



# BEACH TO BAY HERITAGE AREA MAKES AN IMPACT

December 2020

*Parker Philips*  
assess. analyze. assist!

 **BEACH  
to BAY**  
HERITAGE AREA

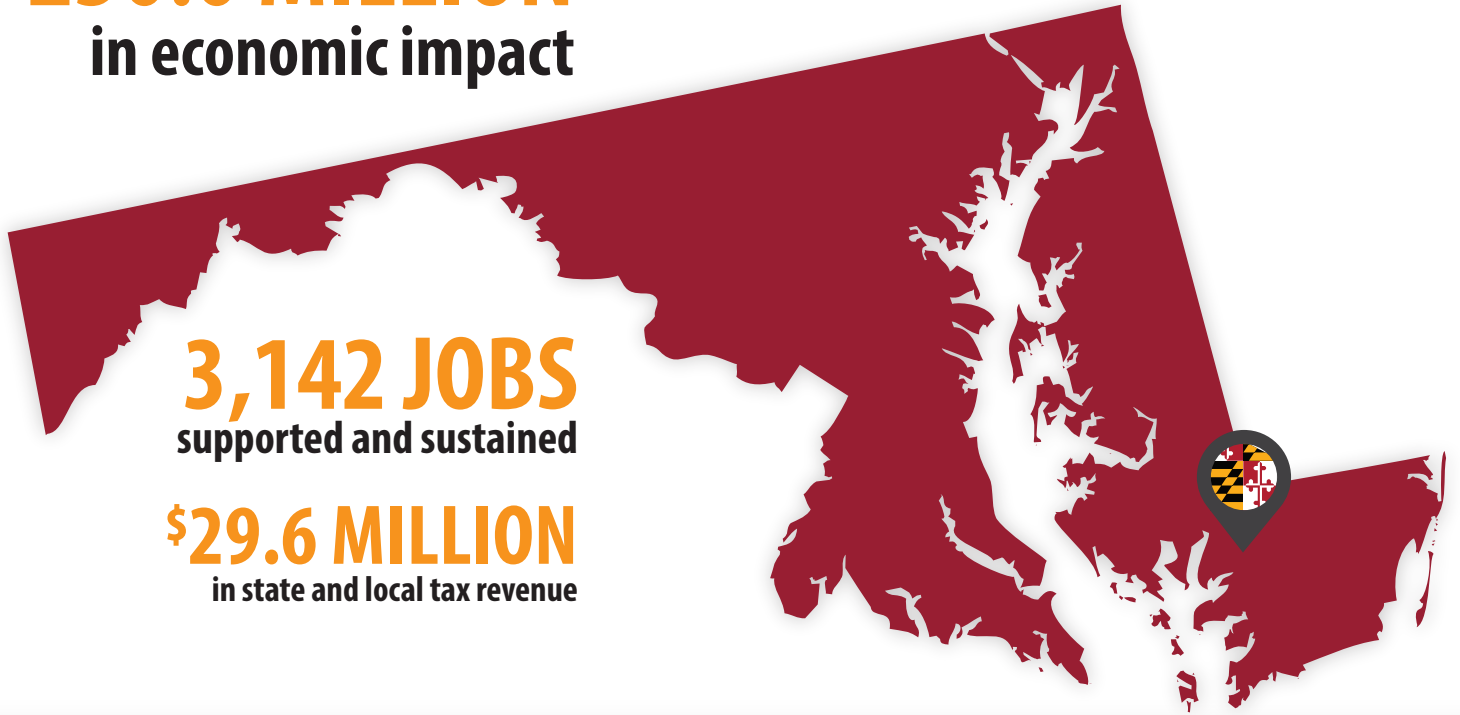
  
**MARYLAND**  
**HERITAGE AREA**  
Maryland Heritage Areas Authority

# BEACH TO BAY HERITAGE AREA MAKES AN IMPACT

**\$230.0 MILLION**  
in economic impact

**3,142 JOBS**  
supported and sustained

**\$29.6 MILLION**  
in state and local tax revenue



Smith Island is Maryland's only inhabited island in the Chesapeake accessible only by water.

**1,235**  
miles of shoreline

**Home to the**  
Assateague Seashore

Only place in Maryland where the shores of the Atlantic Ocean and the Chesapeake Bay are only an hour apart.

Isaiah Fassett was the oldest living civil war veteran when he died in 1946 at the age of 102. He was the second oldest in the state of Maryland.

**1<sup>st</sup> Presbyterian Church**  
in the United States

**Smith Island Cake**  
Maryland's official state dessert

Baseball Hall of Famers Evan Philips and Bruce Howard hailed from Salisbury, MD

Steven & Lemuel Ward, fondly known as the Ward brothers, turned handmade hunting decoys into an art form, and those decoys have a place in museums around the country.

# ABOUT BEACH TO BAY HERITAGE AREA

**OUR MISSION IS TO** promote, preserve and protect the cultural heritage as well as the historical and natural assets of Maryland's Lower Eastern Shore.

The Beach to Bay Heritage Area (BTBHA) is one of thirteen Maryland-certified heritage areas. Located on Maryland's Lower Eastern Shore, this three-county, parallelogram-shaped area is bordered by the Atlantic Ocean and Chesapeake Bay, Delaware, and Virginia rivers. It is a place of incomparable 'shore-scapes,' storied spiritual history and culture defined by water. Maryland's Lower Eastern Shore is a rural region with a wealth of historic, cultural and natural resources that distinguish it from other places in the state and country. The lower shore counties of Somerset, Wicomico and Worcester encompass a vast region stretching from the shorelines of Tangier Sound and Chesapeake Bay to the beaches of the Atlantic seaboard.

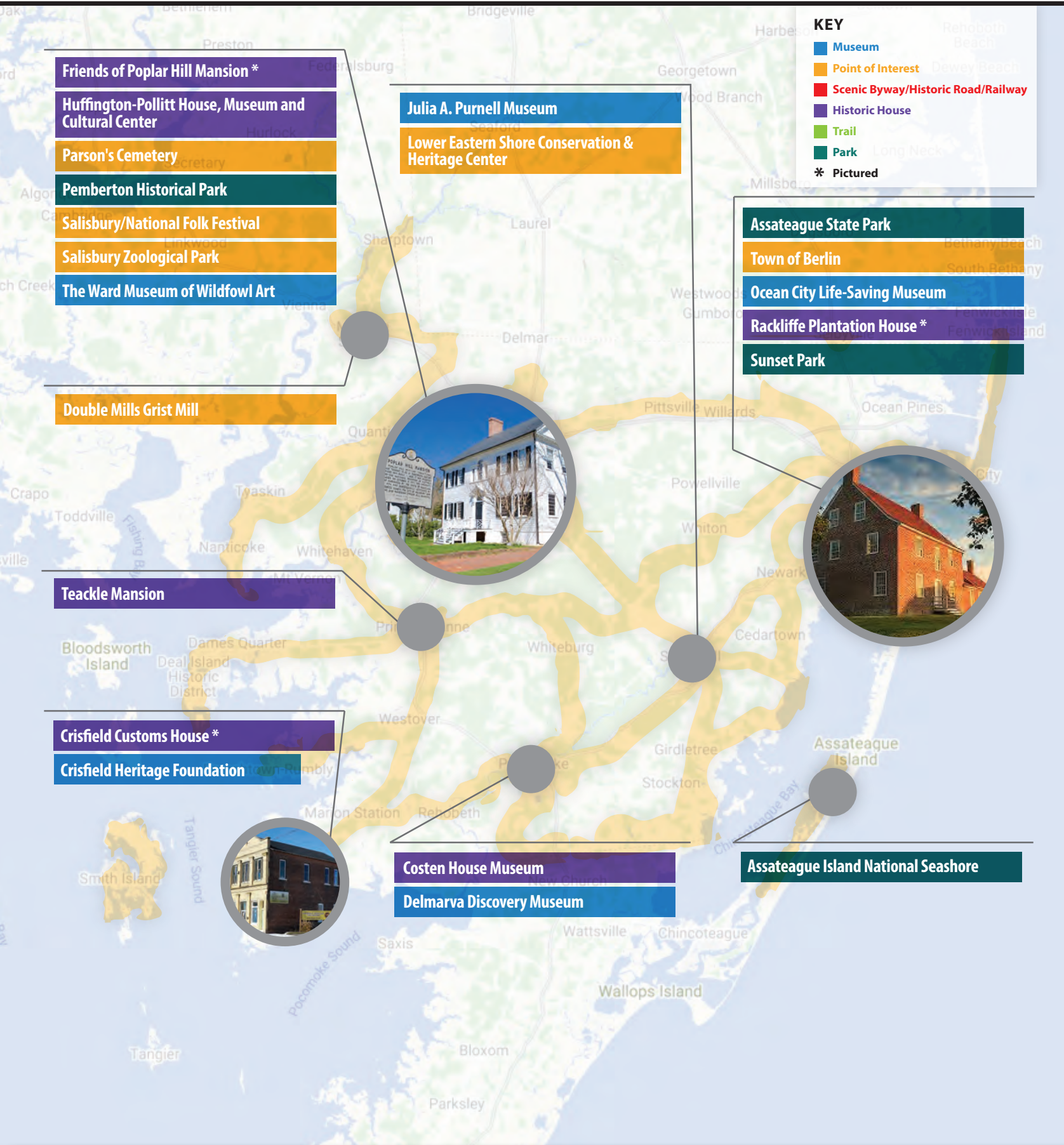
The natural influences of ocean, bay, wetlands, rivers, and the lands in between have created a distinctive cultural landscape on Maryland's lower eastern shore. Geography has meant that it has played an important role in the nation's development. Small towns and unincorporated communities bound by close contact with one another across the water contribute greatly to the rural identity of the region. Visitors experience a landscape influenced by different eras – eighteenth-century river and bay communities give way to nineteenth-century railroad towns, and twentieth-century neighborhoods.

Since its beginnings, life on the Lower Eastern Shore has depended on the Atlantic Ocean, the Chesapeake Bay, its tributaries, the marshes and land between. Evidence of past peoples and cultures echoes throughout the region. The Manokin, Nanticoke, Pocomoke, and Wicomico Rivers and the outer bays connect the past and present, towns with history, and homes with open spaces. The seafood and agriculture industries have long formed the backbone of the lower shore economy, sustaining a way of life built on the resources of land and water.

Through a variety of partnerships with individual citizens, representatives of various organizations, and public agencies, the Beach to Bay Heritage Area works to blend economic development at the local level with the conservation of the area's natural, cultural and historic resources in a regional heritage area approach that better serves all counties and municipalities on Maryland's Lower Eastern Shore. The Beach to Bay Heritage Area is grassroots, nonprofit organization whose purpose is to preserve, protect and promote the cultural, natural and historical heritage of Somerset, Wicomico, and Worcester counties.

# BEACH TO BAY KEY SITES

## SPAN ACROSS WICOMICO, SOMERSET, AND WORCESTER COUNTIES



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.

# BEACH TO BAY HERITAGE AREA

## ECONOMIC CONTRIBUTION

The economic impact of the Beach to Bay Heritage Area is **\$230.0 million** annually. This economic impact consists of tourism driven by the presence of the Beach to Bay Heritage Area (\$228.9 million), and the operations and grantmaking activities of the heritage area in collaboration with MHAA (\$1.0 million).

|              | Operations and Grantmaking | Heritage Tourism     | TOTAL Impact         |
|--------------|----------------------------|----------------------|----------------------|
| Direct       | \$544,592                  | \$134,449,830        | \$134,994,422        |
| Indirect     | \$244,996                  | \$44,187,119         | \$44,432,115         |
| Induced      | \$249,016                  | \$50,282,644         | \$50,531,660         |
| <b>Total</b> | <b>\$1,038,604</b>         | <b>\$228,919,593</b> | <b>\$229,958,197</b> |

Source: Parker Phillips using IMPLAN

## EMPLOYMENT CONTRIBUTION

The employment impact of the Beach to Bay Heritage Area is **3,142 jobs** supported and sustained. This economic impact is driven by the presence of the Beach to Bay's operations and grant making activities which support 15 jobs and tourism in the heritage area supporting 3,129 jobs.

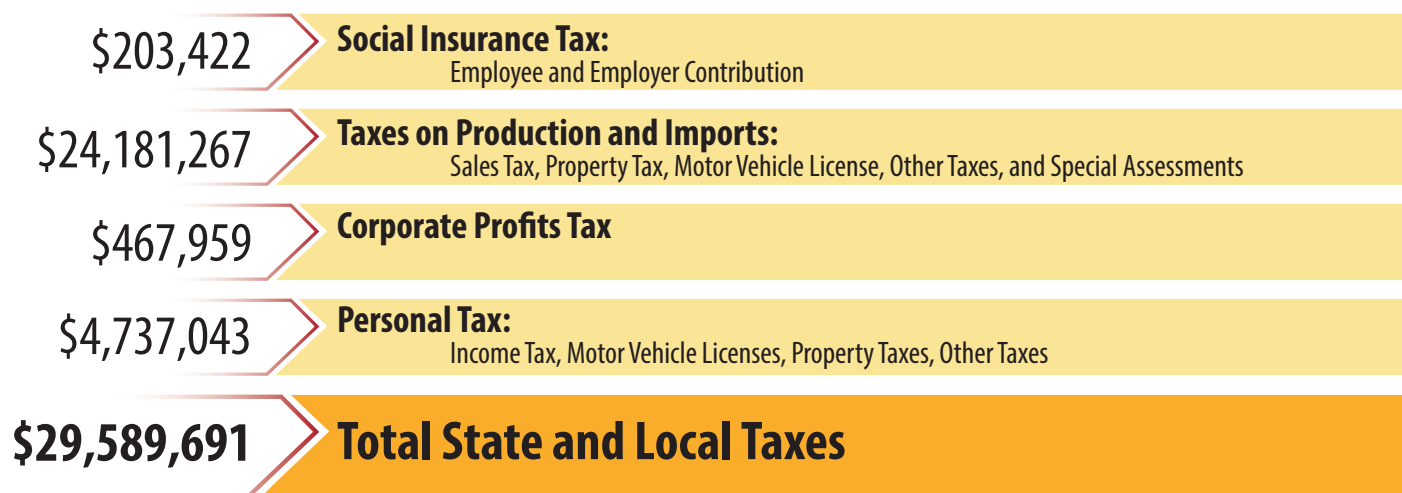
|              | Operations and Grantmaking | Heritage Tourism | TOTAL Employment |
|--------------|----------------------------|------------------|------------------|
| Direct       | 10                         | 2,219            | 2,229            |
| Indirect     | 3                          | 420              | 423              |
| Induced      | 3                          | 490              | 493              |
| <b>Total</b> | <b>13</b>                  | <b>3,129</b>     | <b>3,142</b>     |

Source: Parker Phillips using IMPLAN

# BEACH TO BAY HERITAGE AREA

## STATE AND LOCAL TAX CONTRIBUTION

The total state and local taxes generated as a result of the Beach to Bay Heritage Area based upon operations, grantmaking, and tourism totals **\$29.6 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).

# ECONOMIC IMPACT OF BEACH TO BAY

## 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.

## THE DELMARVA DISCOVERY MUSEUM

The Delmarva Discovery Museum, located on the Pocomoke River, serves as a source of learning and discovery for visitors through its preservation and interpretation of cultural and natural heritage, unique to the area. Visitors can explore the rich history and natural world of Delmarva - the peninsula consisting of Delaware and the Eastern Shores of Maryland and Virginia, and learn how the lives of the people on Delmarva are shaped by the water and land, and how the people, in turn, reshape this environment.

This hands-on center offers visitors of all ages an experience of life on the Delmarva peninsula, including a handicap-accessible touch pool which features animals that inhabit the Chesapeake and Atlantic Coastal Bays. Visitors can learn about Native American culture dating back to 12,000 years ago, and the day-to-day life of the first settlers of Delmarva. Other exhibits feature North American River Otters, reptiles and amphibians native to Delmarva, as well as the 19th Century Pocomoke River steamship, the Discovery. The Delmarva Discovery Museum educates young and old about the incomparable rich cultural and natural history found in this area.

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**“THERE IS A GREAT DEAL OF DIVERSITY ON THE LOWER EASTERN SHORE OF MARYLAND. THE HERITAGE AREA IS TRYING TO BRING COMMUNITIES IN THE FOLD WITH SPECIALIZED AND UNIQUE CONTENT. THE AREA HAS A DIVERSE AND RICH TRADITIONAL CULTURE BOTH ON AND OFF THE WATER.”**

CYNTHIA BIRD, PHD  
EXECUTIVE DIRECTOR, JULIA A. PURNELL MUSEUM

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