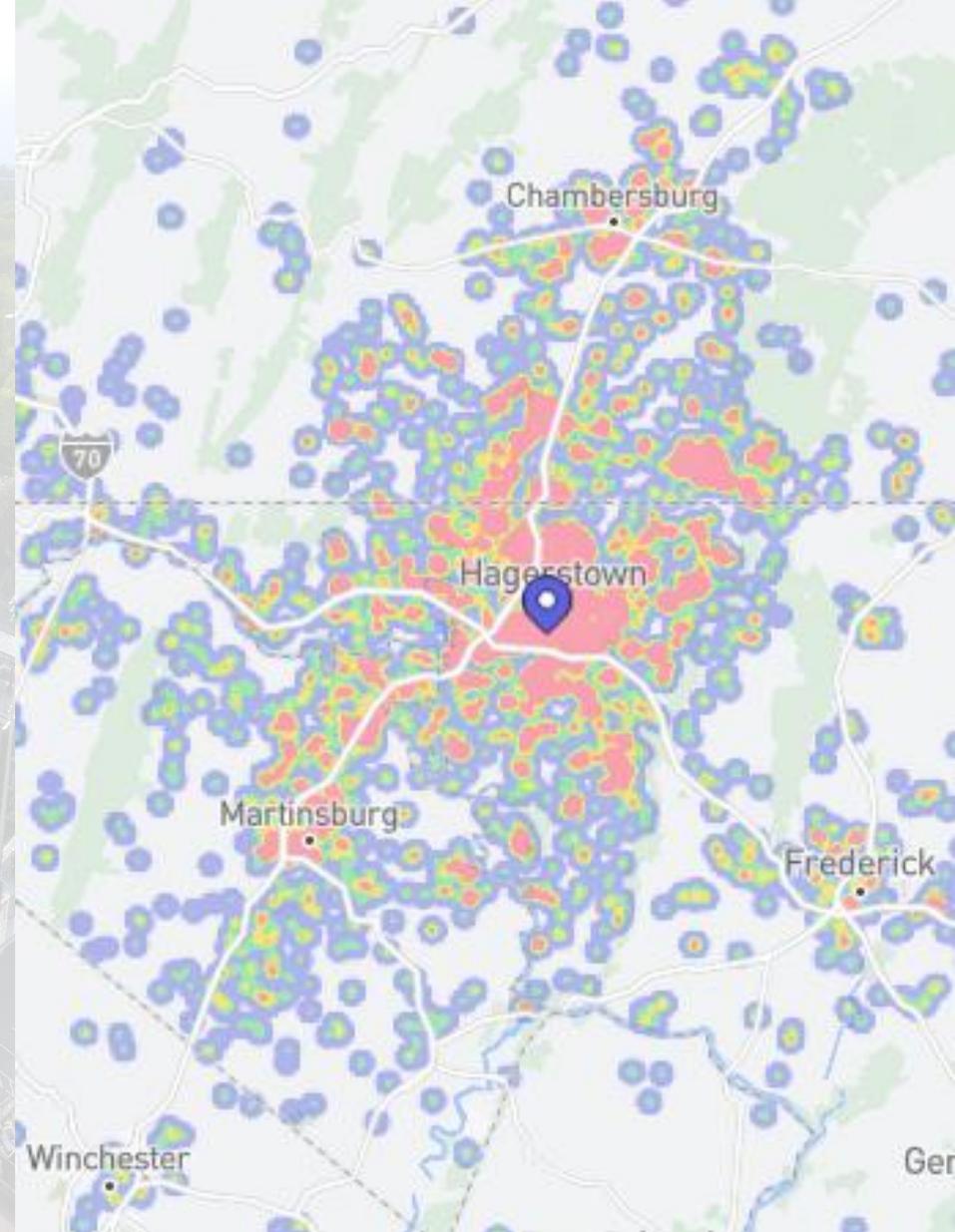


# Hagerstown Boxcars 2025 Season at Meritus Park

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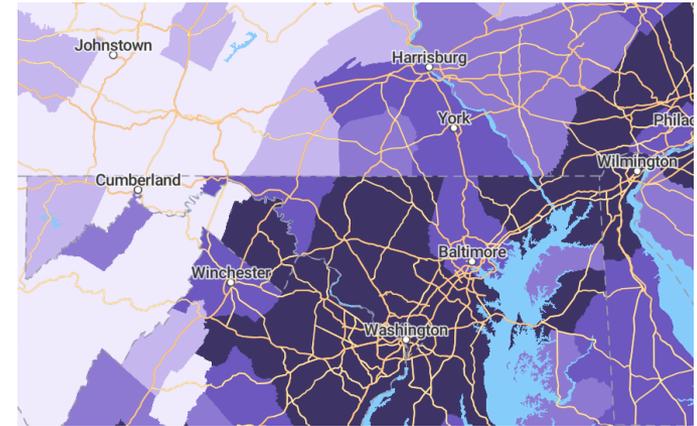
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# Study Parameters

- Firefly conducted a Placer.ai analysis to understand visitation to Meritus Park during the Hagerstown Boxcars' 2025 season.
- Placer.ai aggregates cell phone data from popular smart phone apps. As such, cell phone visitor analysis cannot capture all visitation to a destination because an (ever-decreasing) portion of visitors do not carry smart phones with them. US Census data suggests 85% of Washington County residents have a smart phone, while counties to the east within the stadium's trade audience have even higher rates (i.e., 91% in Frederick County).
- Unless otherwise noted, data has been filtered to a 10-minute or greater dwell time to eliminate deliveries and other brief visits from the analysis.
- For the purposes of this analysis, "visitors" refers to all visitors and "tourists" refers to visitors traveling 50+ miles to the stadium.



*The stadium's trade area includes counties with higher-than-average smart phone ownership rates. (PolicyMap)*





# Total Visitation

Year	Visits	Visitors	Frequency	Dwell Time
2024	136,700	75,800	1.8	121 mins.
2025	107,500	62,800	1.7	165 mins.

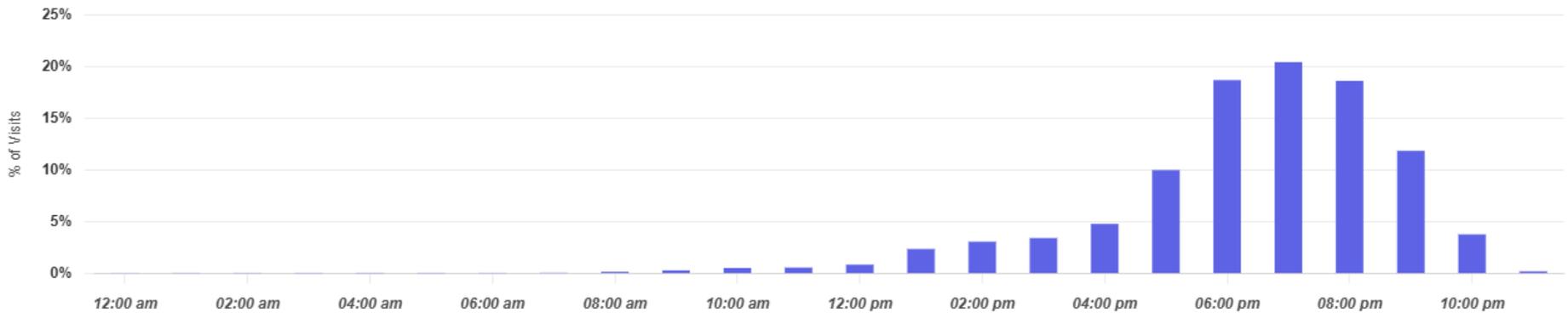
## WEEKLY VISITS





# Hourly Visits by Percent of Visitation

20.4% of all visits occur in the 7pm hour.



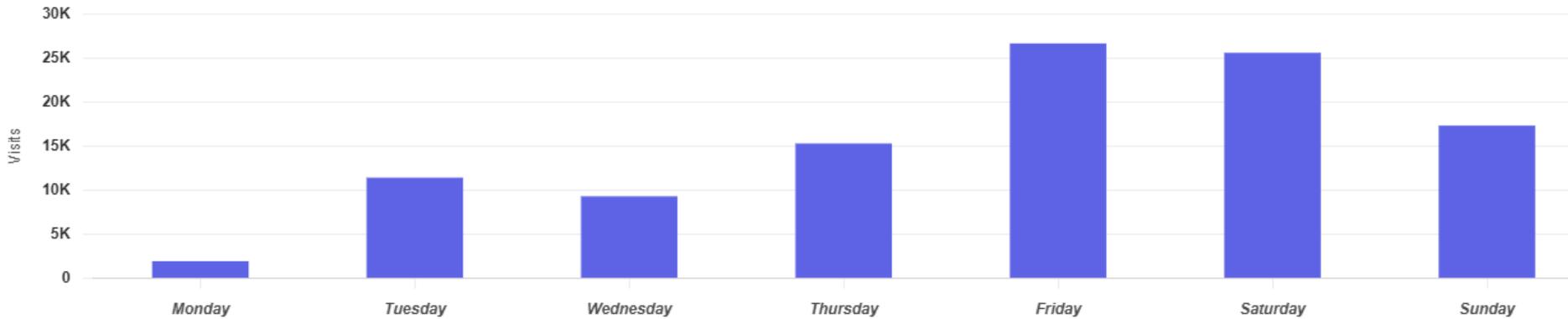
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# Daily Visits by Percent of Visitation

Friday and Saturday continue to be top visited days, which is consistent with 2024.



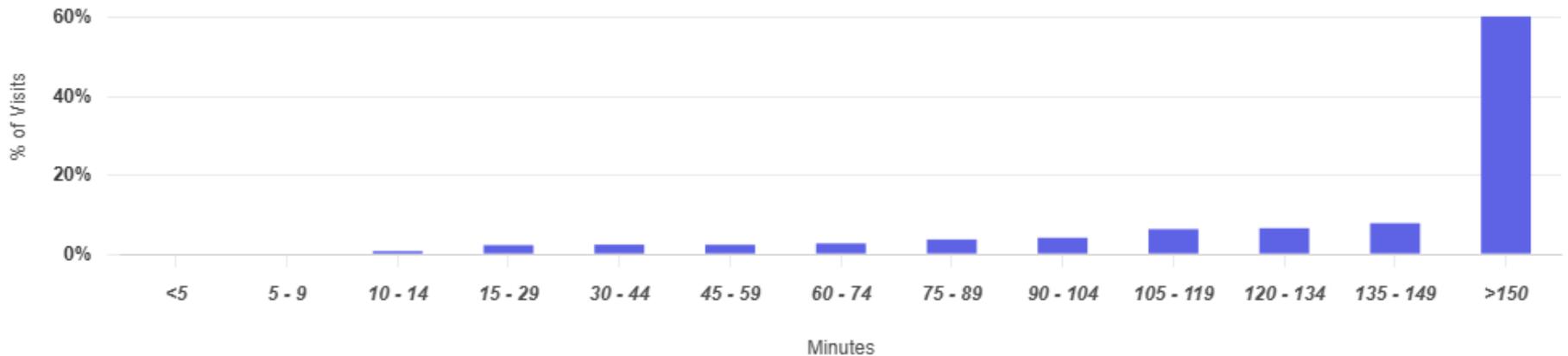
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# Dwell Time by Percent of Visitation

Average visitor dwell time in 2025 was 165 minutes compared to 121 minutes in 2024 or a 36% increase year over year.



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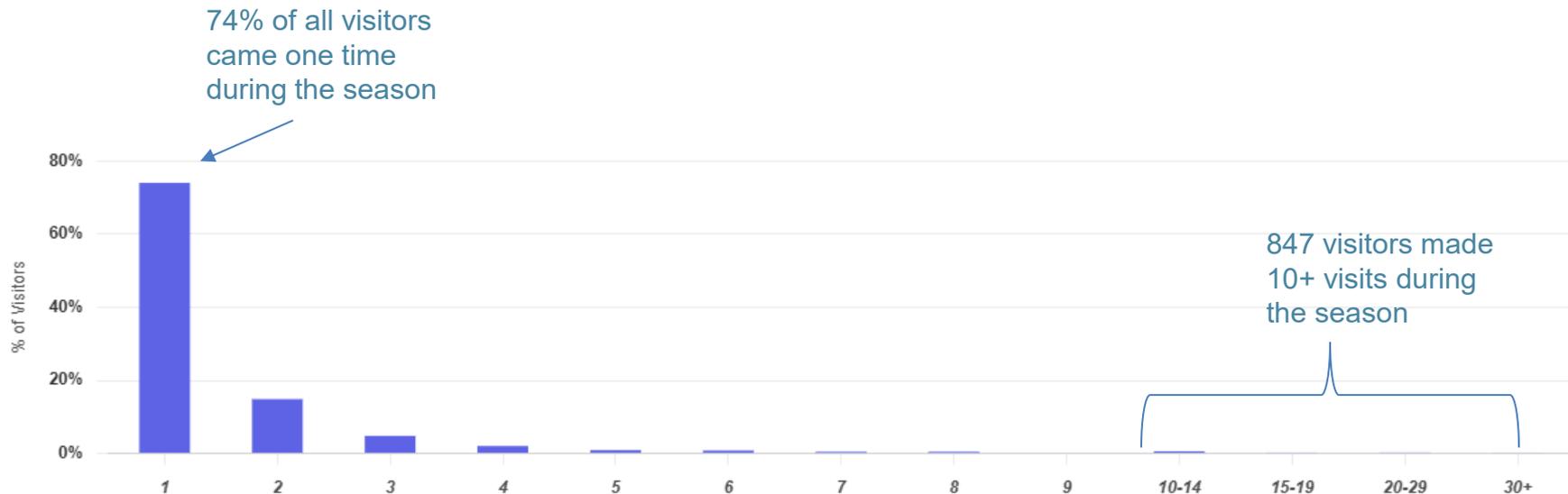
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# Visit Frequency

In 2025, tourists made an average of 1.28 visits compared to 1.71 visits for all other users. In 2024, tourists made an average of 1.22 visits compared to 1.8 visits for all others.

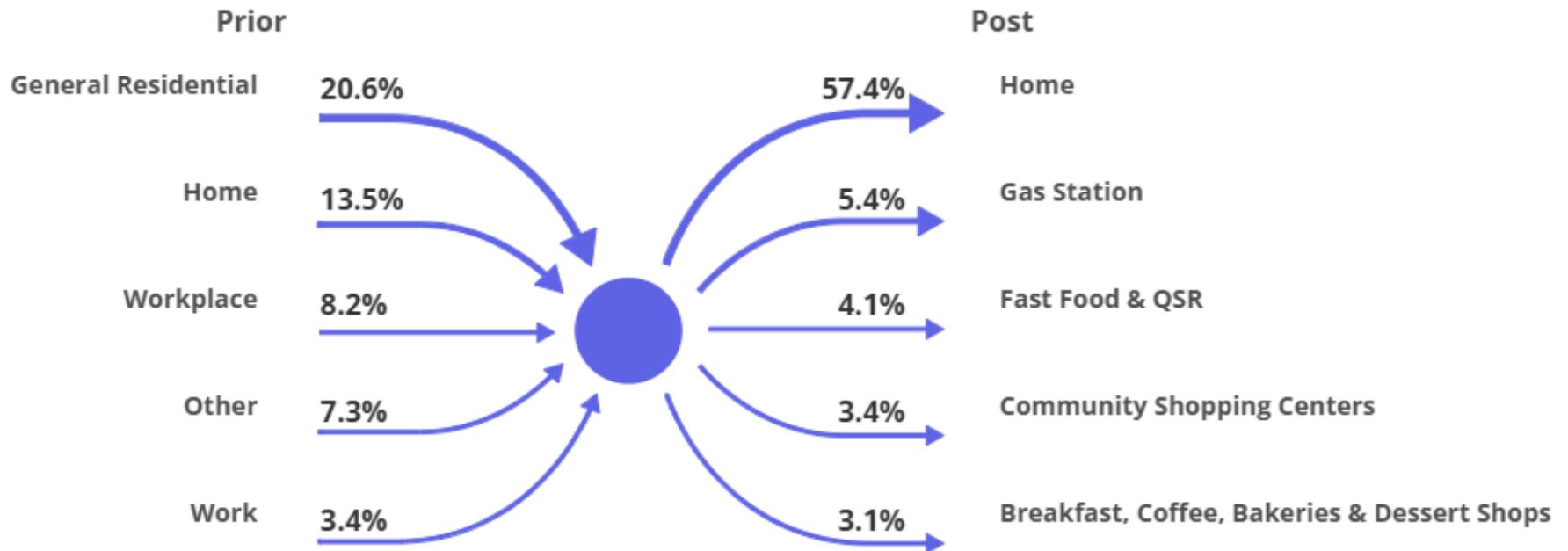
While the percentage of visitors coming one time to the stadium held steady, the number of visitors coming 10+ times during the season declined by 24% to 847.





# Visitor Journey by Category

The dot in the middle represents Meritus Park. The generalized categories of immediate destination prior to and after a visit to the park are listed on both sides.





# Prior/Post Stadium Visitation (All)

This chart shows visits to destinations prior to and post a stadium visit. The YoY change figure is included for destinations that also appeared in the top destinations for 2024. Many of these locations are likely uses for parking.

Name	Address	Prior Visits	Post Visits	Total Visits	YoY Change
J. Louis Boulbitz District Court	36 W Antietam St	4060	171	4231	+165%
Downtown Hagerstown	59 W Washington St	1577	474	2051	-
The Maryland Theatre	21 S Potomac St	1287	707	1994	+94.2%
5557 S Potomac St LLC	55 S Potomac St	1826	158	1984	+3.3%
Broad Axe	28 W Franklin St	490	1459	1949	+5.1%
Sleep Inn & Suites Hagerstown	18216 Col Henry K Douglas Dr	1267	680	1947	-
Krumpe's Do-Nut Shop	912 Maryland Avenue	N/A	1905	1905	+7.1%
Herald-Mail Media	100 Summit Ave	1811	N/A	1811	+25%
PressRoom at The Herald-Mail	100 Summit Avenue	1254	353	1607	-
Hub Bubbles	151 S Potomac St	523	504	1027	-18.7%
Ellsworth Electric	88 W Lee St	874	N/A	874	-
Sheetz	1396 S Potomac St	N/A	841	841	-
Valley Mall	17301 Valley Mall Rd	439	383	822	-11%





# Prior/Post Stadium Visitation (Dining/Bars)

This chart shows dining/bar destinations only.

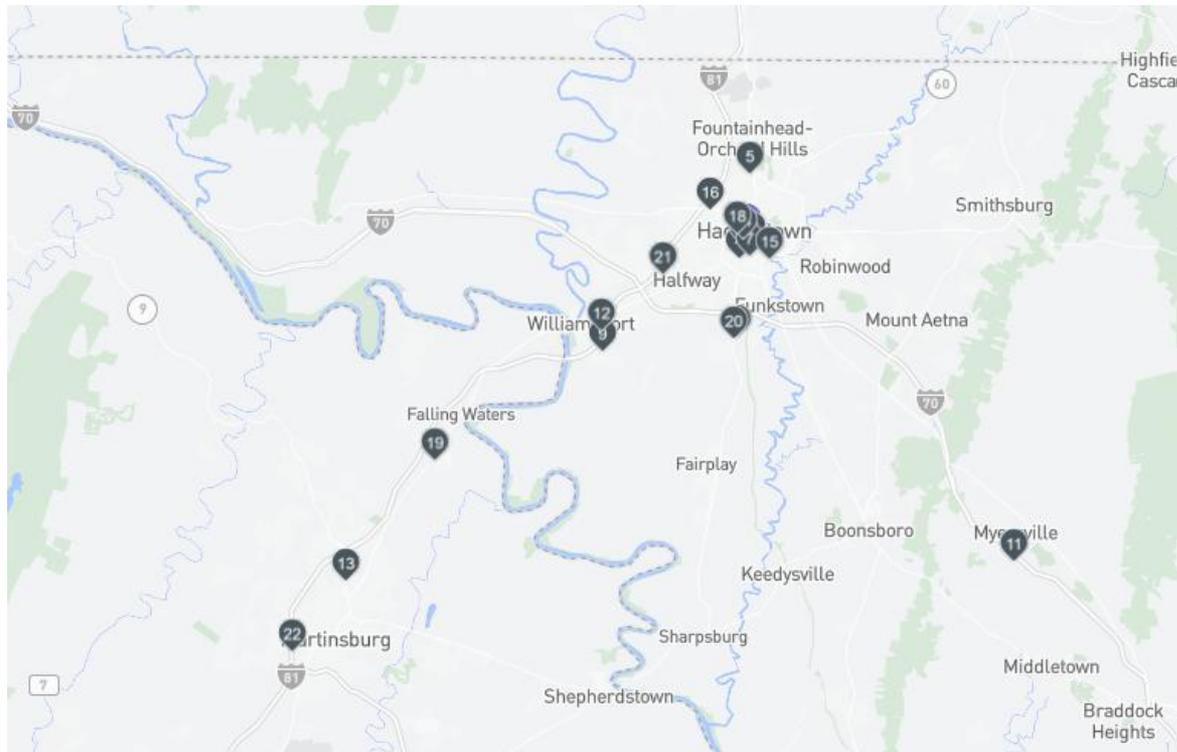
Name	Address	Prior Visits	Post Visits	2025 Total Visits
Broad Axe	28 W Franklin St	490	1459	1949
Krumpe's Do-Nut Shop	912 Maryland Avenue	N/A	1905	1905
Chic's Seafood	300 Summit Ave	554	N/A	554
McDonald's	316 E Washington St	N/A	453	453
The Big Dipper	1033 Virginia Ave.	N/A	428	428
BJ's Restaurant and Brewhouse	17318 Valley Mall Rd c	N/A	353	353
Bistro 11	13208 Fountain Head Plz	169	147	316
Chick-fil-A	10510 Vida Drive	46	264	310
Texas Roadhouse	120 S. Edgewood Drive	N/A	238	238
McDonald's	313 East Potomac Street	59	174	233
Rad Pies	10210 Governor Lane Blvd	145	58	203
Five Guys	18007 Garland Groh Blvd	47	152	199
Rocky's New York Pizza	907 S Potomac St	N/A	192	192





# Top 50 Destinations Prior

Stops following the stadium are similarly concentrated. The significant portion of non-downtown businesses suggests there is an opportunity to capture stadium visitors as downtown patrons prior to the game.



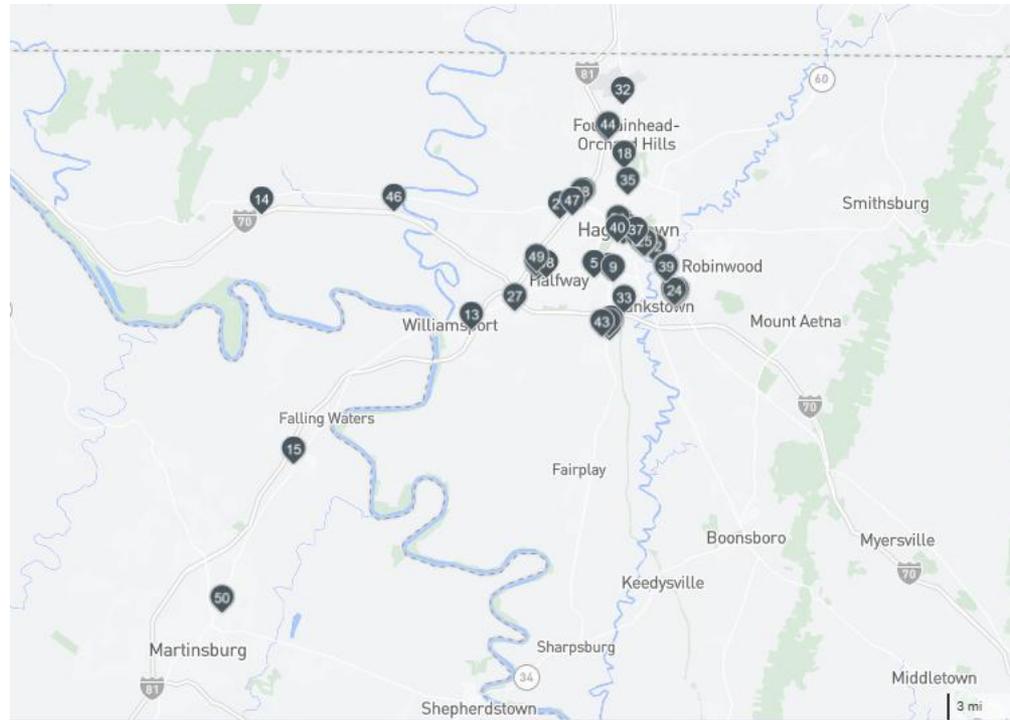
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# Top 50 Destinations Post

Stops following the stadium are similarly concentrated. The significant portion of non-downtown businesses suggests there is an opportunity to capture stadium visitors as downtown patrons post game.



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# Hotel Destinations Totals

11 regional hotels shared 3,649 visits, with the Sleep Inn Suites (1,947), Comfort Suites (646) Hampton Inn (376) and Homewood Suites (207) attracting the most visits.

This represents a significant increase since 2024, with overall visits increasing 203% year over year and individual hotels seeing significant growth. For example, Sleep Inn Suites saw 664% growth from 255 visits in 2024 to 1,947 visits in 2025, in large part due to the Boxcar's using the hotel as their preferred hotel for visiting teams. Comfort Suites benefited from umpire stays, as well.

Name	Address	Prior Visits	Post Visits	Total Visits
Sleep Inn & Suites Hagerstown	18216 Col Henry K Douglas Dr	1267	680	1947
Comfort Suites	1801 Dual Hwy	346	300	646
Hampton Inn Hagerstown Maryland	1716 Dual Hwy	38	338	376
Homewood Suites by Hilton Hagerstown	1650 Pullman Ln	N/A	207	207
Holiday Inn Express Greencastle,	50 Pine Dr	49	38	87
SpringHill Suites by Marriott Hagerstown	17280 Valley Mall Rd	N/A	77	77
Hampton Inn	18300 Peak Cir	75	N/A	75
Residence Inn Morgantown	1046 Willowdale Road	N/A	75	75
Home2 Suites by Hilton Hagerstown	1661 Pullman Lane	N/A	55	55
Hollywood Casino at Charles Town Races	750 Hollywood Dr	N/A	42	42
Courtyard by Marriott Hagerstown	17270 Valley Mall Rd	N/A	31	31
Fairfield Inn & Suites Hagerstown	89 All Star Court	N/A	20	20
Red Roof Inn	310 E Potomac St	N/A	11	11

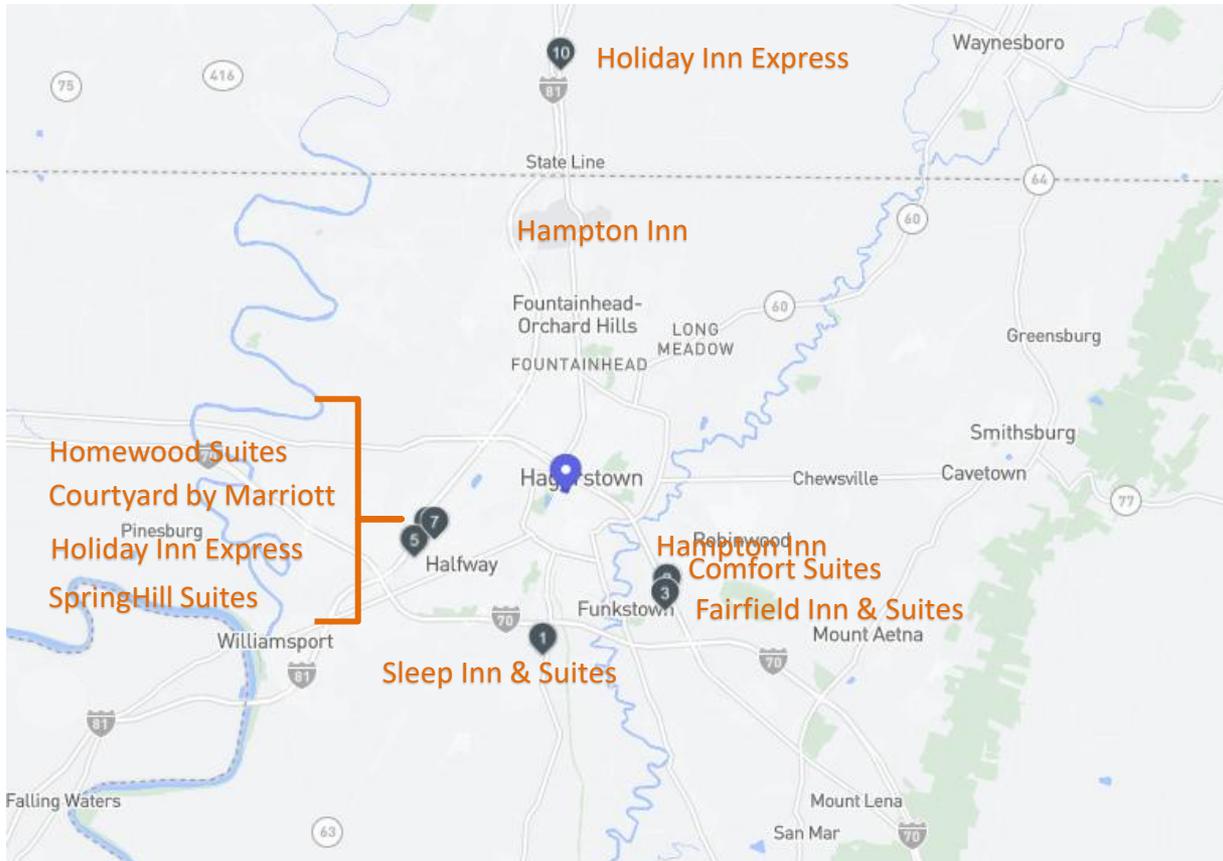
*Note: These figures will differ from hotel occupancy rates because some visits are attributed to the same visitor and these figures only capture visitors going directly from their hotel to the stadium or vice versa. They should be used to identify outliers and trends.*





# Hotel Destinations Totals

The 2025 map of hotels is generally consistent with the 2024 map.





# Visitor Favorite Places

These are the locations Meritus Park visitors visited most frequently during season, which is useful for reaching target audiences via marketing and promotions.

Rank	Name	Distance (miles)	Visitors (%)
1	Valley Mall	2.7	43.1K (68.6%)
2	Valley Park Commons	2.1	39.9K (63.5%)
3	Centre at Hagerstown	1.8	39.5K (62.9%)
4	Crosspoint	3	35.2K (56%)
5	Valley Plaza	2.3	25.2K (40.1%)
6	Target	3	25K (39.8%)
7	Sam's Club	2.3	24.7K (39.4%)
8	Long Meadow Shopping Center	2	24.7K (39.4%)
9	Walmart	1.8	24.5K (38.9%)



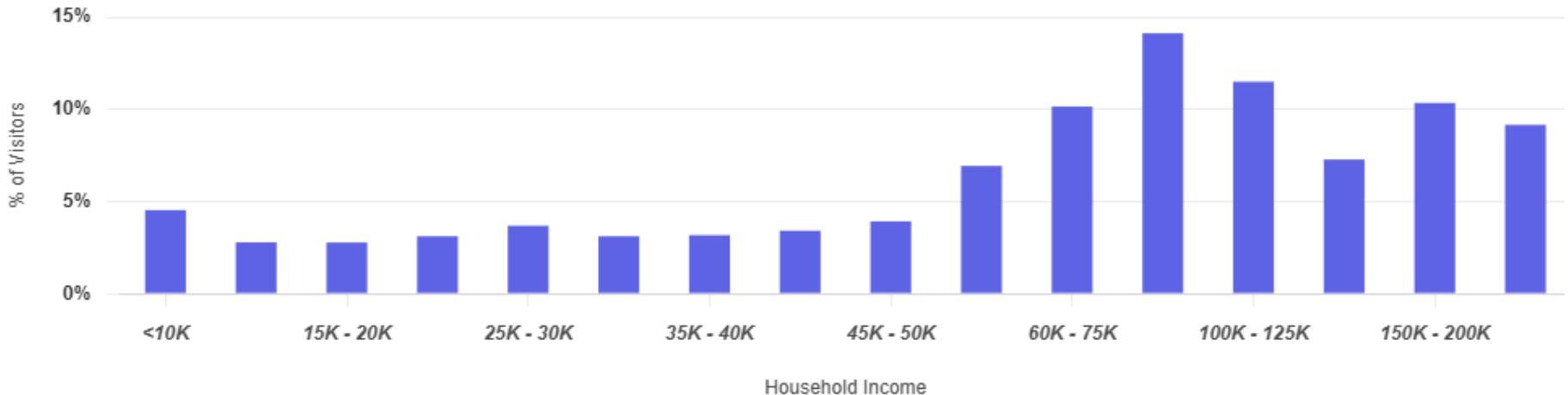


# Visitor Household Income

Average household income: \$101,000

Median household income: \$79,000

Both figures represent a slight increase from 2024.



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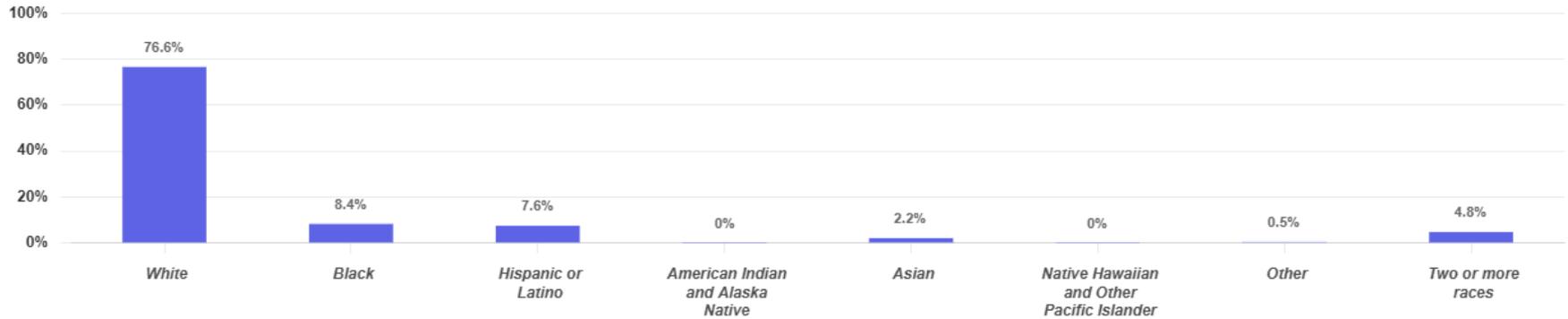


Convention and Visitors Bureau

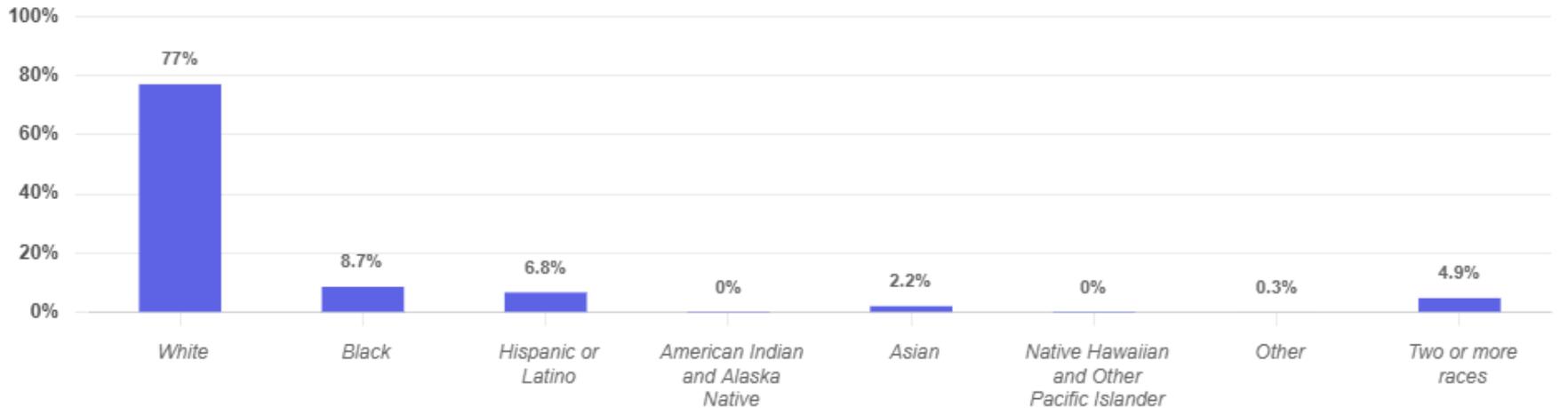


# Visitor Ethnicity

## 2025 Visitor by Ethnicity

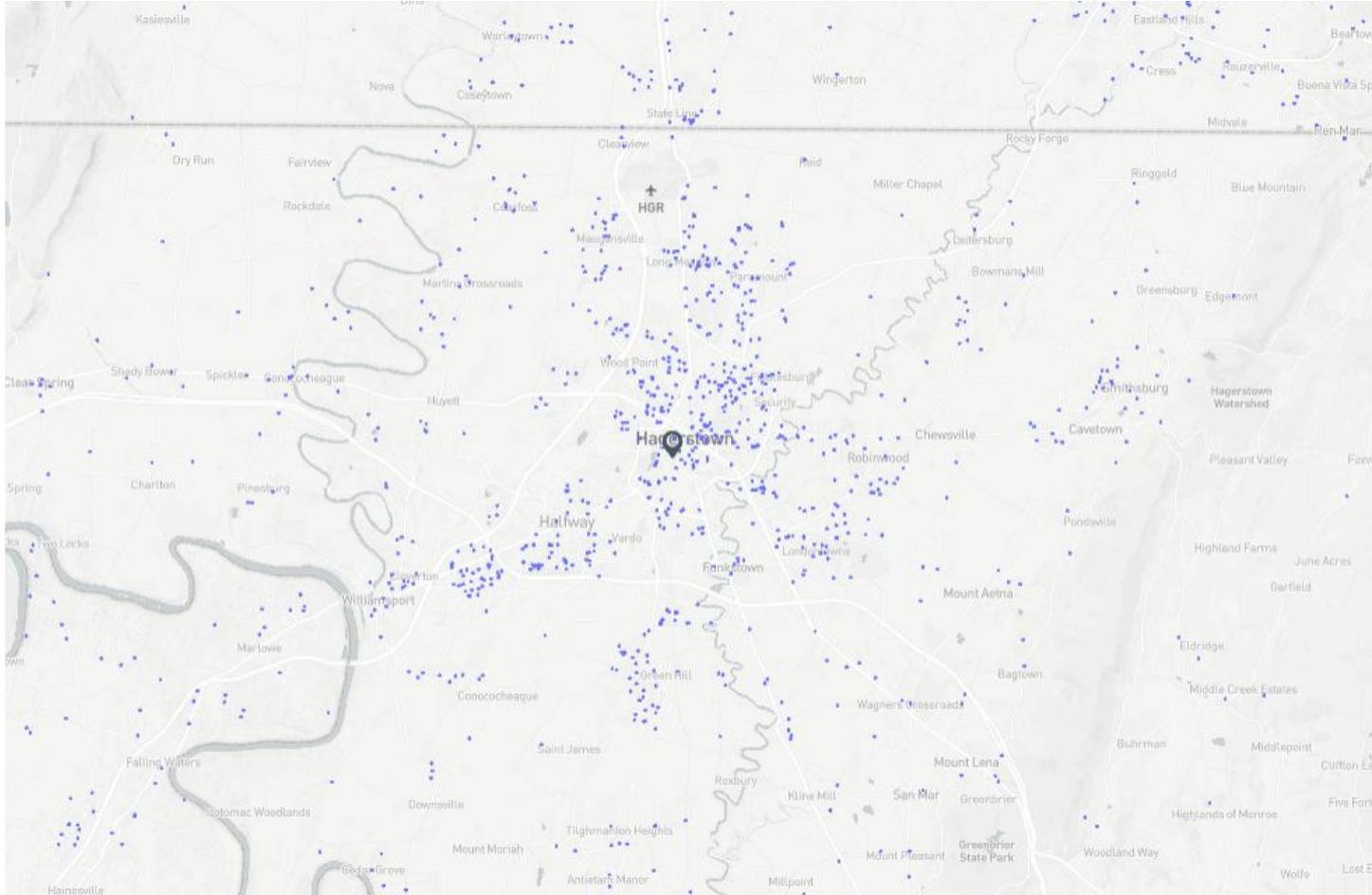


## 2024 Visitor by Ethnicity





# Trade Area (Visitor Homes)

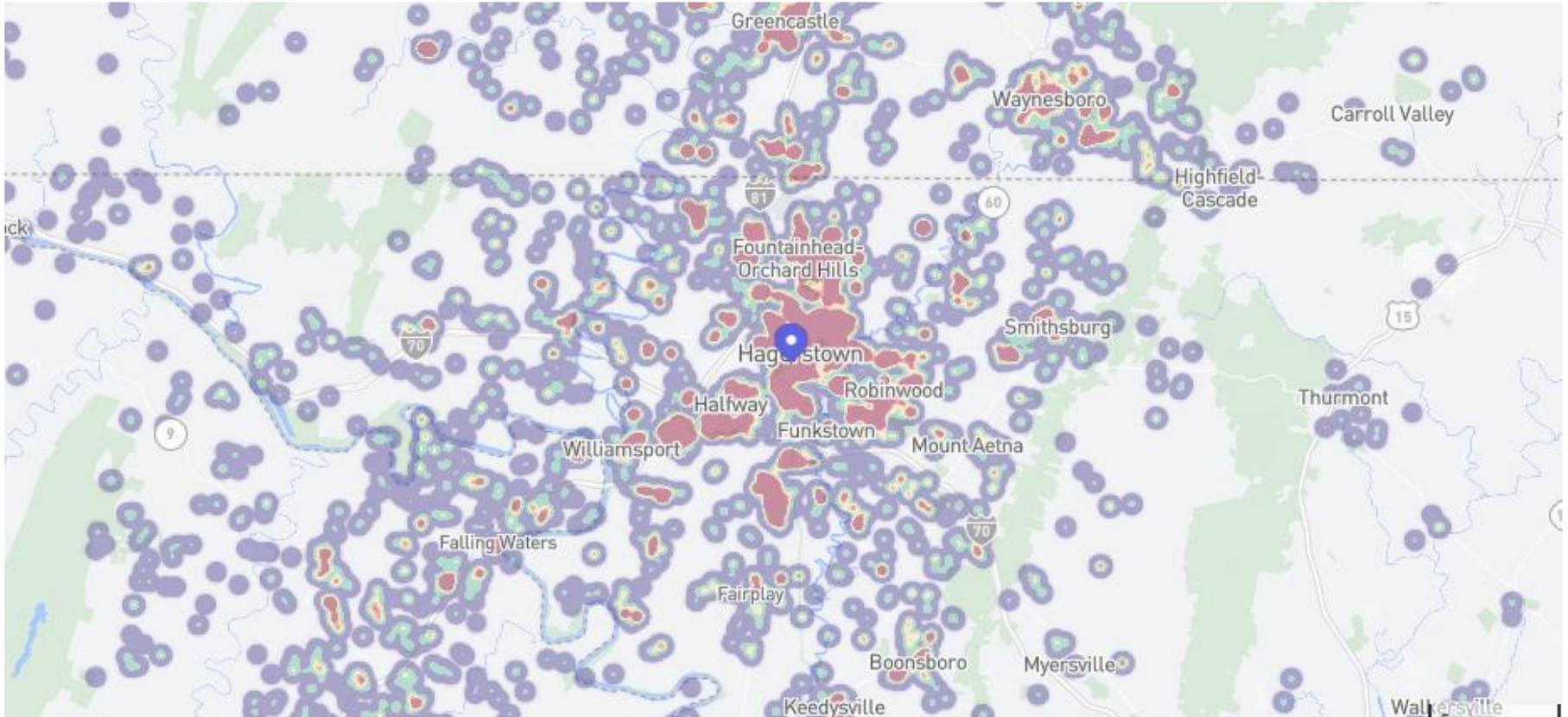


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# Trade Area (Visitor Homes)

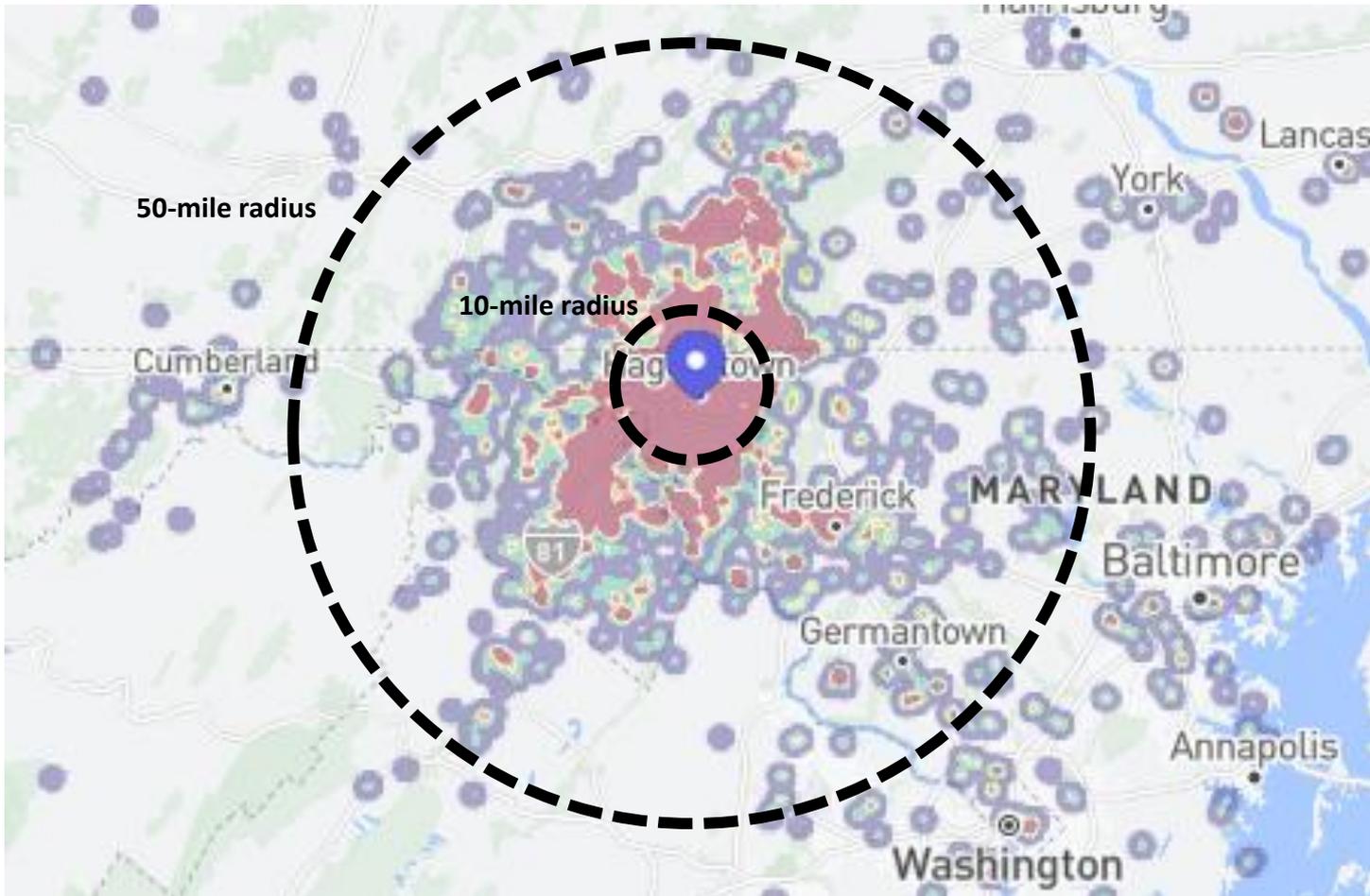


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# Trade Area (Visitor Homes)



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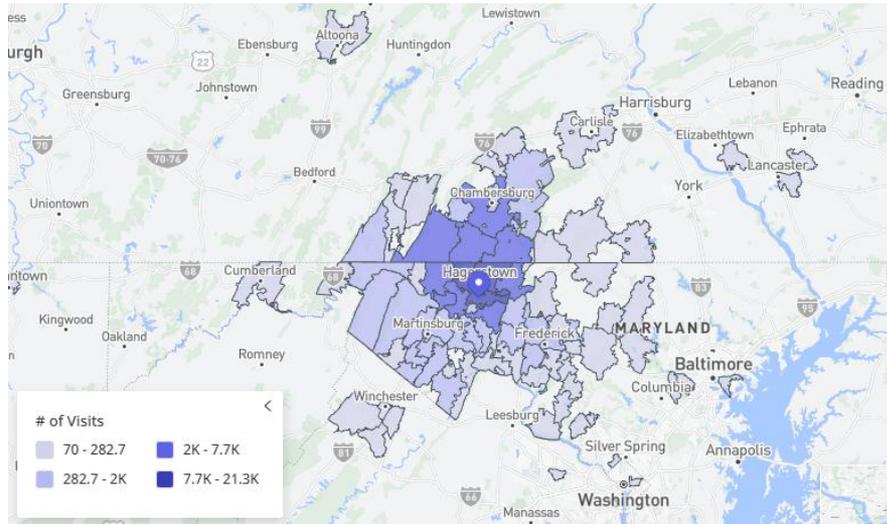


# Trade Area (Zip Codes)

Between 2024 and 2025 the top 6 zip codes for visitor home locations remained unchanged. In the 2025 season, zip codes in the Falling Waters, WV and Boonsboro, MD markets replaced the Clear Spring, MD and Cavetown, MD markets in the top zip code listings.

## 2025

## 2024



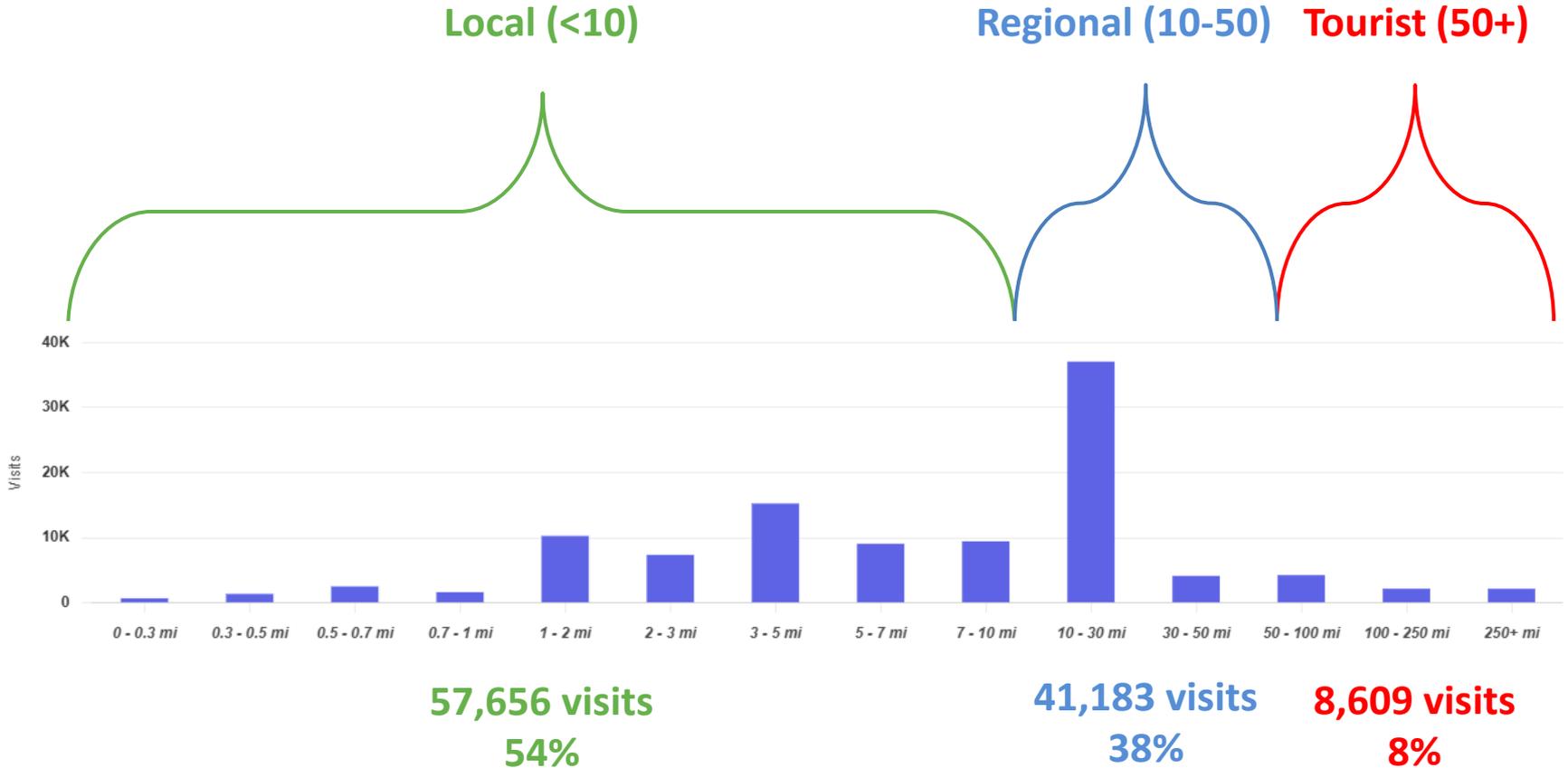
<b>21740</b> Hagerstown, MD	21.3K (19.9%)
<b>21742</b> Fountainhead-orchard Hills,...	17.9K (16.6%)
<b>17225</b> Greencastle, PA	6.9K (6.5%)
<b>17268</b> Waynesboro, PA	5.3K (4.9%)
<b>21795</b> Williamsport, MD	4.9K (4.5%)
<b>17202</b> Chambersburg, PA	2.7K (2.5%)
<b>25419</b> Falling Waters, WV	2.6K (2.4%)
<b>21713</b> Boonsboro, MD	2.5K (2.3%)

<b>21740</b> Hagerstown, MD	32.5K (23.8%)
<b>21742</b> Hagerstown, MD	23.9K (17.5%)
<b>17225</b> Greencastle, PA	8.8K (6.4%)
<b>17268</b> Waynesboro, PA	6K (4.4%)
<b>21795</b> Williamsport, MD	6K (4.4%)
<b>17202</b> Chambersburg, PA	3.9K (2.9%)
<b>21713</b> Boonsboro, MD	3.6K (2.7%)
<b>21722</b> Clear Spring, MD	3.6K (2.6%)
<b>21783</b> Cavetown, MD	3.4K (2.5%)





# Distance Traveled from Home



Between 2024 and 2025, the stadium grew more reliant on visitors from 10+ miles, as local visitation declined 4.4% as a portion of overall visitation.



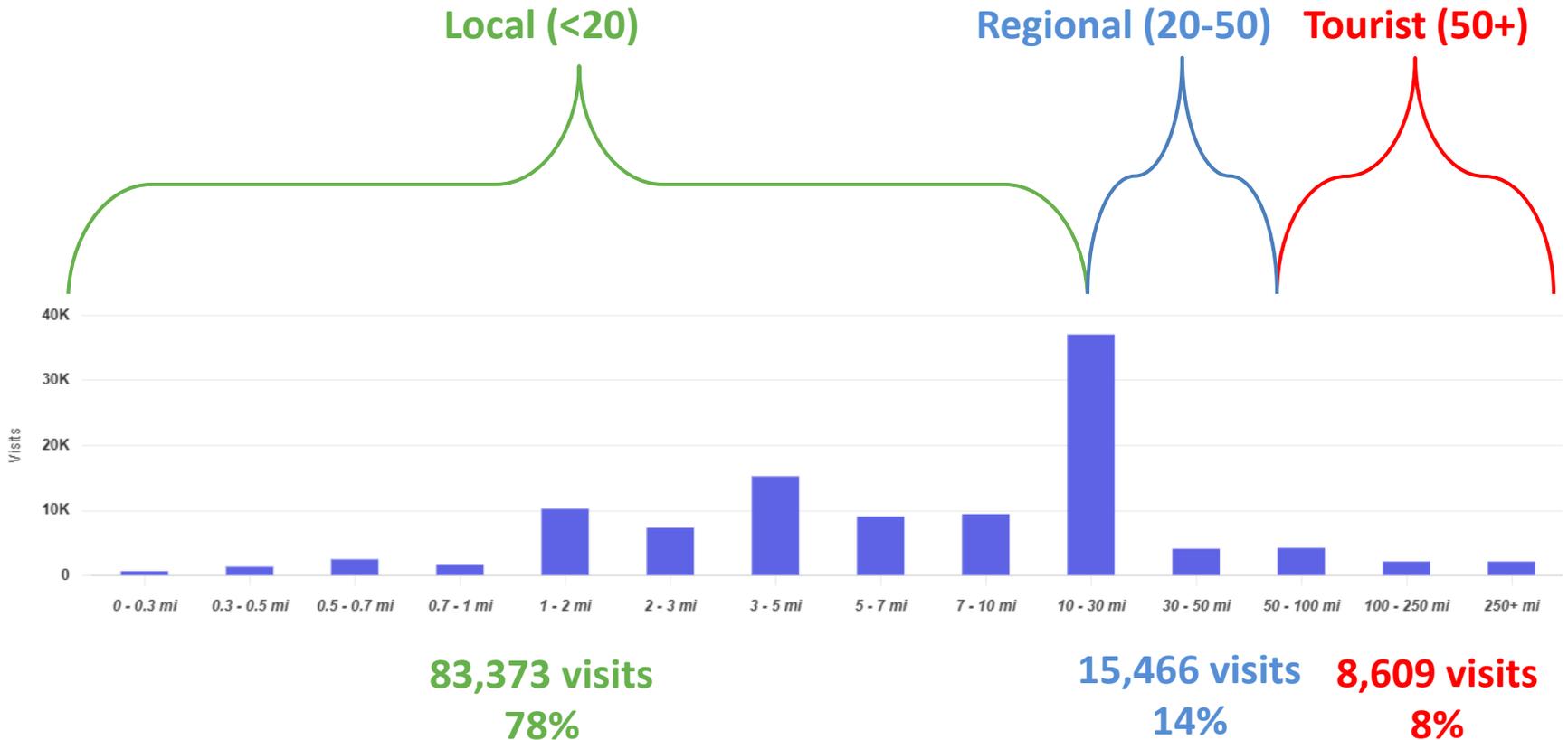
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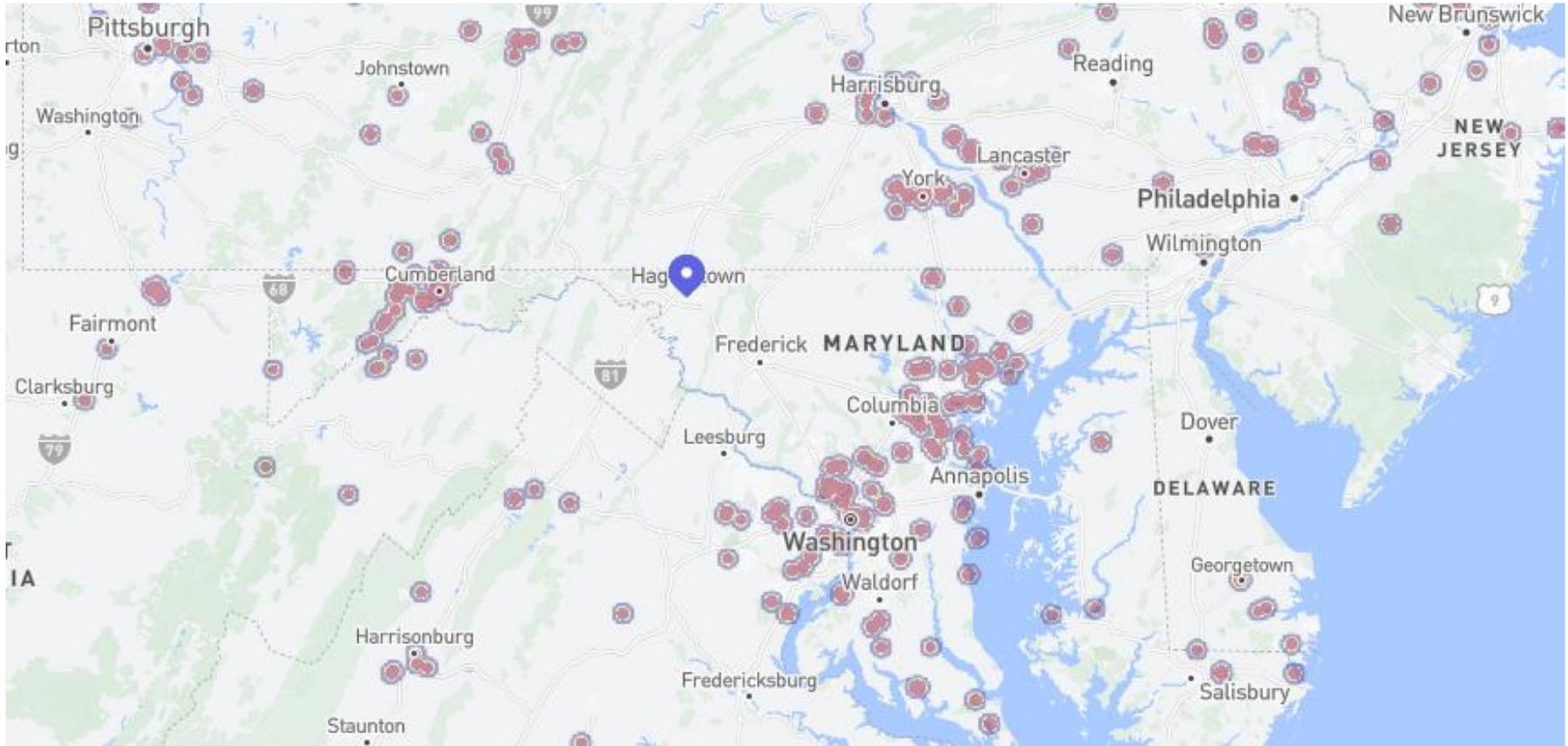
# Distance Traveled from Home

This chart uses the same data as the previous slide but delineates “local” as living within 20 miles of the stadium, in consideration of a local trade area inclusive of the I-81 corridor.





# Tourist Home Locations

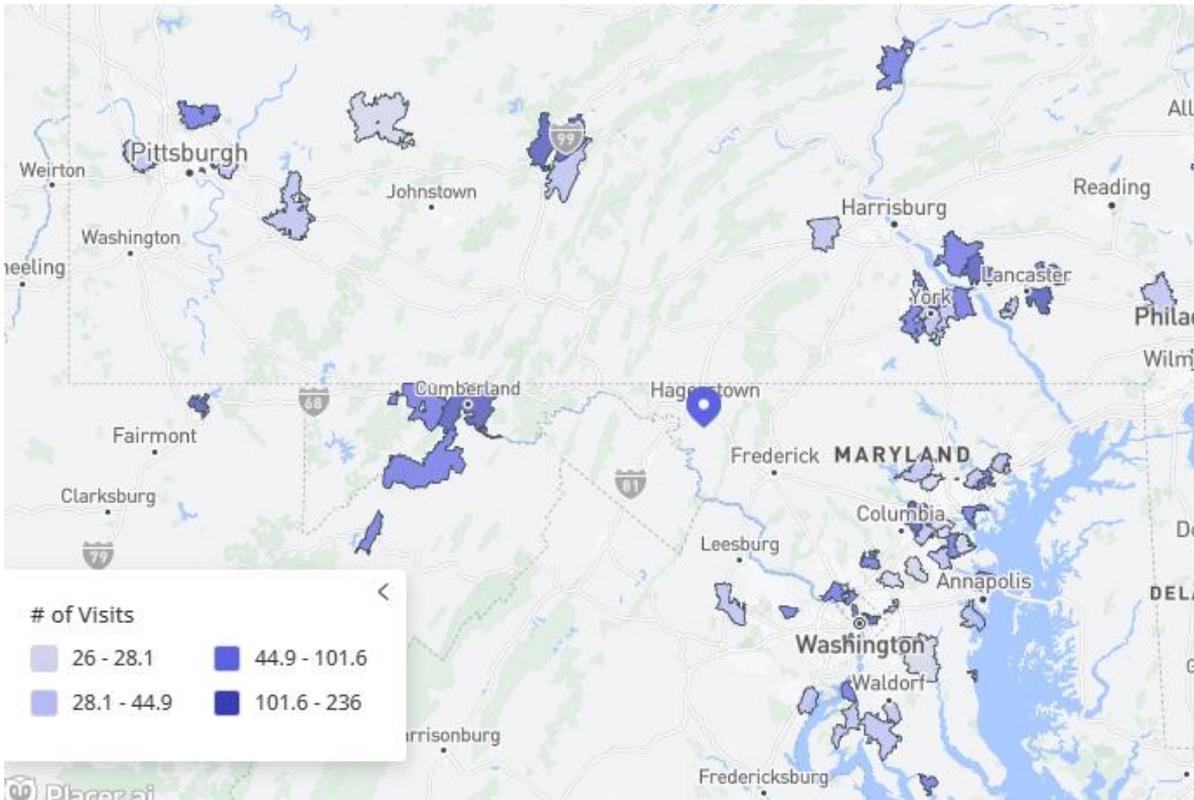


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# Tourist Zip Codes



<b>21502</b> Cumberland, MD	236 (2.6%)
<b>17552</b> Mount Joy, PA	153 (1.7%)
<b>17602</b> Lancaster, PA	136 (1.5%)
<b>20002</b> Washington, DC	130 (1.5%)
<b>21043</b> Ellicott City, MD	119 (1.3%)
<b>26505</b> Morgantown, WV	116 (1.3%)
<b>11788</b> Hauppauge, NY	106 (1.2%)
<b>21228</b> Catonsville, MD	106 (1.2%)



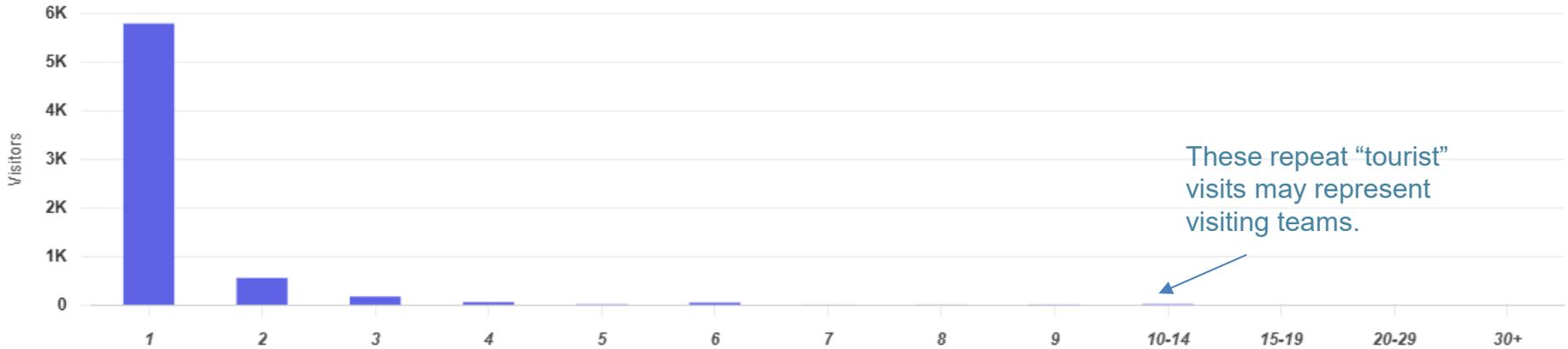
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# Tourist Visit Frequency

Tourists made an average of 1.28 visits (a slight increase over 2024) compared to 1.7 visits for all others.

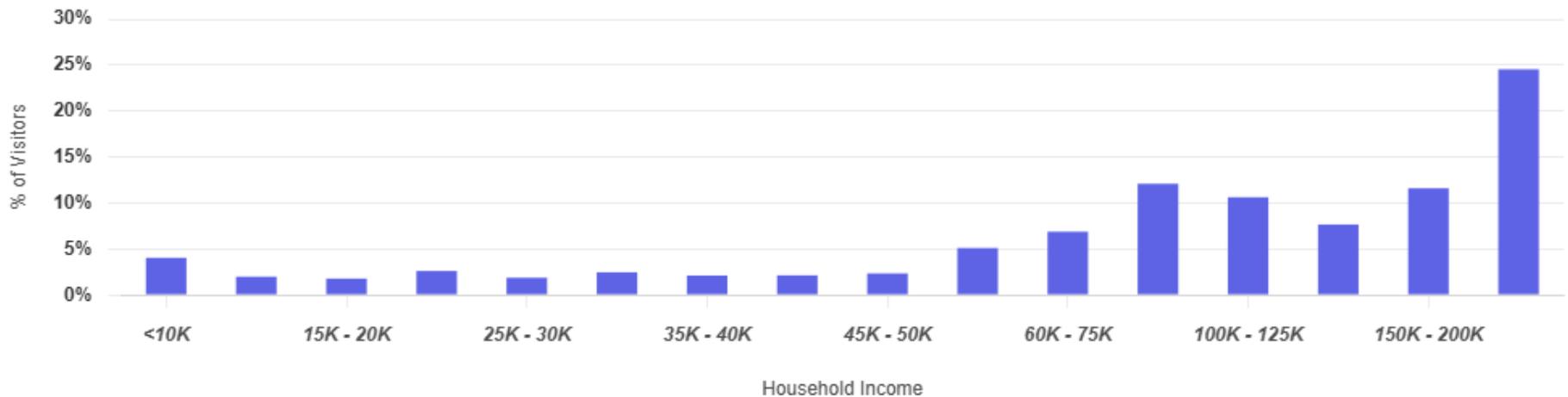




# Tourist Income

Average tourist income: \$153,000 versus \$101,000 for all visitors

Median tourist income: \$110,000 versus \$79,000 for all visitors



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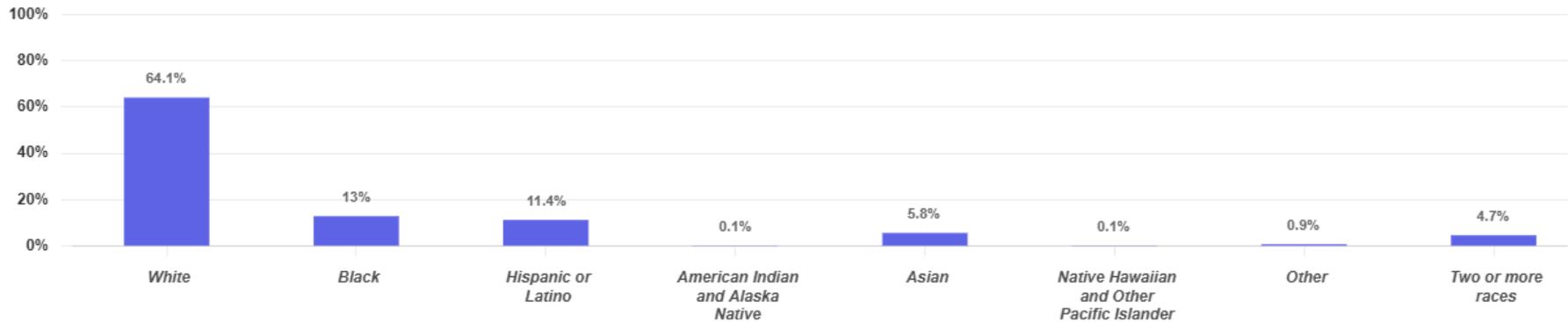
Convention and Visitors Bureau



# Tourist Ethnicity

Tourism ethnicity significantly more diverse than amongst overall visitors, although less diverse than in 2024.

- 36% of tourists are non-white
- 23% of all visitors are non-white





# Projected Tourist Spending

$$8,948 \text{ visits} \times \$273 \text{ per visit} = \$2,442,804$$

Placer.ai estimates \$273 spent per tourist visit and documented 8,948 tourist visits (an increase of 248 tourist visits from 2024).

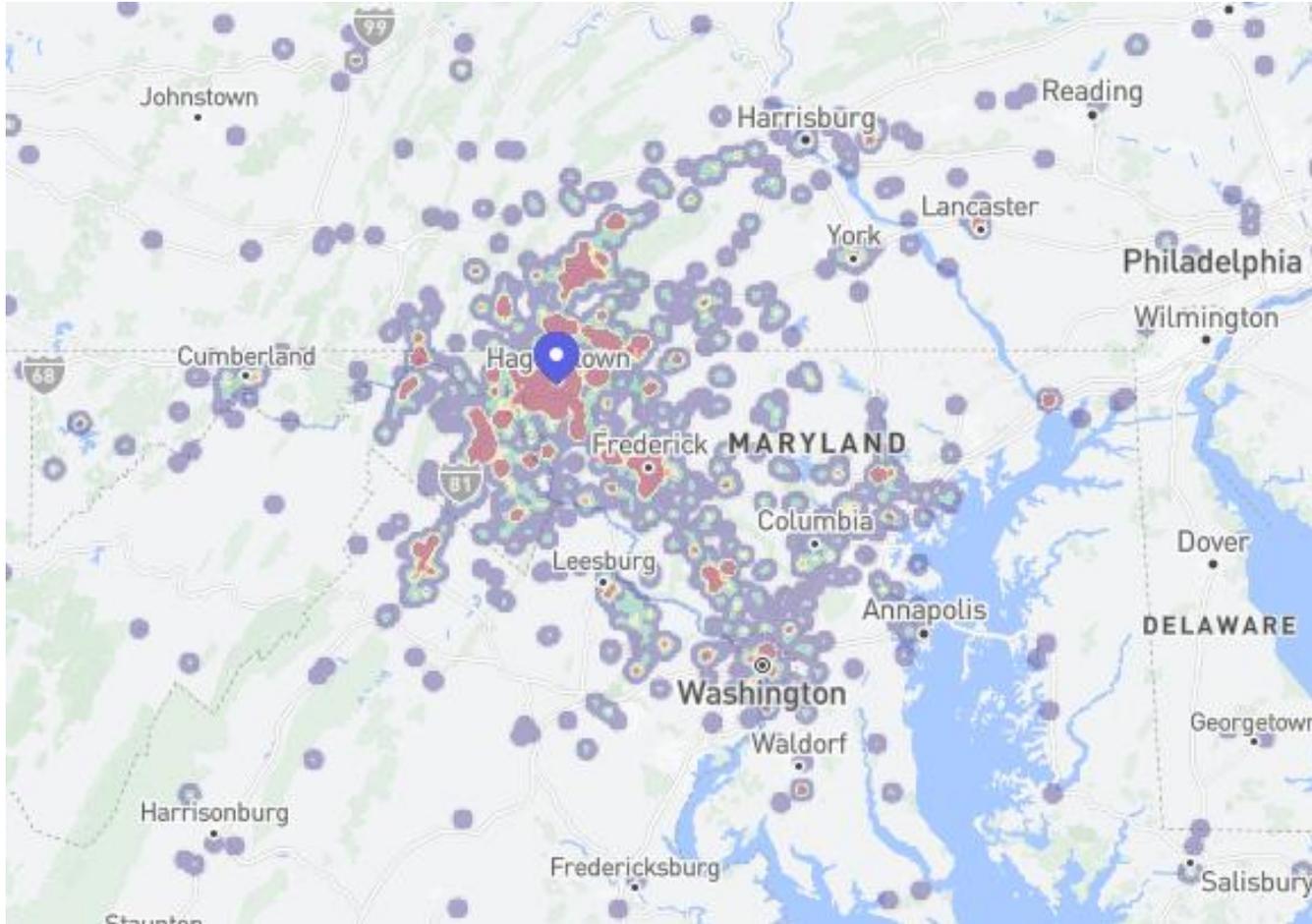
Additionally, we estimate 41,366 day trip visitors traveling 10-50 miles and spending an estimated \$75 per visit or \$3,102,450 during the 2025 season.

If there are local spending figures to use instead, we could update these projections.





# Work Location of Visitors



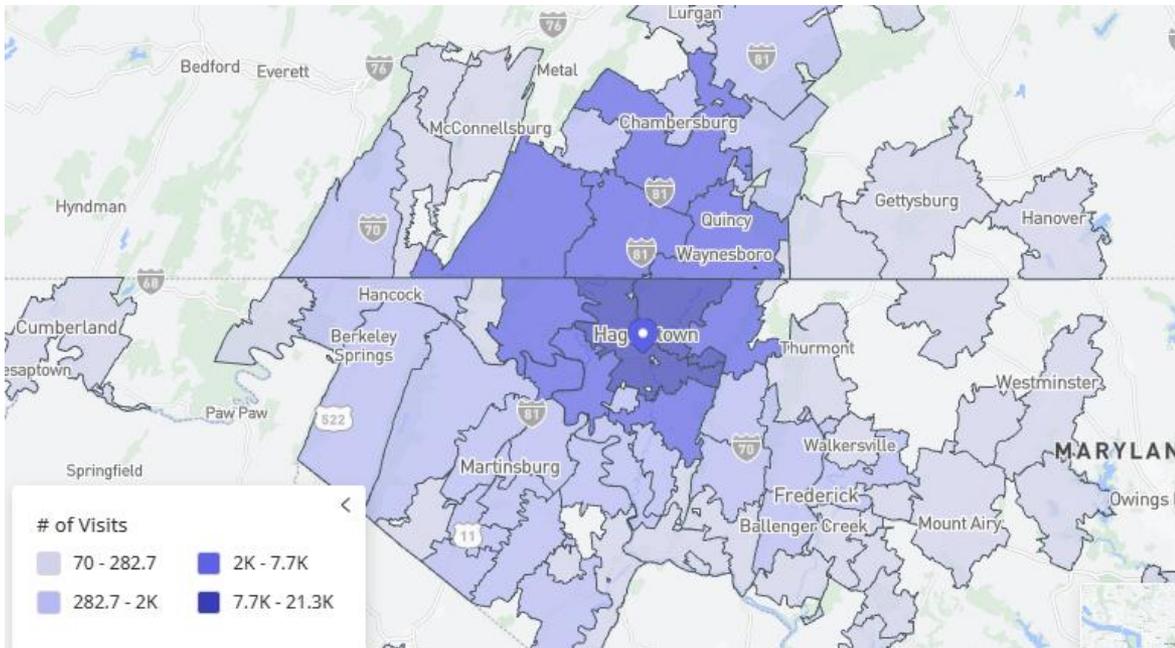
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# Work Location of Visitors

36.5% of visitors work in either the 21740 or 21742 zip code, an increase of 0.6% from 2024. This suggests that Hagerstown employers advertising at the stadium are reaching many of their current or prospective employees.



<b>21740</b> Hagerstown, MD	21.3K (19.9%)
<b>21742</b> Fountainhead-orchard Hills,...	17.9K (16.6%)
<b>17225</b> Greencastle, PA	6.9K (6.5%)
<b>17268</b> Waynesboro, PA	5.3K (4.9%)
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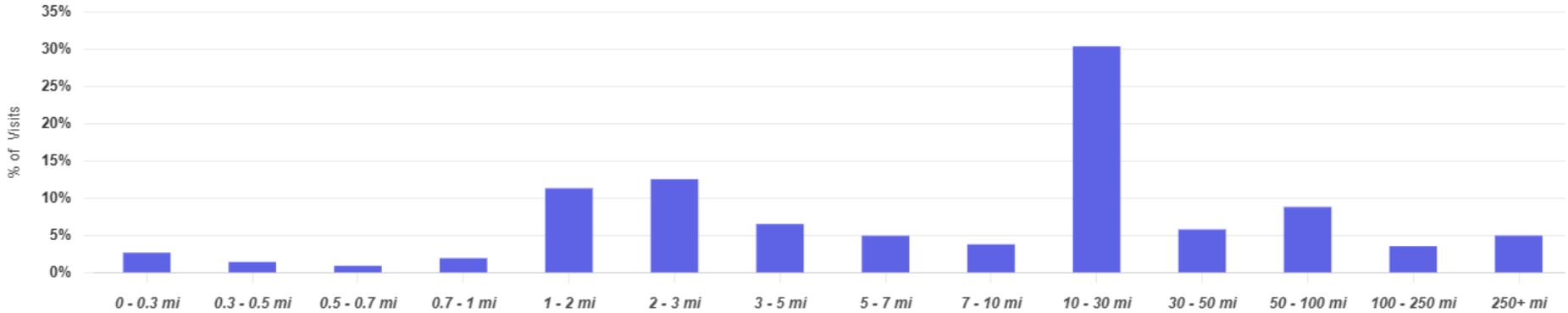




# Work Location of Visitors

31% of visitors work within 3 miles of the stadium.

Advertisers in the stadium have a captive audience of workers from across the region, including a significant portion (30%) working 10-30 miles from the stadium.



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# WellSpan Park Comparison (2025)

The chart compares Meritus Park visitation to WellSpan Park visitation during the 2025 season. WellSpan Park is located in York, PA and is home to the York Revolution.

Meritus Park outperforms the larger park at 0.51 visits per square foot.

Metric	WellSpan Park	Meritus Park
Total Visits	138,900	107,500
Total Visitors	88,100	62,800
Visit Frequency	1.71	1.57
Dwell Time	173 minutes	165 minutes
Visits per sq. ft.	0.39	0.51

