

LOWER SUSQUEHANNA HERITAGE GREENWAY MAKES AN IMPACT

December 2020



ABOUT LOWER SUSQUEHANNA HERITAGE GREENWAY



\$110.7 MILLION
in economic impact

1,579 JOBS
supported and sustained

\$14.9 MILLION
in state and local tax revenue

BIRTHPLACE OF THE BAY

HISTORIC RIVERFRONT TOWNS – HAVRE DE GRACE, PERRYVILLE, AND PORT DEPOSIT

NATIONAL TRAILS CONVERGE – CAPTAIN JOHN SMITH CHESAPEAKE NATIONAL HISTORIC TRAIL, WASHINGTON-ROCHAMBEAU REVOLUTIONARY ROUTE, AND STAR-SPANGLED BANNER NATIONAL HISTORIC TRAIL

IMPORTANT WAR STORIES – REVOLUTIONARY, 1812, AND CIVIL

TRANSPORTATION STORIES – WATER, RAIL, AND HIGHWAY

FAMOUS AMERICANS – HOME TO JOHN RODGERS, JACOB TOME, AND JOHN O'NEILL

TRAIL NETWORKS – HIKING, BIKING, AND WATER

SIGNIFICANT ENVIRONMENTAL RESOURCES – SUSQUEHANNA RIVER, SUSQUEHANNA FLATS, AND PORT DEPOSIT GRANITE

HISTORIC VISITORS – CAPTAIN JOHN SMITH, WASHINGTON-ROCHAMBEAU, AND LAFAYETTE

MAJOR ROADWAY CORRIDORS – ROUTE 1, I-95, AND ROUTE 40

RIVER CROSSINGS – CONOWINGO DAM, I-95, AND ROUTE 40

HISTORIC SCHOOLS – TOME, HOSANNA, AND HAVRE DE GRACE COLORED SCHOOL

HISTORIC MILLS – ROCK RUN MILL, WILSON'S MILL, AND STAFFORD MILL

VISITOR CENTERS – CONOWINGO, HAVRE DE GRACE, AND PORT DEPOSIT

RAIL SERVICES – AMTRAK, MARC, AND CSX

ABOUT LOWER SUSQUEHANNA HERITAGE GREENWAY

THE MISSION OF LOWER SUSQUEHANNA HERITAGE GREENWAY

The Lower Susquehanna Heritage Greenway (LSHG) is a non-profit organization whose mission is to stimulate local economic activity by developing a linkage between the area's natural, historical, and cultural resources. This linkage is a series of land and water recreational trails that weave the past into the future while promoting an understanding and appreciation for the character of this region.

Envisioned by government and private agencies in 1992 as an opportunity to encourage heritage tourism, the Lower Susquehanna Heritage Greenway (LSHG) tells the story of an area rich in historical and cultural resources, set in an unspoiled natural environment with unique scenic beauty. The LSHG contains key elements related to the country's early history and the heritage that has been preserved in the local culture. With over 50 miles of waterfront vistas and indigenous wildlife, the natural beauty of the area is unsurpassed.

Centered around the Susquehanna River and the birthplace of the Chesapeake Bay, the LSHG links three waterfront communities – Port Deposit, Perryville, and Havre de Grace through a trail network that serves as a public-private catalyst to develop a robust business economy. The developing trail network includes more than 23 miles of land trails in Harford and Cecil counties. The Lower Susquehanna Scenic Byway also links the waterfront communities, traveling 33 miles on local and state roadways, and the LSHG serves as the gateway to three National Historic Trails, Captain John Smith Chesapeake, the Star-Spangled Banner, and Washington-Rochambeau Revolutionary Route.

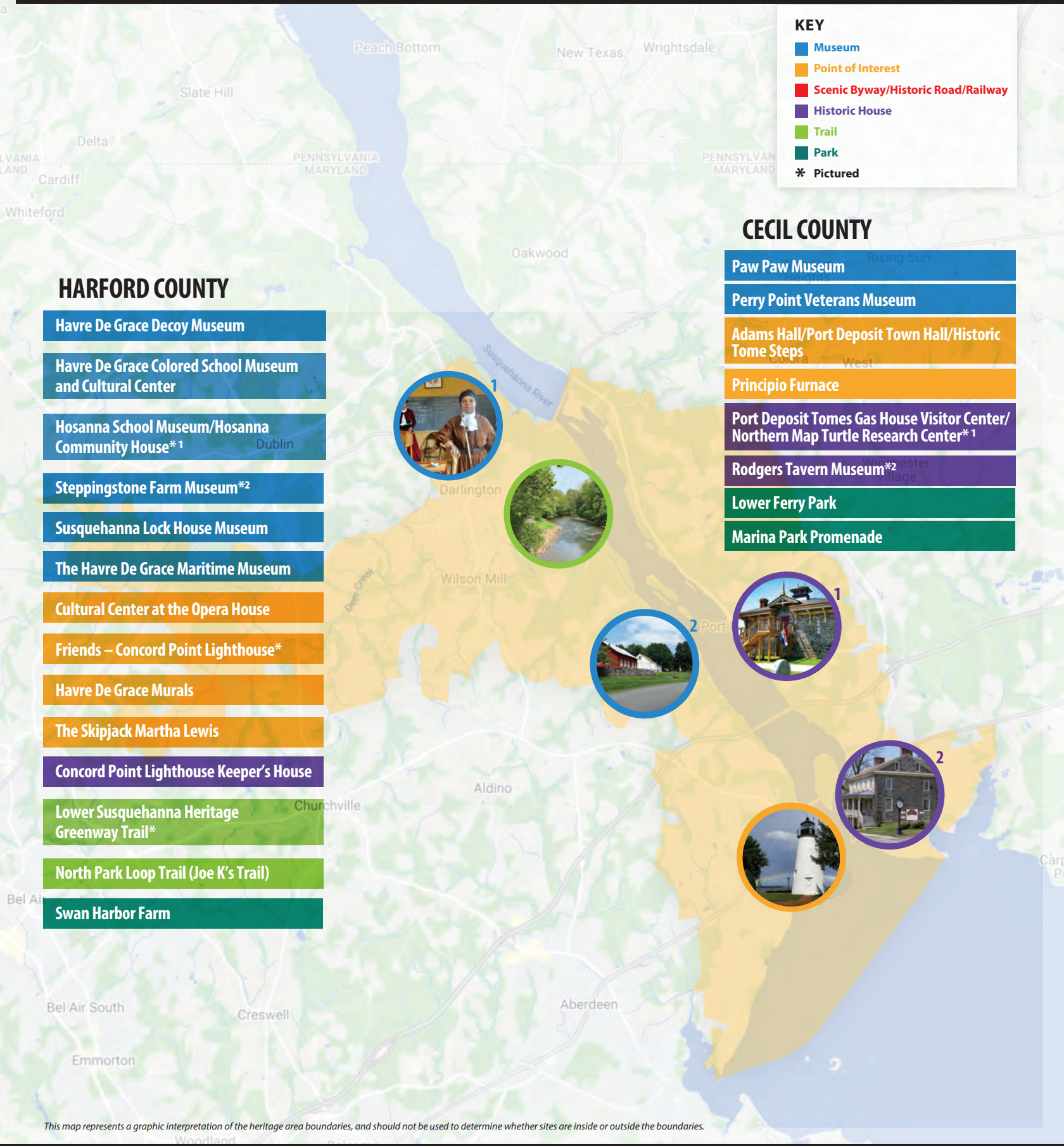
With its many miles of undeveloped shoreline, stretches of this upper Bay region look as though they have been relatively undisturbed for hundreds of years. Public water access sites invite exploration of these scenic segments by watercraft, while land trails provide hiking and biking opportunities where water access can be challenging. The trails also offer access to unique wildlife viewing areas. Visitors travel from all over the world to photograph bald eagles feeding in the waters below the Conowingo Dam.

The rich history of the area and its role in America's story can be experienced in Susquehanna State Park and the river towns. Susquehanna State Park offers camping and picnicking opportunities while hosting Steppingstone Farm Museum and several historic structures, including the Rock Run Mill. The Mill is also home to an exhibit of the Bald Friar petroglyphs.

The LSHG's three waterfront communities showcase the area's river-centric culture. With marinas, riverfront dining, festivals, museums, promenades, and iconic bridges, the story of the Susquehanna River and the Bay are waiting to be experienced. In each town, museums offer opportunities to experience local history. Connecting the past to the present, country to town, people to nature, preserving the heritage for generations to come.

Working with governments, museums, cultural sites, and civic and business organizations, the LSHG supports heritage tourism, conservation, and recreational efforts that promote the local economy, create jobs, and build stronger communities.

LOWER SUSQUEHANNA KEY SITES SPAN ACROSS HARFORD AND CECIL COUNTIES



KEY

- Museum
- Point of Interest
- Scenic Byway/Historic Road/Railway
- Historic House
- Trail
- Park
- * Pictured

HARFORD COUNTY

- Havre De Grace Decoy Museum
- Havre De Grace Colored School Museum and Cultural Center
- Hosanna School Museum/Hosanna Community House* 1 Dublin
- Steppingstone Farm Museum*2
- Susquehanna Lock House Museum
- The Havre De Grace Maritime Museum
- Cultural Center at the Opera House
- Friends – Concord Point Lighthouse*
- Havre De Grace Murals
- The Skipjack Martha Lewis
- Concord Point Lighthouse Keeper's House
- Lower Susquehanna Heritage Greenway Trail*
- North Park Loop Trail (Joe K's Trail)
- Swan Harbor Farm

CECIL COUNTY

- Paw Paw Museum Rising Sun
- Perry Point Veterans Museum
- Adams Hall/Port Deposit Town Hall/Historic Tome Steps West
- Principio Furnace
- Port Deposit Tomes Gas House Visitor Center/Northern Map Turtle Research Center* 1 West
- Rodgers Tavern Museum*2 West
- Lower Ferry Park West
- Marina Park Promenade West



This map represents a graphic interpretation of the heritage area boundaries, and should not be used to determine whether sites are inside or outside the boundaries.

ECONOMIC IMPACT OF LOWER SUSQUEHANNA

ECONOMIC CONTRIBUTION

The economic impact of the Lower Susquehanna Heritage Greenway is **\$111.7 million** annually. This economic impact consists of tourism driven by the presence of the Lower Susquehanna Heritage Greenway (\$110.7 million), and the operations and grantmaking activities of the heritage area in collaboration with MHAA (\$.98 million).

One of Lower Susquehanna Heritage Greenway's strengths is its existing and growing trail system. The vast trail system in their footprint attracts tourists from near and far. At the time of publication, trail use data on the number of users was not available for inclusion in the economic impact analysis. It is expected that when data on the number of trail users is obtained through independent trail studies and included in the heritage area's total visitor numbers, the economic impact will grow significantly.

	Operations and Grantmaking	Heritage Tourism	TOTAL Impact
Direct	\$570,456	\$64,267,190	\$64,837,646
Indirect	\$181,641	\$22,435,323	\$22,616,964
Induced	\$226,319	\$24,050,967	\$24,277,286
Total	\$978,416	\$110,753,480	\$111,731,896

Source: Parker Phillips using IMPLAN

EMPLOYMENT CONTRIBUTION

The employment impact of the Lower Susquehanna Heritage Greenway includes **1,579 jobs** supported and sustained. This economic impact is driven by the presence of Lower Susquehanna Heritage Greenway's operations and grant making activities and tourism.

	Operations and Grantmaking	Heritage Tourism	TOTAL Employment
Direct	7	1,115	1,122
Indirect	2	216	218
Induced	2	237	239
Total	11	1,568	1,579

Source: Parker Phillips using IMPLAN

ECONOMIC IMPACT OF LOWER SUSQUEHANNA

STATE AND LOCAL TAX CONTRIBUTION

The total state and local taxes generated as a result of the Lower Susquehanna Heritage Greenway based upon operations, grantmaking, and tourism totals **\$14.9 million**.



Source: Parker Philips using IMPLAN

ABOUT THE STUDY

In June 2019, Maryland Heritage Areas Authority (MHAA) engaged Parker Philips Inc. to measure the economic contribution of its 13 heritage areas. The goal of this analysis is to provide a complete assessment of the total economic, employment, and state and local tax impact of heritage tourism. The impact presented in this analysis is broken down into three categories: direct impact, indirect impact and induced impact. The indirect and induced impacts are commonly referred to as the “multiplier effect.”

The primary tool used in the performance of this study is the I-O model and dataset developed by IMPLAN Group LLC. Financial data used in this study was obtained from MHAA, individual heritage areas, visitor surveys, and Maryland tourism data. It included the following data points: operational expenditures, capital expenditures, grants awarded, and payroll and benefits for employees for FY 19. Primary surveys were conducted with heritage area visitors across the state in the heritage area (day and overnight and local and non-local visitors).

LOWER SUSQUEHANNA HERITAGE GREENWAY

WHAT IS A MARYLAND HERITAGE AREA?

Heritage Areas are locally designated and state certified regions where public and private partners make commitments to preserving and enhancing historical, cultural and natural resources for sustainable economic development through heritage tourism. The program is intended as a partnership between state agencies and local communities to optimize the appeal of the state's distinctive regions as heritage tourism experiences. At the same time, heritage areas focus community attention on under-appreciated aspects of history, culture, and natural areas to foster a stronger sense of regional pride.

RIVER SWEEP

LSHG's signature environmental protection and education event, "River Sweep," now in its 20th year, has removed over 114.5 tons of debris from local waterways. Thousands of people have participated in the day-long event at nine locations throughout the heritage area's footprint. Hosted to celebrate Earth Day, volunteers clean up the local watershed in Harford and Cecil Counties. River Sweep participants spend the morning removing trash and other debris from the Upper Bay region, including the Chesapeake Bay, Susquehanna River, North East River, and tributaries. This event builds investment in the heritage area by encouraging environmental stewardship. The volunteers feel a sense of ownership and pride in community while making a difference in the overall health of the environment. It shows volunteers the importance of responsible use of the land and waterways and protecting the natural environment for enjoyment by future generations.

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“LSHG HAS FOSTERED RELATIONSHIPS BETWEEN JURISDICTIONS AND MUNICIPALITIES THAT SHARE A COMMON GOAL TO ATTRACT MORE VISITORS TO OUR COMMUNITIES. LOCAL BUSINESSES, LOCAL MUSEUMS, AND TOURISM OFFICES ARE VERY SUPPORTIVE OF THE HERITAGE AREA AND WORK COLLABORATIVELY TO PROMOTE HERITAGE TOURISM. STRONG COMMUNICATION AND COLLABORATION ARE NECESSARY TO GO AFTER COMMON GOALS AND TO RE-ESTABLISH THE VISION OF WHAT WE COLLECTIVELY WANT FOR THE AREA.”

– DIANNE KLAIR
CITY PLANNER FOR THE CITY OF HAVRE DE GRACE

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