the area. Your participation in this survey is voluntary and you can quit at any time. However, you can help us very much by taking a few minutes to respond. You do not have to answer all of the questions, but any information you provide will contribute to the project's success.

All information collected will be kept strictly confidential. Information you provide is anonymous and only summaries will be reported in which an individual's answers will not be identified.

This survey was reviewed and approved by WVU Institutional Review Board (IRB) and **a WVU IRB acknowledgement is on file.** If you have any further questions, please feel free to contact Dr. Jinyang Deng (304-293-6818) and/or by email (jinyang.deng@mail.wvu.edu). Your contribution to this study is greatly appreciated and will be a great benefit to the city of Cumberland, MD.

Sincerely,

Dr. Jinyang Deng
West Virginia University

Consent

1. You will be offered \$3 for completing this survey. If you agree to participate in this survey, please check "Yes" below:

- Yes
 No

Background Information

Section 1: Background Information

2. Please check the seasons in which you visited Cumberland, MD in the previous 12 months (**December 1, 2022 - November 30, 2023**) (check all that apply)

- Winter:** December 1, 2022 - February 28, 2023
 Spring: March 1, 2023 - May 31, 2023

Summer: June 1, 2023 - August 31, 2023

Fall: September 1, 2023 - November 30, 2023

3. What state do you currently reside in?

- Kentucky
- Maryland
- New York
- Ohio
- Pennsylvania
- Virginia
- Washington DC
- West Virginia
- Other (please specify)

4. Please choose from the following list of places you have visited in Cumberland in the previous 12 months (click to choose all that apply). If the places you visited are not on the list, please write down in the blank space provided.

- | | |
|--|--|
| <input type="checkbox"/> Allegany Museum | <input type="checkbox"/> Paw Paw Tunnel |
| <input type="checkbox"/> C&O Canal National Historical Park and Visitors Museum | <input type="checkbox"/> Rocky Gap Casino Resort |
| <input type="checkbox"/> C&O Canal Towpath | <input type="checkbox"/> Rocky State Park |
| <input type="checkbox"/> Cumberland Visitor Center (located in the Western Maryland Railway station) | <input type="checkbox"/> Washington's Headquarters |

DelFest Western Maryland Rail Trail Emmanuel Episcopal Church
Great Allegheny Passage Western Maryland Scenic Railroad**Others (please specify)** National RD Marker Zero

5. What activities did you participate in **during all trips to Cumberland** in the past 12 months (**from December 1, 2022 to November 30, 2023**)? (check all that apply)

- Birding/wildlife viewing
- Canoeing/kayaking/rafting
- Climbing
- Cycling/biking
- Dining locally
- Dog walking
- Fishing
- Hiking/walking
- History/cultural interest
- Hunting
- Interpretive programs/exhibits
- Mountain biking
- Photography
- Picnicking/cooking-out
- Playground

- Rail biking
- Scenic driving
- Scenic railroad train ride
- Shopping
- Sightseeing
- Special events
- Swimming
- Visit to a museum or attraction
- Visit to an art gallery
- Visit to winery, brewery, distillery
- Other (please specify)

Section 2: Trip Characteristics

Section 2: Trip Characteristics

7. Please check where appropriate to indicate your reason(s) for visiting Cumberland **during your most recent visit.**

- Leisure/holiday/vacation
- Visiting friends and/or relatives/family
- Business
- Others (please specify)

8. **Including your most recent visit**, how many times have you visited Cumberland in the previous 12 months (**December 1, 2022-November 30, 2023**)? (Numbers only).

9. **Including yourself**, how many people were traveling with you **during your most recent trip** to the city? (number only)

10. Have you stayed overnight during your most recent trip to the city?

- Yes
 No

11. During your most recent trip to the city, how many nights have you stayed in the city? (**number only**)

12. Please indicate your main type(s) of accommodation that you stayed at during your most recent trip to the city.

- Airbnb
- Bed & Breakfast
- Camping/tent
- Friends and/or relatives
- Hotel/motel/inn
- Rented house/apartment/VRBO
- RV
- Second home
- Timeshare
- Other (please specify)

13. During your most recent trip to the city, please indicate your travel composition:

- Alone
- Friends
- Relatives/family
- Both friends and relatives/family

Other (please specify)

14. Please move the slider below to indicate how much of your current visit to the city is influenced by recommendations from others.



15. Please indicate how likely you will recommend Cumberland to others?

	Very Unlikely	Unlikely	Neutral	Likely	Very Likely
1. Will recommend to family/others	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Will speak positively about the city	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Will share my experience on social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. Please indicate how likely you will revisit Cumberland in the

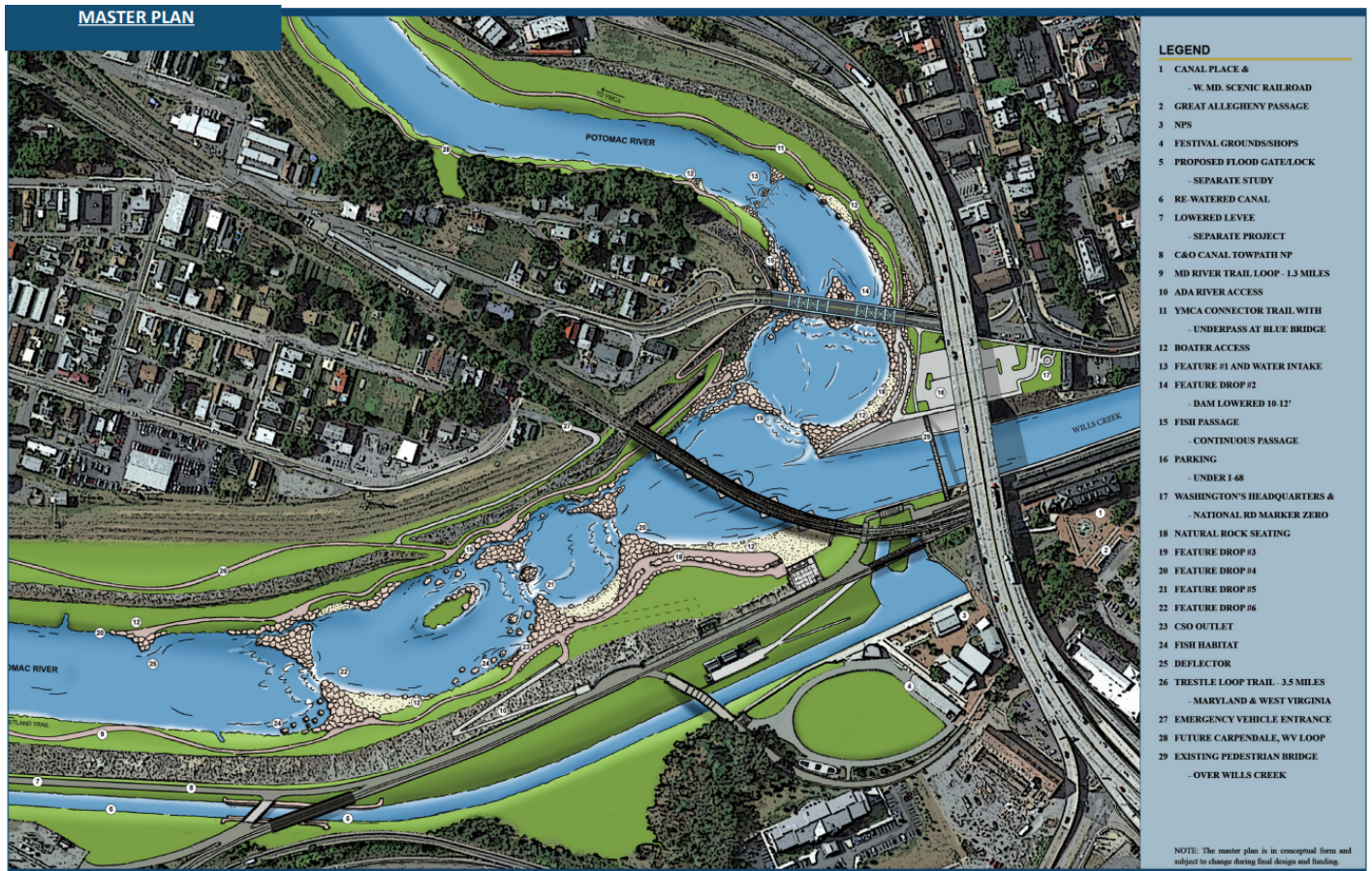
following 12 months?

	Very Unlikely	Unlikely	Neutral	Likely	Very Likely
1. Will revisit again in the following 12 months	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

17. As you may know, the River Park at Canal Place is going to be constructed in downtown Cumberland, MD. Below is a map that shows the conceptual plan of the River Park. The proposed features of the River Park include:

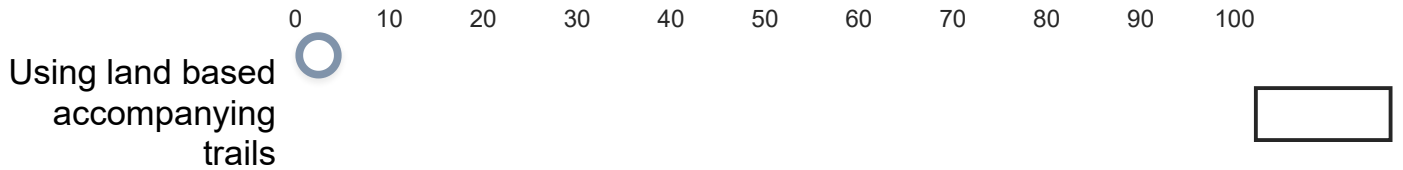
- Whitewater kayaking, rafting
- 3.2 mile river loop trail and trail connections
- Multiple water accesses/spectating areas
- Tri-state overlook
- New and improved parking areas
- Fish passage accessibility
- Murals

The following questions are related to this proposed River Park.



18. If you plan to revisit Cumberland, how likely will you participate in the following activities related to the River Park?

	0	10	20	30	40	50	60	70	80	90	100	
Kayaking/rafting	<input checked="" type="radio"/>											<input type="text"/>
Spectating	<input type="radio"/>											<input type="text"/>
Sightseeing	<input type="radio"/>											<input type="text"/>
Taking photos	<input type="radio"/>											<input type="text"/>



19. Please move the slider below to indicate how likely you will recommend the proposed River Park to others.



SECTION 3: Perceptions of the River Park

Section 3: Perceptions of the River Park

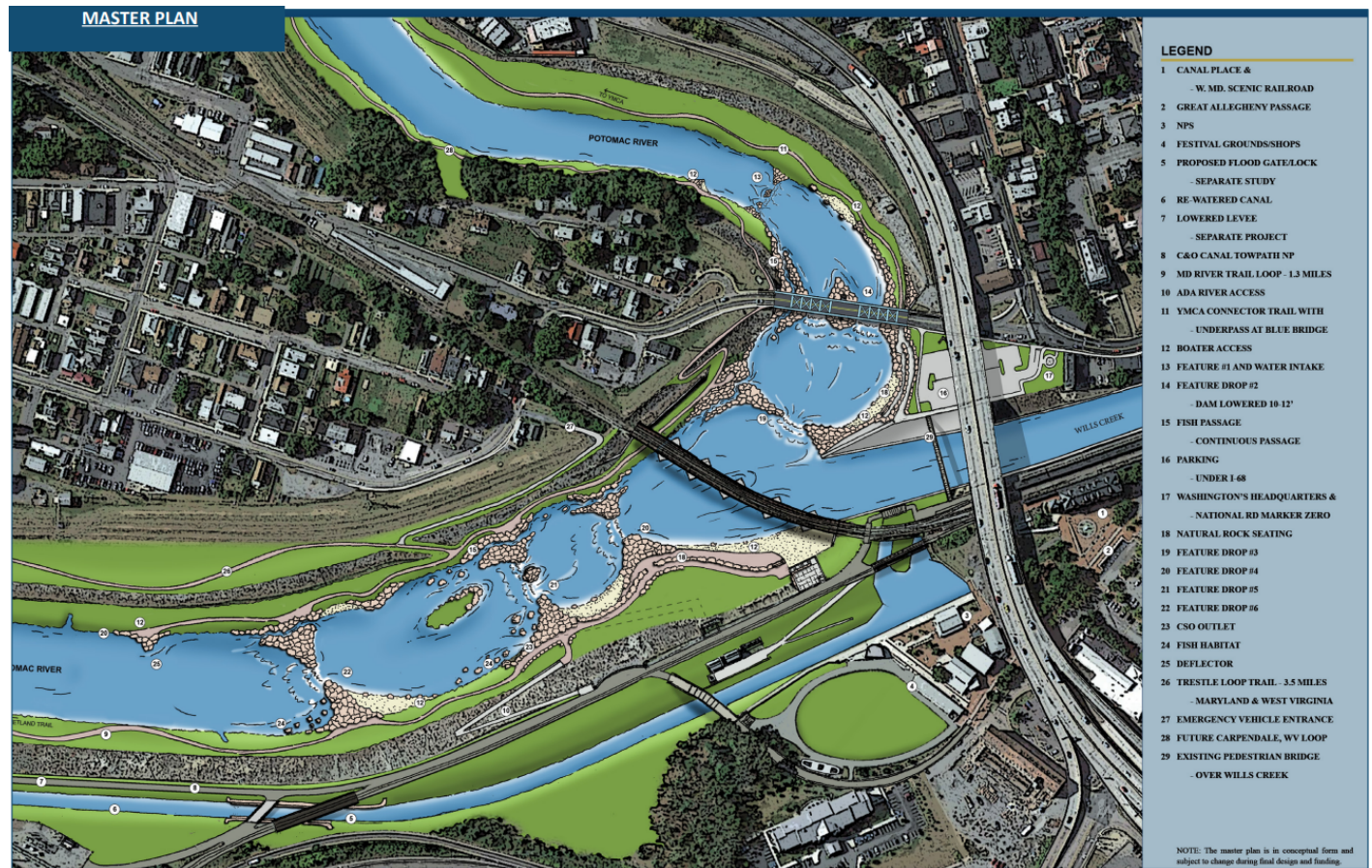
20. As you may know, the River Park at Canal Place is going to be constructed in downtown Cumberland, MD. Below is a map that shows the conceptual plan of the River Park. The proposed features of the River Park include:

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-Fish passage accessibility

-Murals

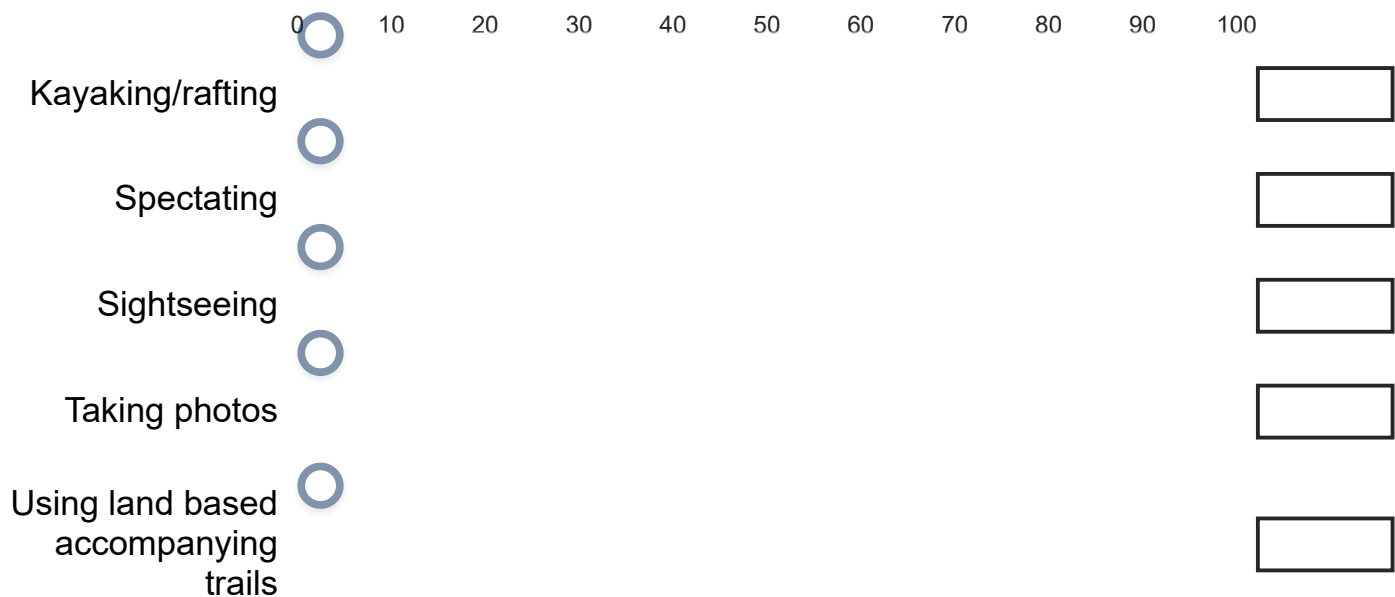
The following questions are related to this proposed River Park.



If you currently have no plans or are unsure about visiting Cumberland in the next 12 months, please consider this scenario: River Park will be open to the public after its construction within this timeframe. How likely are you to visit the park? Is it likely to be a primary draw for you, or just one among several attractions in the city? Adjust the slider below on a scale from 0 (River Park is not a factor in visiting Cumberland) to 100 (River Park is the primary reason for visiting Cumberland).



21. If you plan to visit Cumberland again, how likely will you participate in the following activities related to the River Park?



22. Please move the slider below to indicate how likely you will recommend the proposed River Park to others.



SECTION 4: Your Spending in the Cumberland

Section 4: Your Spending in Cumberland, MD

23. To better understand the economic impact of tourism to the city, we are interested in finding out the approximate amount of money you have spent in the city (please give your best estimate of dollars spent for **the entire group during the most recent trip in the city. If you are not sure the total for the entire group, you can simply multiply your spending by the number of the group to get the total spending for the entire group**).

* Gasoline, automobile service, repair

* Lodging (hotel, motel, condos, etc.)

* Restaurants and bars (food & beverages, etc.)

* Groceries, take-out food/drinks, sundries

* Shopping (souvenirs, gifts, clothing, etc.)

* Outdoor recreation equipment purchase or rental (skiing, biking, etc.)

* Admissions and fees (seasonal pass, tickets for train rides, events, theaters, activities,

etc.)

* Others

SECTION 5: Socio-demographics

Section 5: Socio-demographics

24. Gender (person who fills this questionnaire)

- Female
- Male
- Non-binary
- Other
- Prefer not to answer

25. Including yourself, how many females and males in your group for your most recent trip to the city?

Females

Males

Non-binary

Other

Prefer not to answer

26. What is your age?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- Prefer not to tell

27. What is the highest level of education you have completed?

- Less than high school degree
- High school degree or equivalent
- Some college
- Undergraduate or post-secondary degree
- Graduate school degree

28. What was your approximate household income from all sources, before taxes, in **2022**?

- Less than \$20,000
- \$20,001 to \$40,000
- \$40,001 to \$60,000
- \$60,001 to \$80,000
- \$80,001 to \$100,000
- \$100,001 to \$150,000
- \$150,001 to \$200,000
- \$200,001 to \$250,000
- \$250,001 to \$300,000
- \$300,001 +
- Prefer not to tell

29. What is your zip code

30. Do you have any other comments on your experience in the city?



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