



November 27, 2019

The Honorable Larry Hogan  
Governor, State of Maryland  
State House  
100 State Circle  
Annapolis, Maryland 21401

Re: Submission of the Maryland Outdoor Recreation Economic (MORE) Final Report  
Agency: Maryland Department of Natural Resources  
Report Authority: Executive Order 01.01.2017.24 G (MSAR #11413)

Dear Governor Hogan,

In accordance with your Executive Order (01.01.2017.24), the Maryland Outdoor Recreation Economic (MORE) Commission was established in 2017 and has been working toward their mission of strengthening Maryland's outdoor recreation and heritage tourism economy.

The enclosed MORE Commission Final Report fulfills the requirement in the Executive Order that a final report be submitted to you for your review and consideration. Thank you for your leadership on this important environmental and economic initiative for Maryland.

Sincerely,

A handwritten signature in black ink, appearing to read "JHR".

Jeannie Haddaway-Riccio  
Secretary  
Department of Natural Resources

A handwritten signature in black ink, appearing to read "Kelly M Schulz".

Kelly Schulz  
Secretary  
Department of Commerce

Enclosure





# MARYLAND OUTDOOR RECREATION ECONOMIC COMMISSION FINAL REPORT

Maryland Department of Natural Resources  
Maryland Department of Commerce  
December 2019







Larry Hogan, Governor  
Jeannie Haddaway-Riccio, Secretary

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Layout by Annalise Kenney, Maryland Department of Natural Resources Office of Communications.

## Commission Members



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Co-chair



**Kelly Schulz,**  
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## I. Introduction

The broad geographic range of Maryland – from the Allegheny Mountains to the Chesapeake Bay, and ultimately to the Atlantic Ocean – provides outdoor recreation enthusiasts with a tremendous array of potential recreation experiences. Participation in outdoor recreation activities generates regional economic impacts through equipment and trip-related expenditures. This is relevant to many Maryland regions, but especially important to rural areas with abundant natural resource amenities, but limited economic opportunities. High-quality outdoor recreation opportunities also generate benefits to Maryland residents and nonresidents alike through more enjoyable experiences and enhanced quality-of-life.

Outdoor recreation is an economic engine in the state of Maryland. Equipment and trip expenditures associated with outdoor recreation support a wide range of industry sectors. These expenditures then generate “ripple effects” in the form of additional sales and employment throughout Maryland economies. In 2016, outdoor recreation-related expenditures generated \$14 billion in total sales, and sustained 109,000 jobs in the state of Maryland.<sup>1</sup> This static picture of Maryland’s outdoor recreation-based economy, while impressive, does not reflect the potential for increasing Maryland’s share of outdoor recreation-based economic impacts. Nationwide, the outdoor recreation economy generates \$887 billion in consumer spending; supports 7.6 million jobs; and provides \$125 billion in federal, state, and local tax revenue annually. Furthermore, recently released data shows that GDP for the nation’s outdoor recreation economy grew by 3.9% in 2017, outpacing the 2.4% growth of the overall U.S. economy.<sup>2</sup> Given that key outdoor recreation destinations in Maryland are within a four-hour drive of major metropolitan areas in the mid-Atlantic (New York, Philadelphia, and Washington) and



Outdoor Industry Association, 2019



Biking trails at Deep Creek Lake State Park (Jess Daddio)

the Midwest (Pittsburgh, Cleveland, and Columbus, Ohio), there is substantial potential for Maryland to increase its share of the outdoor recreation economy.

Aside from the impacts to regional economies, Maryland residents and nonresidents alike realize health and quality-of-life benefits through participation in outdoor recreation activities. Increased conservation and stewardship of our natural resources can ultimately result in more satisfying outdoor recreation experiences. In fact, by sacrificing time and money to take a trip, individuals reveal their economic valuation of the outdoor recreation experience. High-

<sup>1</sup> “Maryland’s Outdoor Recreation Economy.” *Outdoor Industry Association*, 2017, [outdoorindustry.org/state/maryland/](http://outdoorindustry.org/state/maryland/).

<sup>2</sup> “Outdoor Recreation.” *U.S. Bureau of Economic Analysis (BEA)*, [bea.gov/data/special-topics/outdoor-recreation](http://bea.gov/data/special-topics/outdoor-recreation).



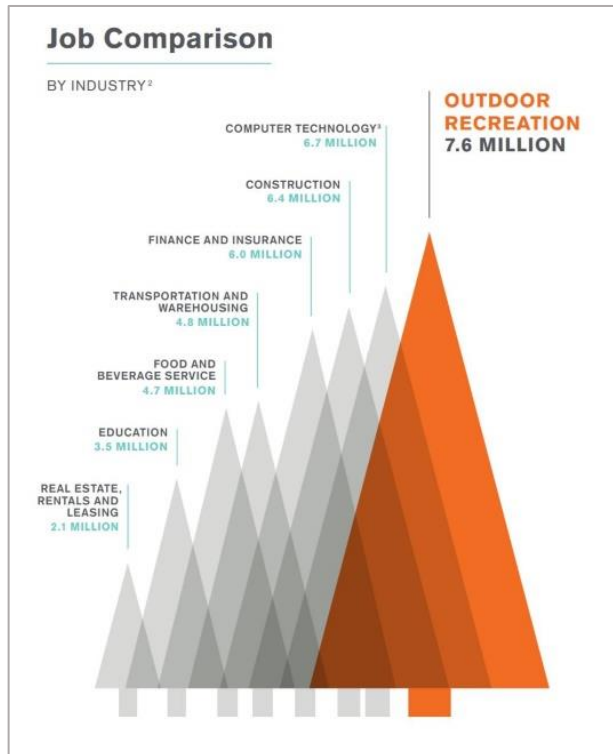
Cross-country skiing at Rocky Gap State Park (department photo)

quality recreational experiences attract individuals from long distances who are willing to incur large time and monetary costs to make the trip. The end results of such high-quality outdoor recreation experiences are both large regional economic impacts and a substantial value to the participant.

Outdoor recreation-related regional economic impacts and participant benefits are strongly tied to the quality of site-specific environmental amenities. If the quality of the environment is perceived to be inferior or if public access is

limited, individuals will choose other ways to spend their time and money. Due to the fact that outdoor recreation is affected by the availability and quality of public resources, such as fisheries, wildlife, and publicly-owned land/waterways, the effectiveness of state agencies in managing natural resources has a substantial influence on the regional economic impacts and participant benefits from outdoor recreation. Increasingly, local communities and states are recognizing their critical role, and as a result there has been a significant state-led movement to identify ways to promote and support the growing outdoor recreation economy.

At least 13 states have already established Offices of Outdoor Recreation (Colorado, Maine, Michigan, Montana, Nevada, New Hampshire, New Mexico, North Carolina, Oregon, Utah, Virginia, Washington, and Wyoming), and have worked together to develop and sign a set of Confluence Accords.<sup>3</sup> The accords outline common goals and strategies in the areas of economic development, education and workforce training, conservation and stewardship, and public health and wellness. Maryland was invited to participate as an observer during the development of these accords. The National Governors Association has now adopted an Outdoor Recreation Learning Network to help these states explore how outdoor recreation can improve their economy and public health, and increase conservation and stewardship efforts. The network allows states to share best practices to maximize the benefits of outdoor recreation their communities.



Outdoor Industry Association, 2019 (statistics from Bureau of Labor Statistics and Computing Technology Industry Association)

<sup>3</sup> "Confluence Accords." *Colorado Office of Economic Development & International Trade*, July 2018, [choosecolorado.com/programs-initiatives/outdoor-recreation-industry-office/](http://choosecolorado.com/programs-initiatives/outdoor-recreation-industry-office/).



## A. MORE Commission Executive Order

In recognition of Maryland’s potential for growing and harnessing the outdoor recreation and heritage tourism industry as an economic driver, the Maryland Outdoor Recreation Economic (MORE) Commission was established in 2017 by Governor Larry Hogan through Executive Order 01.01.2017.24. The MORE Commission is co-chaired by the Maryland Department of Natural Resources (DNR) and the Maryland Department of Commerce, and charged with strengthening Maryland’s outdoor recreation and heritage tourism economy. The MORE Commission is tasked with developing recommendations to enhance:

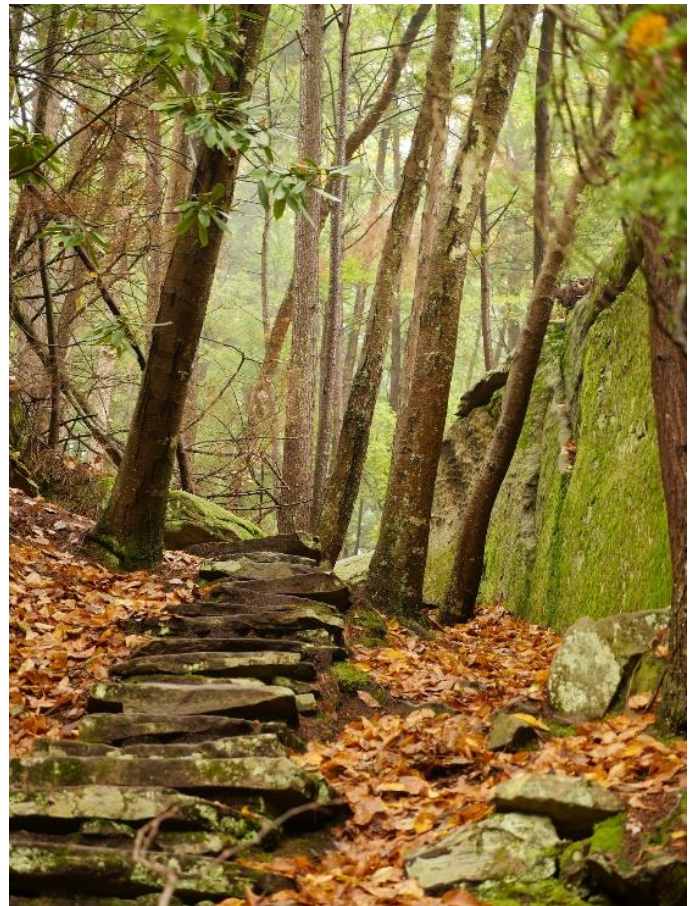
- The business climate for the outdoor recreation industry so as to retain and grow Maryland jobs and Maryland’s economy
- Maryland’s brand as a premier destination for outdoor recreation and heritage tourism
- Development of world-class outdoor and heritage tourism experiences
- Stewardship of Maryland’s natural, cultural, historical, and recreational resources
- Opportunities for workforce development and job creation in the outdoor recreation industry

## B. State of Outdoor Recreation & Heritage Tourism

### *Outdoor Recreation Participation*

Every five years the state, counties and the City of Baltimore update their Land Preservation, Parks and Recreation Plans, which provide information on local recreation trends, including demand for outdoor recreation opportunities within their respective jurisdictions. In the 2018 update of the State Land Preservation and Recreation Plan, DNR completed a statewide survey, asking residents for feedback regarding their participation, preferences in outdoor recreation activities, usage of state lands, concerns, and ideas for improving outdoor recreation experiences for all Marylanders.

This survey found that nine out of ten Marylanders get outside at state parks, forests, and natural resource management and wildlife areas, with 38% visiting at least once a month. Regardless of where they lived, most residents accessed public lands by automobile, and traveled less than an hour from home to do so. Trail-based recreation, park outdoor activities, and water recreation received high participation rates overall.



Trail at Swallow Falls State Park (Stephen Badger)

Over half of respondents indicated that the availability of parks, trails, outdoor recreation facilities, and outdoor education programs is “extremely important” to their household. The benefits of conservation and outdoor recreation received high importance ratings. Issues identified as “extremely important” included:

- Protecting the environment
- Promoting healthy active lifestyles
- Improving your quality of life
- Preserving cultural and historic resources
- Connecting people with nature
- Providing economic benefit to the state



Assateague Island beach (Brady Cooling)

While participation in outdoor activities and visitation to state lands is strong, less than one third of respondents indicated that existing state parks, trails, outdoor recreation facilities, and outdoor recreation programs are “completely” meeting the needs of their households. One in three respondents viewed improvements to trails as the key priority for enhancement. This was followed in importance by improving opportunities for park outdoor activities and then improvements to water recreation.<sup>4</sup>

### ***Management, Funding, and Promotion***

The primary providers of public outdoor recreation sites in Maryland are DNR, county, and municipal departments of recreation and parks, and the National Park Service (NPS). In total, these public agencies manage approximately 2,200 parks and open spaces. In 2017, Maryland State Parks welcomed over 14.5 million visitors, and NPS sites in Maryland welcomed 6.7 million visitors.

DNR manages over 490,000 acres of land, including 224 state parks, forests, and natural resource management areas that provide outdoor recreation opportunities for Marylanders. Assateague State Park is the most visited in

Maryland’s park system, and the only providing beachgoers ocean access. Savage River State Forest and Chesapeake Forest Lands are among the largest, providing hunting, camping, and hiking opportunities. Deep Creek Lake NRMA includes the largest man-made lake in Maryland at 3,900 acres, and is a premier boating and fishing destination. DNR lands provide over 150 designated fishing areas and 35 disabled accessible hunting areas. Units within DNR are responsible for all aspects of environmental management

***For every \$1 the state invests in state parks, \$29.27 is generated in economic activity.<sup>5</sup>***

<sup>4</sup> Maryland’s Land Preservation and Recreation Plan 2019-2023. (2019). [online]: [dnr.maryland.gov/land/Documents/LPRP\\_2019-2023/2019-2023\\_Maryland-LPRP.pdf](http://dnr.maryland.gov/land/Documents/LPRP_2019-2023/2019-2023_Maryland-LPRP.pdf)

<sup>5</sup> Dougherty, Rebecca and Al Goyburu. 2010 Maryland State Parks Economic Impact and Visitor Study. Maryland Office of Tourism Development, Department of Business and Economic Development. (2010) [online] [dnr.maryland.gov/publiclands/Documents/EconomicImpactStudy2010.pdf](http://dnr.maryland.gov/publiclands/Documents/EconomicImpactStudy2010.pdf)



and outdoor recreation, including land acquisition; resource conservation; regulation and enforcement; licensing of watercraft, hunters, and anglers; public education; maintaining historic structures; and operating parks and facilities. DNR administers the Land and Water Conservation Fund, Program Open Space, and other programs that support the conservation of land, and improvement of public outdoor recreation amenities.



Winter on the C&O Canal (Alex Keto)

NPS manages 18 sites in Maryland that provide outdoor recreation, and conserves lands and structures significant to American history and culture, including Ft. McHenry National Monument and Historic Shrine, C&O Canal National Historic Park, Assateague Island National Seashore, and Antietam National Battlefield. NPS also works closely with state and local partners to promote the Captain John Smith Chesapeake National Historic Trail and the Potomac Heritage National Scenic Trail. The U.S. Fish and Wildlife Service manages over 30,000 acres of land at the Chesapeake Marshlands National Wildlife Refuge Complex, which is open for recreational activities such as hiking, paddling, wildlife observation, and seasonal hunting. Additionally, NPS, through its Conservation and Outdoor Recreation Programs, offers cost sharing and technical assistance that align with its mission of protecting natural resources for the enjoyment, education, and inspiration of this and future generations, including trail assistance programs.

Heritage tourism sites are primarily managed by the Maryland Historical Trust (MHT), a unit of the Maryland Department of Planning. DNR, local agencies, and numerous nonprofit partners also play an important role. These sites are promoted and supported by the Maryland Office of Tourism Development (OTD) and the Maryland Heritage Areas Program, in coordination with Destination Management Organizations around the state.



Antietam National Battlefield (Chris Platt)



MHT is dedicated to preserving and interpreting the legacy of Maryland's past. Through research, conservation, and education, MHT assists the people of Maryland in understanding their historical and cultural heritage. It provides support for a wide variety of historic preservation-related activities, including property acquisition and rehabilitation, documentation and survey, heritage tourism development, and educational programs. MHT also administers the Maryland Heritage Areas Program. The program partners with nonprofits, public agencies, private individuals, and businesses to help conserve and interpret the best of Maryland's historical sites and towns, natural areas, and enduring cultural traditions. In doing so, they foster sustainable economic development through heritage tourism. All 23 counties and the City of Baltimore contain at least a portion of one of Maryland's 13 state-designated and locally managed heritage areas. The program offers financial assistance, including grants, loans, and tax credits.

OTD is an office within the Maryland Department of Commerce. OTD works to encourage consumer spending to benefit the citizens of Maryland through the tourism economy. The office promotes Maryland as a world-class travel destination for domestic and international visitors by touting the state's recreational, historical, and cultural assets. The state asks consumers to come to Maryland through a variety of owned and purchased communications channels such as its [website](#); annual publication, *Destination Maryland*, bi-monthly newsletter, Visit Maryland Now; social media channels; and paid advertising. OTD partners with DNR on the Fish and Hunt Maryland program and produces video and printed materials to drive consumers online where they can discover the wealth of opportunities that Maryland offers.



Wetland view along the Harriet Tubman Underground Railroad Scenic Byway  
(Stephen Badger)

The Maryland Department of Transportation (MDOT) administers the Scenic Byways Program and Recreational Trails Program, both of which contribute to outdoor recreation in the state. Maryland belongs to a longstanding network of national and state byways that include the most distinct and diverse roads in our nation. Maryland's Scenic Byway program enhances community pride, as well as visitor appeal, by encouraging the responsible management and preservation of the state's most scenic, cultural, and historic roads. Maryland's 18 designated byways encompass 2,487 miles of beautiful roads, and offer a taste of Maryland's scenic beauty, history, and culture. Many scenic byways feature nationally

significant themes: The Star-Spangled Banner, Harriet Tubman Underground Railroad, Religious Freedom, Chesapeake Country, Charles Street, Historic National Road, and the Catoclin Mountain National Scenic Byways.

The Recreational Trails Program is administered by MDOT State Highway Administration (SHA). The program matches federal funds with local funds or in-kind contributions to develop and maintain recreational land, water trails, and trail-related facilities for motorized and non-motorized recreational uses. These include pedestrian uses

(hiking, running, wheelchair use), bicycling, in-line skating, equestrian use, cross-country skiing, snowmobiling, off-road motorcycling, all-terrain vehicle (ATV) riding, four-wheel driving, or using other off-road motorized vehicles. Projects can be sponsored by a county, a municipal government, or a nonprofit agency.



Thomas Point Lighthouse in the Chesapeake Bay (Stephen Badger)

### **C. Maryland's World-Class Experiences**

Maryland offers diverse world-class recreational and heritage tourism experiences, from the Chesapeake Bay and beaches of the Eastern Shore to the mountains of western Maryland, connected by our common heritage, and accessed through a trail system second to none. These are the core outdoor identities of our state that attract international attention, and a part of our vision for the future.



Fair Hill Races (Stephen Schatz)

## Chesapeake Bay and Maryland Waterways

Maryland’s iconic Chesapeake Bay and numerous waterways are a part of our heritage, and a significant contributor to our economy. Maryland has more public water access sites than any other jurisdiction in the Chesapeake Bay Watershed, but the demand for access to the water for recreation is high and continues to grow.



Waterfowling on the Chesapeake Bay is a state pastime (Larry Hindman)

### Highlighted Activities

- Maryland offers a multitude of **water recreation options**, from the beaches of Assateague State Park, to the many rivers and creeks off of the Bay, to the mountain respite of Deep Creek Lake. Activities include power and sail boating, kayaking and other water paddle sports, jet skiing, and swimming.
- **Maryland fishing** is world-class, with opportunities in every season, including trophy trout in the Youghiogheny River; striped bass, catfish, and snakehead in the Bay and its waterways; and the “Largest Billfishing Tournament in the World” held annually in Ocean City.
- The Eastern Shore is the birthplace of American **waterfowling**, boasting the highest numbers and diversity of waterfowl in the eastern United States. Maritime heritage museums, working waterfronts, and waterfowl decoy festivals attract visitors to many of the historic towns along our coasts.
- Lower Eastern Shore marshes are the only place in the Western Hemisphere to **hunt sika deer** in the wild.

### Highlighted Projects

**Harriet Tubman Rural Legacy Area and City of Cambridge** — The establishment of the Harriet Tubman Underground Railroad State Park; the National Historical Park; Visitor Center; Byway; and Rural Legacy Area has generated a tipping point opportunity for conservation, business growth, and quality of life investments in Dorchester and Caroline counties. Coupled with domestic and international marketing, the Blackwater National Wildlife Refuge; the Hyatt Regency Chesapeake Bay Cambridge Conference Center; and expanding tour guide, retail, arts, and food business enterprises, the region is growing in recognition for its world-class natural wonders and heritage, all of which are drawing national and international attention.

**Baltimore City/Gwynns Falls/Masonville Cove** — Maryland’s outdoor recreation vision must include the City of Baltimore and its nationally significant parks, waterfront, and heritage. The city’s Olmstead-designed park system represents a critical green infrastructure that must be a cornerstone of ongoing urban renewal. Existing initiatives include the development of the planned Gwynns Falls Trail to Patapsco Valley State Park, and the restoration of the Masonville Cove Waterfront on the Middle Branch of the Patapsco River.

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## Mountains

The mountains of western Maryland are an outdoor enthusiast's paradise, where visitors can explore remote forested hills, scenic river valleys, and the Appalachian and Blue Ridge mountains. Deep Creek Lake is a driver of the local economy, and a year-round destination for residents and visitors to enjoy outdoor recreation, whether it's boating, leaf-peeping, or skiing.



Chimney Rock at Catoctin Mountain State Park (Retzer Cariaga)

### Highlighted Activities

- The Youghiogheny is Maryland's only Wild and Scenic River, providing **whitewater rafting, paddling, and world-class fishing** experiences.
- The **forested trails** of Wolf Den Run State Park, and Garrett County's state forests draw hunters and off-road vehicle enthusiasts.
- The Great Allegheny Passage winds through Maryland's mountains, giving bicyclists, hikers, and cross-country skiers some of the most **majestic views** in the east. Linking up to the Chesapeake and Ohio (C&O) Canal Towpath in the City of Cumberland, travelers can enjoy a continuous, **off-road trail experience** to the nation's capital, Washington, D.C.

### Highlighted Projects

**Cumberland/Wills Mountain State Park/Potomac River/C&O Canal**— Cumberland is poised to develop its brand as an outdoor recreation destination of regional significance. Situated at the confluence of the Great Allegheny Passage trail and the C&O Canal National Historical Park, the city has an opportunity to provide supporting infrastructure to become an outdoor town of national significance. In addition, the local tourism agency envisions new projects to further its brand by establishing access to Wills Mountain State Park, a 500-acre outdoor recreation backdrop to the city, and removing a low-head dam on the Potomac River to foster paddle sports and fishing.

**Wolf Den Run State Park**— Located in Garrett County, the first state park acquired and developed to support off-highway vehicle recreation was opened in 2019. The first phase completed includes 12 miles of scenic, rugged trails for a variety of motorized vehicles, as well as passive recreation uses. The 2,000-acre state park represents a bold new opportunity to attract recreationists, new supporting businesses, and manufacturers to the region and neighboring town of Kitzmiller.

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## Heritage

Maryland's rich history, alive with the landscapes and stories of our nation, is visible and accessible, and is a unique asset for tourists and residents alike. Maryland is ideal for robust experiences combining outdoor recreation and heritage activities.



Kayaking at Mallows Bay (Kim Hernandez)

### Highlighted Activities

- Visitors to the **City of Annapolis** may arrive by boat, experience a Baroque town plan by walking the streets, and leave with the knowledge that the Continental Congress signed the Treaty of Paris ending the Revolutionary War right here in town.
- Kayakers can paddle alongside **Fort McHenry**, where Francis Scott Key witnessed the Battle of Baltimore, and was inspired to pen *The Star-Spangled Banner*.
- Visitors flock to **Harriet Tubman Underground Railroad State Park** to learn about the history of the Underground Railroad, while also bringing over 100,000 additional visitors a year to the nearby **Blackwater National Wildlife Refuge**.
- Cyclists bike the crossroads of the U.S. Civil War at **Antietam and Monocacy national battlefields**, while equestrians ride at **Fair Hill Natural Resource Management Area**, a former DuPont estate, and one of the world's premier equestrian venues.

### Highlighted Projects

**Fair Hill NRMA 5 star three-day event**— Current investments in revitalizing the Fair Hill Special Event Zone are underway to support world-class turf and cross-country horse racing, including a 5-star event in October 2020. Continued investments in Fair Hill promise to put Maryland and Cecil County on the world stage as a premiere equestrian and outdoor recreation destination, preserving and enhancing the region's rural quality of life.

**Mallows Bay-Potomac River National Marine Sanctuary**— The first national marine sanctuary in the Chesapeake Bay watershed was recently designated in the Potomac River in Charles County. The sanctuary preserves over 100 half-submerged wooden vessels from World War I, dubbed "The Ghost Fleet," and has garnered national and international attention. The site has the potential to become a regional tourism and recreation destination.

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## Trails

Land and water trails offer a diversity of recreational opportunities, such as hiking or riding bikes, horses, and off-road vehicles; traveling between towns; enjoying historic landscapes; and getting out on the water by boat or paddleboard. The department has 1,447 miles of land trails spread throughout the state, and over 782 miles of state-designated water trails. The connectivity of Maryland's trails help solidify the marketing message of Maryland's trail system.



Patapsco Valley State Park (Stephen Badger)

### Highlighted Activities

- Maryland hosts several **federally recognized trails**, including the Captain John Smith Chesapeake National Historic Trail, Star Spangled Banner National Historic Trail, Appalachian National Scenic Trail, Potomac Heritage National Scenic Trail, and the Washington-Rochambeau Trail.
- **C&O Canal National Historic Park** is Maryland's most visited national park, with approximately 5 million visitors every year. In 2017, more than 420,000 of these visitors came to the new headquarters in Williamsport, spending nearly \$6 million in the local community, and supporting more than 800 local jobs.
- The **Baltimore–Annapolis Trail** links to the Baltimore/Washington International (BWI) Thurgood Marshall Airport Trail, and now the Washington-Annapolis Trail, a favorite of local residents.
- Maryland has several extensive **regional trails** such as the Great Allegheny Passage, Eastern Continental Divide, East Coast Greenway, and National Capital Trail.

### Highlighted Projects

**Frederick Douglass Rail Trail** — Rail trails are one of the most popular forms of trail-based recreation, and are considered a valued community amenity, a source of safe transportation, and a travel destination. Talbot County and DNR are undertaking a study to determine the feasibility of converting a former rail line into a rail trail, connecting the town of Easton to Tuckahoe State Park. The former 32-mile rail line passes in close proximity to the birthplace of the region's native son, Frederick Douglass, and the future Frederick Douglass County Park on the Tuckahoe River.

**Garrett County Eastern Continental Divide Loop Trail**— The region's scenic beauty, waterways, state parks, cabins, rental homes, campgrounds, and towns are primed to support a trail-based nature and heritage tourism industry, and quality of life for relocating professionals looking for less crowds and more nature. Garrett County may need additional capital investment to utilize its significant public land base to establish a hiker/biker trail system of regional renown.

**Patapsco Valley State Park/Ellicott City/Baltimore City** — The Patapsco Valley harbors 32 miles of protected forest and river, from the Town of Sykesville to Baltimore City. Patapsco Valley State Park currently serves about 1.5 million visitors annually, and the new Patapsco Valley Heritage Greenway is attracting new investment in the historically rich valley considered the birthplace of the industrial revolution. The development of a trail system connecting these communities to high-quality outdoor recreation and heritage tourism is almost complete, and could use additional support.

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## II. Stakeholder Engagement

The MORE Commission first convened in March 2018, and subsequently held bi-monthly regional meetings and listening sessions around the state. These meetings provided insight into the unique recreational and heritage tourism experiences in each region. They also provided a forum for engagement with local stakeholders to gain perspective on opportunities and barriers to growing the outdoor recreation and heritage tourism economy in their respective communities. Each of these meetings involved tours, presentations, and panels of local experts spanning the fields of tourism, parks management, small business, health, recreation, history, and conservation. Meeting agendas and minutes are available at [dnr.maryland.gov/Pages/more/home.aspx](http://dnr.maryland.gov/Pages/more/home.aspx).

**May 14, 2018** - Western Region, Woodmont Natural Resource Management Area

**July 25, 2018** - Central Region, North Point State Park

**Sept. 13, 2018** - Eastern Shore, Harriet Tubman State Park

**Jan. 29, 2019** - Southern Region, Jefferson Patterson Park

**April 15, 2019** - North-Central Region, Fair Hill NRMA

**July 8-9, 2019** - Far-Western Region, Deep Creek Lake State Park

Through the stakeholder engagement process, a number of common themes emerged. Maryland has done much to preserve and develop its outdoor recreational resources, but we can do more to steward and encourage the use of these resources, support businesses, and promote the outdoor recreation sector to residents and out-of-state visitors. Areas of focus for the MORE Commission include:

### *Small Business Assistance*

Small businesses focused on outdoor recreation face barriers to entry. There is a need to better assist these businesses through all stages of development, including start-up, navigating permits and government processes, insurance and liability concerns, and marketing.

### *Workforce Training/Apprenticeships*

Many outdoor recreation industries such as boating, maritime trades, and outfitters are facing a shortage of skilled workers. There is a need for increased apprenticeship programs and connections with community colleges and vocational schools to provide skills and training needed to support a growing outdoor recreational economy.

### *Public-Private Partnerships*

Public-private partnerships are key to both supplementing government capacity and encouraging innovation. There is a need to support and streamline the process for private vendors and organizations to provide services and expand upon recreational and heritage tourism opportunities on public recreational lands.

### *Conserving Natural Resources*

There is a need to ensure the health of our lands and waters as the foundation of our outdoor recreation economy. Water quality is paramount to the enjoyment and industry of water-based recreation; and accessible green spaces, both rural and urban, are vital to the health of our citizens. Program Open Space is an important tool to

preserving and creating new recreation lands, but new sustainable funding streams may be needed to develop and maintain our lands, waters, and infrastructure.



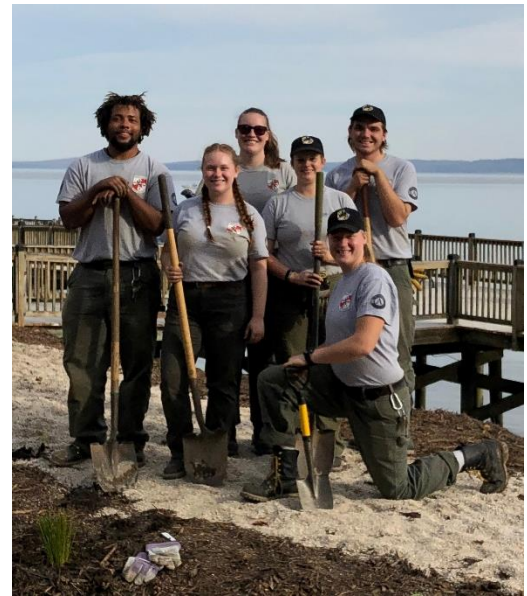
St. John's Rock Off-road Vehicle trail in Garrett County (department photo)

### *Connectivity/Trails*

Establishing trails and connections between recreational areas and communities promotes economic development, and enhances the quality of life for Maryland's citizens. These connections should be promoted and supported throughout the state, especially when considering new infrastructure development such as bridges and roads.

### *Engagement*

Youth are the next generation of recreational users and environmental stewards, but are increasingly disconnected from the outdoors, and our state's heritage. There is a need to support existing programs that engage, recruit, and retain young people to ensure a lifetime of outdoor recreation and environmental literacy. Investments in programs like the Conservation Jobs Corps and Maryland Conservation Corps are important to engage audiences in outdoor recreation who often have the least access to outdoor resources. Women are showing increased interest in outdoor recreation, including hunting and fishing, yet at the same time hunting and license sales have been decreasing in Maryland and across the country. It is a perfect time to align with groups and adventure organizations that speak to women directly, such as Becoming an Outdoors Woman; Shoot Like A Girl; Ladies, Let's Go Fishing; and International Women Flyfishers, which encourage women and other non-traditional audiences to get more involved in the outdoors.



Maryland Conservation Corps working on a shoreline restoration project (department photo)

### *Water Access*

The Chesapeake Bay and our state waterways are key providers of recreation, commercial use, and a combined heritage. However, there are Maryland communities located next to the water that still have poor water access. While Maryland has made progress on this front, there is a need to provide increased and equitable access to the water. There is also a need to maintain maritime infrastructure and open channels in the face of erosion, sedimentation, and climate impacts. There is a need to develop a gateway destination where visitors can go to learn about the Chesapeake Bay and its heritage and recreation opportunities, and can then explore its beauty.

### *Four Seasons Visitation*

Promoting outdoor recreation and heritage tourism on a year-round basis is key to ensuring that our communities benefit economically. There is a need to identify and promote off-peak recreational opportunities with heritage tourism, and market these opportunities to a wider audience.

### **III. Commission Recommendations**

The MORE Commission submitted an Interim Report to the Governor in December 2018 (see Appendix C). The Commission endorsed three interim recommendations:

1. **Evaluate establishing a State Office of Outdoor Recreation**
2. **Become a state signatory to the Confluence Accords**
3. **Support establishing a Chesapeake Bay National Recreation Area**

Subsequently, the MORE Commissioners formed and headed four subcommittee workgroups:

Business Climate, Workforce Development, and Job Creation; Stewardship; Branding; and Enhanced Development of World-Class Outdoor and Heritage Tourism Experiences in Maryland. These workgroups tapped the expertise from a wide range of business, government, nonprofit, and community members (see Appendix D), and their input was integral in the development of the Commission's final recommendations:

#### **A. Enhancing and Strengthening the Business Climate**

1. Conduct a study that inventories and assesses current in-state regulations, policies, and programs that impact the outdoor recreation economy, and identifies both in-state and out-of-state best practices. Include a return on investment analysis, and set implementation priorities based on MORE Commission recommendations for marketing, stewardship, and in support of the development of world-class visitor experiences.
2. Assess opportunities and work with counties to support outdoor recreation businesses through the Opportunity Zone Enhancement Program, and More Jobs For Marylanders Program.
  - a. Enhance access and assistance for new business development and expansion of existing businesses through resources such as Maryland Business Express, the Opportunity Zone Information Portal, and available incentives.
  - b. Determine where multiple incentive zones overlap. Conduct a case study to identify one or more locations that maximize the opportunity to establish outdoor recreation micro-manufacturing hubs. The study will assess geographic location, quality of life, workforce, financial, and other factors necessary to establish the hub and develop the manufacturing business recruitment strategy, including a list of viable candidates.
3. Develop a recruitment plan to attract outdoor lifestyle manufacturers, such as kayak, boat, bicycle, and ATV companies to locate and grow in Maryland. Showcase Maryland's outdoor recreation lifestyle as an active recruitment tool when attracting non-recreational businesses to the state through development of promotional materials for use by industry.
4. Assess emerging outdoor recreational use sectors such as birding and sika deer hunting, and develop economic impact studies in conjunction with local universities.
5. Assess barriers and conduct trainings to further the inclusion of diverse and minority-owned natural resource and outdoor recreation businesses through state certification.
6. Create a Maryland Outdoor Industry Leadership Summit to gather stakeholders for education, training, partnership development, and advocacy.



## **B. Enhancing Workforce Development and Job Creation Opportunities**

1. Conduct a study to inventory the state's existing outdoor recreation businesses, and to identify industry sectors with job-growth potential based on the implementation of the MORE Commission's marketing, visitor experience development, and stewardship recommendations. Coordinate with the Governor's Workforce Development Board.
2. Assess in-state and out-of-state workforce development platforms, high school and higher education curriculum, certificate programs, apprenticeships, trade schools, etc. to identify opportunities for outdoor recreation and historic preservation training and degree programs.
3. Create a toolkit to promote careers in the Outdoor Recreation Industry in coordination with the Maryland Workforce Expressway. The toolkit would identify educational opportunities, provide job application tutorials, and an inventory of public and private sector job vacancies.
4. Strengthen the outcomes of the Maryland Conservation Corps, Conservation Jobs Corps, and Veterans Conservation Corps through agreements with partners to provide youth from traditionally underrepresented backgrounds with apprenticeships and other workforce career experience in natural resource professions.
5. Work with the Department of Housing and Community Development to initiate the Recreation Industry's Live Near Your Work program to build and sustain affordable housing for the recreation industry workforce.

## **C. Enhancing Maryland's Brand as a Premier Destination**

1. Extend Maryland's marketing message by exploring best practices and funding strategies of out-of-state destinations that excel at marketing their outdoor resources.
2. Identify potential funding sources for a campaign to highlight four season outdoor recreation use, and associated outdoor recreation businesses. Highlight off-season activities such as birding and year-round fishing experiences. Continue to build on the water trails system in the marketing positioning of Maryland as having a "Trail System Second to None."
3. Work to better coordinate marketing and development programs supporting outdoor recreation and heritage tourism, and assess opportunities for grant programs to include state agencies as funding recipients.
4. Deputize Outdoor Recreation Ambassadors. Work with business owners and associates to serve as ambassadors to create a word-of-mouth/social media campaign. Cross promote amongst partners to amplify messages.
5. Work with local guides and outfitters to maximize resources such as implementing cooperative advertising programs.
6. Identify an organization that can coordinate with businesses to provide shared resources (e.g., photography) that are needed for outdoor promotion, so that costs can be shared among the partners.

## **D. Enhancing Recreational and Heritage Tourism Experiences**

1. Conduct customer service surveys to assess the quality of experience and the needs of outdoor recreation users. Focus on engaging diverse constituents to ensure a systematic commitment to equitable access and addressing the needs of diverse communities.

2. Provide training opportunities to outfitters and service providers on how to create better customer/user experiences.
3. Assess, develop, and market transportation from urban corridors to outdoor recreation and heritage tourism destinations for hikers, bikers, and boaters.
4. Improve visitor experiences by providing more information about available experiences and better directing people to central gateway locations. Continue to improve and develop mapping, wayfinding, and interpretation for outdoor recreation areas, activities, and heritage sites.
5. Implement an Outdoor Equity Program that provides funding to help eliminate barriers for low-income rural and urban youth and for cross-cultural communities to access outdoor recreation and education programs.
6. Develop and implement a Maryland “Outdoor Town” program to provide targeted planning and funding assistance to “Gateway” municipalities to develop and grow their outdoor recreation and heritage-based economies. The program could include: technical assistance, community engagement, planning and investing in improving outdoor and heritage recreation experiences, improving municipal infrastructure, attracting and supporting new and existing businesses, workforce development, and beautification projects.

## **E. Stewarding Maryland’s Natural, Cultural, Historical and Recreational Resources**

1. Increase the delegated procurement authority for DNR to reduce the critical maintenance backlog on public lands. Consider funding in-house construction crews to work on public land critical maintenance projects.
2. Streamline the DNR lease agreement process to support public/private partnerships that could:
  - a. Develop leasing models in cooperation with the Department of General Services in order to streamline the lease procurement process.
  - b. Assess potential for investment in the restoration and beneficial reuse of historic structures, with a focus on public-private partnerships.
  - c. Increase the delegated authority for concessionaire contracts to DNR in order to streamline the process and encourage private investment in outdoor recreation services on public lands and waterways.
3. Identify opportunities to expand the capacity of volunteer stewardship assistance by increasing volunteer management infrastructure, exploring new roles and opportunities for volunteers, and developing accessible volunteer opportunities to engage with youth and families.
4. Work with MHT to make the Maryland Historic Revitalization Tax Credit Program available to tenants of historic properties owned by DNR.
5. Trail Initiatives
  - a. Task DNR and MDOT to identify and collaborate on the implementation of community-based trail projects that support local quality of life and tourism. Develop high-level feasibility studies of long-distance trails to identify additional needs in these larger trail networks.
  - b. Prioritize and implement trail projects identified in DNR’s Statewide Trails Plan.
  - c. Explore opportunities for holding a statewide trail summit to bring together state, local, and nonprofit trail and recreational user groups.
  - d. Assess recreational trail opportunities in state forests.
  - e. Assess opening MDOT SHA’s Recreational Trails Program grant funding to businesses, in order to encourage more public-private partnerships.



# The State of Maryland

## Executive Department

### EXECUTIVE ORDER

01.01.2017.24

#### Maryland Outdoor Recreation Economic Commission

WHEREAS, Maryland's treasured and diverse natural, cultural, historical and recreational resources, from the Atlantic Ocean to the Chesapeake Bay to the Appalachian Mountains, are a significant part of the State's brand identity, economy and quality of life;

WHEREAS, The outdoor recreation economy in Maryland generates 109,000 direct jobs, \$951 million in state and local tax revenue, \$4.4 billion in wages and salaries and \$14 billion in consumer spending;

WHEREAS, Providing improved access to world-class outdoor activities, such as hiking, biking, horseback riding, paddling, boating, fishing, hunting, camping, swimming, wildlife-viewing, and visitation to historic sites, will support economic investment in the State's outdoor recreation industry and nature and heritage tourism economies;

WHEREAS, Careful and thoughtful stewardship of the State's natural heritage and rich history is a critical responsibility necessary to protect the quality of life of its citizenry and future generations; and

WHEREAS, Greater engagement of the outdoor recreation industry as well as other private and public stakeholders will strengthen the State's efforts to attract and retain businesses that rely on and value Maryland's tremendous outdoor and heritage resources;

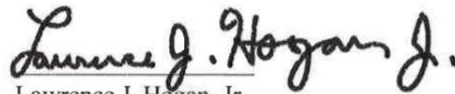
NOW, THEREFORE, I, LAWRENCE J. HOGAN, JR., GOVERNOR OF THE STATE OF MARYLAND, BY VIRTUE OF THE POWER INVESTED IN ME BY THE CONSTITUTION AND THE LAWS OF MARYLAND, DECLARE THE FOLLOWING:



- A. Established. There is hereby established the Maryland Outdoor Recreation Economic Commission to advise and make recommendations to the Governor on actions that will strengthen the outdoor economy and Maryland.
- B. Membership. The Commission shall be comprised of seventeen (17) members to be appointed by the Governor and who will serve at the pleasure at the Governor, including:
  - 1) The Secretary of the Department of Natural Resources or the Secretary's designee;
  - 2) The Secretary of the Department of Commerce or the Secretary's designee;
  - 3) Representatives from three companies within Maryland's outdoor recreation manufacturing and retail industries;
  - 4) Representatives from three companies representing small businesses that provide outdoor recreation services;
  - 5) Representatives from three nonprofit organizations related to outdoor recreation;
  - 6) Three local elected officials; and
  - 7) Three citizen members with experience in economic development, planning, tourism, and/or marketing.
- C. Chair. The Commission shall be co-chaired by the Secretary of the Department of Natural Resources and the Secretary of the Department of Commerce. Their designees may, at the request of the Secretaries, serve as acting co-chairs.
- D. Committees. The Commission may, in its discretion, establish working committees to support its mission, drawing committee members from any agency or department of State government or private / non-profit organization.
- E. Staff. The Department of Natural Resources and the Department of Commerce shall provide administrative and staff support to the Commission.
- F. Purpose. The Commission shall develop recommendations and an action plan to strengthen and enhance:

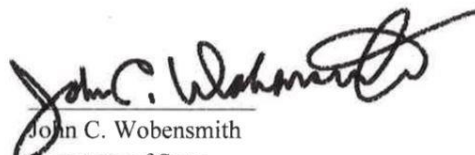
- 1) The business climate for the outdoor recreation industry so as to retain and grow Maryland jobs and Maryland's economy;
  - 2) Maryland's brand as a premier destination for outdoor recreation and heritage tourism;
  - 3) Development of world-class outdoor and heritage tourism experiences;
  - 4) Stewardship of Maryland's natural, cultural, historical, and recreational resources; and
  - 5) Opportunities for workforce development and job creation in the outdoor recreation industry.
- G. The Commission shall provide an interim report to the Governor by December 1, 2018 and a final report by December 1, 2019.

Given Under My Hand and the Great Seal of the State of Maryland in the City of Annapolis, this 13th Day of October, 2017.

  
Lawrence J. Hogan, Jr.  
Governor

ATTEST:



  
John C. Wobensmith  
Secretary of State

## Appendix B: BEA Outdoor Recreation Economic Data for Maryland

Table 1. Outdoor recreation value added by activity, thousands of dollars

	2012	2013	2014	2015	2016	2017
Total Outdoor Recreation	6,145,402	6,132,477	6,360,139	6,775,350	6,957,736	7,058,582
Total Core Outdoor Recreation	2,798,997	2,845,745	2,901,325	3,008,076	3,021,368	3,128,145
<b>Conventional Outdoor Recreation</b>	<b>1,763,933</b>	<b>1,787,135</b>	<b>1,807,692</b>	<b>1,896,415</b>	<b>1,887,260</b>	<b>1,929,167</b>
Bicycling	19,268	20,048	20,304	20,551	22,228	20,910
Boating/Fishing	376,638	379,907	391,728	412,347	425,365	444,438
Canoeing/Kayaking	10,278	10,594	11,135	11,965	12,662	13,159
Fishing (excludes Boating)	31,708	31,905	31,805	33,219	33,278	31,317
Sailing	38,063	37,951	40,269	42,056	44,866	46,454
Other Boating	296,589	299,457	308,519	325,106	334,559	353,509
Climbing/Hiking/Tent Camping	37,356	39,282	40,456	42,464	42,793	42,717
Equestrian	75,147	78,326	87,164	89,683	93,989	101,299
Hunting/Shooting/Trapping	113,975	124,701	113,973	118,922	107,133	110,309
Hunting/Trapping	69,694	74,194	67,265	70,148	57,641	58,734
Shooting (incl. Archery)	44,281	50,507	46,708	48,774	49,492	51,575
Motorcycling/ATVing	75,594	71,036	75,739	79,985	80,606	79,977
Recreational Flying	10,674	11,277	11,708	11,983	12,609	13,547
RVing	143,500	149,955	154,873	158,727	159,080	160,930
Snow Activities	35,844	34,282	37,288	39,223	39,098	38,592
Skiing/Snowboarding	23,041	22,453	24,326	25,512	25,476	25,397
Other Snow Activities (incl. Snowmobiling) <sup>1</sup>	12,803	11,829	12,963	13,712	13,622	13,195
Other Conventional Outdoor Recreation Activities	146,517	149,912	154,964	166,843	169,926	171,916



Other Conventional Air and Land Activities <sup>2</sup>	102,913	105,266	107,753	114,891	118,630	121,353
Other Conventional Water Activities <sup>3</sup>	43,604	44,646	47,211	51,952	51,296	50,563
Multi-use Apparel and Accessories (Conventional) <sup>4</sup>	729,421	728,409	719,495	755,687	734,433	744,530
<b>Other Outdoor Recreation</b>	<b>1,035,064</b>	<b>1,058,610</b>	<b>1,093,633</b>	<b>1,111,661</b>	<b>1,134,108</b>	<b>1,198,978</b>
Amusement Parks/Water Parks	73,837	75,259	78,123	83,781	89,498	98,341
Festivals/Sporting Events/Concerts	208,934	222,704	244,133	238,371	257,734	271,629
Field Sports	44,405	44,242	46,671	49,154	50,575	50,170
Game Areas (includes Golfing and Tennis)	233,949	236,195	239,004	250,483	264,887	273,773
Guided Tours/Outfitted Travel	198,295	198,144	199,323	187,960	169,815	195,005
Air and Land Guided Tours/Outfitted Travel	94,956	93,953	99,088	98,525	94,379	100,584
Water Guided Tours/Outfitted Travel (incl. Boating and Fishing Charters)	103,340	104,191	100,235	89,434	75,437	94,421
Productive Activities (incl. Gardening)	104,425	109,322	110,991	114,611	115,723	123,150
Other Outdoor Recreation Activities <sup>5</sup>	127,708	126,226	130,985	141,638	141,388	141,713
Multi-use Apparel and Accessories (Other) <sup>4</sup>	43,511	46,516	44,404	45,663	44,488	45,197
<b>Supporting Outdoor Recreation</b>	<b>3,346,404</b>	<b>3,286,732</b>	<b>3,458,813</b>	<b>3,767,274</b>	<b>3,936,369</b>	<b>3,930,437</b>
Construction	91,236	99,826	113,326	116,288	133,178	144,738
Local Trips <sup>6</sup>	464,252	458,928	487,505	511,793	519,886	519,603
Travel and Tourism <sup>7</sup>	2,269,997	2,131,602	2,208,366	2,408,634	2,516,148	2,461,249
Food and Beverages	639,098	502,305	522,251	556,821	559,330	541,172
Lodging	663,791	644,135	653,164	726,958	764,519	675,922
Shopping and Souvenirs	369,939	364,399	367,599	378,540	379,877	375,325
Transportation	597,169	620,762	665,352	746,315	812,422	868,830
Government Expenditures	520,919	596,375	649,618	730,559	767,157	804,847

Federal Government	58,625	66,554	63,794	63,833	65,741	63,781
State and Local Government	462,294	529,821	585,824	666,727	701,415	741,066

**Source:** Bureau of Economic Analysis, Outdoor Recreation Satellite Account, U.S. and Prototype for States, 2017  
([bea.gov/data/special-topics/outdoor-recreation](http://bea.gov/data/special-topics/outdoor-recreation))

**Note:** Estimates may not add to totals because of rounding. Last updated September 20, 2019.

**Source:** U.S. Department of Commerce, Bureau of Economic Analysis

1. Consists of dog mushing, sleighing, snowmobiling, snow shoeing, snow tubing.
2. Consists of air sports, driving for pleasure, geocaching/orienteering/rock hounding, ice skating, inline skating, land/sand sailing, races, running/walking/jogging, skateboarding, and wildlife watching/birding.
3. Consists of boardsailing/windsurfing, SCUBA diving, snorkeling, stand-up paddling, surfing, tubing, wakeboarding, water skiing, and whitewater rafting
4. Consists of backpacks, bug spray, coolers, general outdoor clothing, GPS equipment, hydration equipment, lighting, sports racks, sunscreen, watches, and other miscellaneous gear and equipment.
5. Consists of agritourism, augmented reality games, beachgoing, disc golf, hot springs soaking, kite flying, model airplane/rocket/UAV, paintball, photography, stargazing/astronomy, swimming, therapeutic programs, water polo, yard sports.
6. Trip expenses less than 50 miles away from home, including food and beverages, lodging, shopping and souvenirs, and transportation.
7. Travel and tourism expenses in the Outdoor Recreation Satellite Account are consistent with the Travel and Tourism Satellite Account, which includes only expenses for travel at least 50 miles away from home.

## Appendix C: MORE Commission Interim Report

### Maryland Outdoor Recreation Economic Commission Interim Report, December 2018

#### MORE Commission Executive Order

The Maryland Outdoor Recreation Economic (MORE) Commission was established in 2017 by Governor Larry Hogan through Executive Order 01.01.2017.24. The MORE Commission is co-chaired by the Maryland Department of Natural Resources and the Maryland Department of Commerce, and charged with strengthening Maryland's outdoor recreation and heritage tourism economy. The MORE Commission is tasked with developing recommendations and an action plan to enhance:

1. *The business climate for the outdoor recreation industry so as to retain and grow Maryland jobs and Maryland's economy*
2. *Maryland's brand as a premier destination for outdoor recreation and heritage tourism*
3. *Development of world-class outdoor and heritage tourism experiences*
4. *Stewardship of Maryland's natural, cultural, historical, and recreational resources*
5. *Opportunities for workforce development and job creation in the outdoor recreation industry*

#### MORE Commissioners

The MORE Commission is composed of 17 members appointed by the Governor. Appointees include Mark Belton (Co-Chair), Elizabeth Fitzsimmons (Co-Chair), Cathleen Bramble, S. Hamilton Chaney, Richard Decker, Joel Dunn, Paul Edwards, Walter Ficklin, Steven Green, Thurmond Jenkins, Matthew Liddle, Sean Mann, Deanne McCue, Tamika Newkirk, William Pickrum, Brian Raines, and David Sutherland.

#### National Outdoor Recreation Data

This year the Bureau of Economic Analysis released a new Outdoor Recreation Satellite Account providing statistics on how outdoor pursuits like biking and boating ripple through the U.S. economy. This data shows the outdoor recreation economy accounted for 2.2% (\$412 billion) of current-dollar GDP in 2016, and grew 1.7%, outpacing growth for the overall U.S. economy.<sup>6</sup> Nationwide, there is a recognition that the outdoor recreation economy is critical to local economic development, particularly in rural areas. The National Recreation and Park Association 2018 report "Promoting Parks and Recreation Role in Economic Development" asserts that even beyond direct economic impact, the increased quality of life afforded by access to recreational opportunities serves to attract and retain new businesses and talented workers to these communities.<sup>7</sup>

The National Park Service recently published a report titled "Elevating Outdoor Recreation Together" detailing the state-led movement to promote and support the growing outdoor recreation economy through the development of State Offices of Outdoor Recreation.<sup>8</sup> At least eight states have already established Offices of Outdoor Recreation (Colorado, Oregon, Montana, North Carolina, Utah, Vermont, Washington, and Wyoming), and worked together to develop and sign a set of Confluence Accords.<sup>9</sup> The Confluence Accords outline common goals and strategies in the areas of Economic Development, Education and Workforce Training, Conservation and

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<sup>6</sup> "Outdoor Recreation." *U.S. Bureau of Economic Analysis (BEA)*. [bea.gov/data/special-topics/outdoor-recreation](http://bea.gov/data/special-topics/outdoor-recreation).

<sup>7</sup> The National Recreation and Park Association and the George Mason University Center for Regional Analysis (May 2018): Promoting Parks and Recreation Role in Economic Development.

<sup>8</sup> Sausser, B. & Smith, J. W. (2018). *Elevating Outdoor Recreation Together: Opportunities for synergy between state offices of outdoor recreation and federal land-management agencies, the outdoor recreation industry, non-governmental organizations and local outdoor recreation providers*. Logan, UT: Institute of Outdoor Recreation and Tourism.

<sup>9</sup> "Confluence Accords." *Colorado Office of Economic Development & International Trade*, July 2018, [choosecolorado.com/programs-initiatives/outdoor-recreation-industry-office/](http://choosecolorado.com/programs-initiatives/outdoor-recreation-industry-office/).



Stewardship, and Public Health and Wellness. Maryland was invited to participate as an observer during the development of these Accords. Maine and Michigan are slated to sign onto the Confluence Accords this January at the Outdoor Retailer Show in Denver. Additional states looking intentionally at the concept include California, Massachusetts, Minnesota, New Hampshire, New Mexico, and New York.

### **State Outdoor Recreation Data**

Data from the Outdoor Industry Association indicates that outdoor recreation in Maryland accounts for \$14 Billion in consumer spending; \$4.4 Billion in wages and salaries; 109,000 direct jobs; and \$951 Million in state and local tax revenue annually.<sup>10</sup> These annual figures are expected to grow in accordance with the nationwide trends, but there is more we can do to promote and grow our outdoor recreation economy.

Maryland is a prime location with access to major metropolitan centers with consumers that have a high propensity to engage in and grow the state's outdoor recreation economy. The state's relatively compact size and superior transportation infrastructure makes it easy to get to and through. The state's natural attributes that include the Eastern Continental Divide, Appalachian Mountains, the Chesapeake Bay, the Inner Harbor and Annapolis Harbor, plus the Atlantic Coastline are differentiators along the Eastern Seaboard and the world. The state's earliest inhabitants and the latter settlers found a natural bounty from the land and the water. The state's early days have created a legacy that allows for the interpretation of major historical moments in our nation's history. There are many opportunities to interpret our history and heritage including the Piscataway Indians and Captain John Smith, Revolutionary War, the War of 1812 and the penning of the National Anthem, Civil War, Harriet Tubman and the Underground Railroad, and much more.

The MORE Commission benefits from numerous state and local efforts to quantify data on outdoor recreation participation, visitation, and economic impacts. Recent studies reviewed include the 2019 Land Preservation and Recreation Plan; US Fish and Wildlife 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation; and the Department of Business and Economic Development funded 2010 Maryland State Parks Economic Impact and Visitor Study and 2014 Nonresident Hunting and Fishing Surveys. The Commission is also engaging with State Universities including Morgan State's Patuxent Environmental Aquatic Research Laboratory and Frostburg University, who have quantified participation and economic impact data on non-tidal fishing and recreational uses of State Forests in Western Maryland.

### **Commission Meetings and Stakeholder Listening Sessions**

The MORE Commission first convened in March 2018 with an organizational meeting, which helped direct the approach the Commission would take in fulfilling its charge. It was determined the MORE Commission would hold regional meetings and listening sessions in a different area of the state every two months. These meetings provide insight into the unique attributes afforded by each diverse region of our state. They also provide a forum for engagement with local stakeholders to gain their perspective on opportunities and barriers to growing the outdoor recreation and heritage tourism economy in their respective communities.

Four meetings have been held to date, with one meeting rescheduled due to hazardous weather:

**March 28, 2018** - Organizational Meeting, Maryland Department of Natural Resources

**May 14, 2018** - Western Region, Woodmont Natural Resource Management Area

**July 25, 2018** - Central Region, North Point State Park

**Sept. 13, 2018** - Eastern Shore, Harriet Tubman State Park

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<sup>10</sup> "Maryland's Outdoor Recreation Economy." *Outdoor Industry Association*, 2017, [outdoorindustry.org/state/maryland/](http://outdoorindustry.org/state/maryland/).

Nov. 14-15, 2018 (to be rescheduled for 2019)- Far Western Region, New Germany State Park/WISP Resort

Nov. 26, 2018 - Conference Call, Interim Report review

Each of these meetings have involved tours, presentations, and panels of local experts spanning the fields of tourism, parks management, small business, health, recreation, history, and conservation. Meeting agendas and minutes are available on the MORE Commission website ([dnr.maryland.gov/Pages/more/home.aspx](http://dnr.maryland.gov/Pages/more/home.aspx)). Many additional stakeholders were contacted and provided input, but were not able to attend the meetings. A full list of organizations engaged to-date is attached in Appendix A.

## Themes

The regional listening sessions have afforded the MORE Commission the benefit of local knowledge and expertise regarding needs and opportunities to grow the outdoor recreation economy from communities in Western Maryland to the Eastern Shore. Despite the differences inherent in each community, many common themes have emerged. These themes will be further explored by Commission subcommittees in the coming year:

**Public-Private Partnerships** - Public-private partnerships are key to both supplementing government capacity and encouraging innovation. There is a need to support and streamline the process for private vendors and organizations to provide services and expand upon recreational opportunities on public recreational lands.

**Small Business Assistance** - Small businesses focused on outdoor recreation face barriers to entry. There is a need to better assist these businesses through all stages of development including start-up instructions, navigating permits and government processes, and marketing.

**Workforce Training/Apprenticeships** - Many outdoor recreation industries such as boating, maritime trades, and outfitters are facing a shortage of skilled workers. There is a need for increased apprenticeship programs and connections with community colleges and vocational schools to provide skills and training needed to support a growing outdoor recreational economy.

**Financing Programs** - Small Businesses need access to capital and financing programs. Outdoor recreation isn't covered under current financing models from the Department of Commerce. Program Open Space is vital to preserving and creating new recreation lands, but new sustainable funding streams may be needed for development and maintenance of recreational infrastructure and marketing of outdoor recreation and heritage tourism opportunities.

**Connectivity/Trails** - Establishing trails and connections between recreational areas and communities increases economic development and enhances the quality of life for Maryland's citizens. These connections should be promoted and supported throughout the state, especially when considering new infrastructure development such as bridges and roads.

**Engagement** - Youth are the next generation of recreational users and environmental stewards, but are increasingly disconnected from the outdoors and our state's heritage. There is a need to develop new strategies to engage, recruit and retain young people to ensure a lifetime of outdoor recreation and environmental literacy. Additional efforts should be made to engage diverse audiences in outdoor recreation.

**Water Access** - The Chesapeake Bay and our state waterways are a key provider of recreation, commercial use, and a combined heritage. There is a need to provide increased and equitable water access, maintain maritime infrastructure and open channels, and ensure the health of our waterways.

**Four Seasons Visitation** - Promoting outdoor recreation and heritage tourism on a year round basis is key to ensuring our communities benefit economically. There is a need to identify and promote off-peak recreational opportunities and synergies with heritage tourism, and market these opportunities to a wider audience.

## Interim Recommendations

The MORE Commission respectfully submits recommendations that the State should:

### 1. Evaluate establishing a State Office of Outdoor Recreation

A designated Office of Outdoor Recreation would provide a central point of contact, advocacy and resources at the state level for the diverse constituents, businesses and communities that rely on the continued health of the outdoor recreation industry. It would work with the outdoor recreation industry and small businesses to maximize their investment in Maryland, grow jobs, and improve the outdoor recreation economy. It would also create a communication forum and information clearinghouse on outdoor recreation economics, social and health benefits, and resource stewardship to help public and private organizations strengthen outdoor recreation opportunities and benefits.

### 2. Become a State signatory to the Confluence Accords.

Maryland has acted as an observer during the development of the Confluence Accords, a bi-partisan effort spearheaded by State Offices of Outdoor Recreation. The common tenants of the Confluence Accords are in line with the MORE Commission charge and have been approved by the Commissioners. Eight states are currently signatories, with five states in line to sign this coming year. Requirements for states to become signatories to the Confluence Accords include a dedicated full time staff person, dedicated budget, and reporting structure to the Governor. As a signatory, Maryland would gain a voice in this growing movement and benefit from support and established best practices from other states.

### 3. Support establishing a Chesapeake Bay National Recreation Area.

For a quarter century, the National Park Service (NPS) has played a vital role in enhancing public access and outdoor recreation in Maryland's Chesapeake Bay for the American people. This has been driven by the overwhelming natural and cultural significance of the Bay and the NPS Chesapeake Bay Gateways and Watertrails Program. Nevertheless, despite these factors and an NPS Special Resources Study finding of national significance, the Chesapeake still does not have a National Park System designation, which would offer significant economic benefits to Maryland.

Our Commission recommends establishing a Chesapeake Bay National Recreation Area. Such a designation would elevate the Chesapeake among America's great landscapes and generate substantial new outdoor recreation related businesses, visitation, tourism and jobs. In addition, it would foster a stewardship legacy, enhance public access, and support local communities. This has been done extremely successfully in other parts of the country, such as the Golden Gate National Recreation Area in San Francisco. NRA's are designated by the U.S. Congress, often are centered on large bodies of water, emphasize water-based recreation and can be designed to celebrate and support working lands and waters.

## Future Efforts

In the coming year, the MORE Commission will primarily be working in subcommittees and developing detailed recommendations for inclusion in the final report. These subcommittees will be supplemented by outside subject matter experts. The subcommittees include:

1. Enhanced business climate - Steve Green, Paul Edwards, Cathy Bramble
2. Job creation and workforce development - Tamika Newkirk, Bill Pickrum
3. Maryland branding as a premier destination - Brian Raines, Sean Mann
4. Creating world-class experiences - Joel Dunn, David Sutherland, Hamilton Chaney
5. Resource stewardship- Rick Decker, Deanne McCue, Thurmond Jenkins



The MORE Commission will also hold three additional regional listening sessions in 2019:

**January 2019** - Southern Region

**March 2019** - North Central Region

**May 2019** - Far Western Region (Rescheduled from November 2018)

The Commission intends to draft a final report by the fall of 2019, and will solicit comment and input before final submission to the Governor on December 1, 2019.

## Appendix D: Workgroup Members

### **MOREC Workgroup – Stewardship**

**Commission members:** Rick Decker (chair); Deanne McCue; Thurmond Jenkins

**Staff Facilitator:** Ingrid Brofman, Maryland Department of Natural Resources

**Workgroup Members/Outside Experts:**

Alex Perez, Anglers Sportscenter

Becky Curtis, C&O Canal Trust

Molly Gallant, City of Baltimore, Outdoor Recreation

Lisa Gutierrez, Maryland Department of Natural Resources

Emily Huebner, Heart of the Civil War Heritage Area

David Myerberg, Deep Creek Watershed Foundation

Margaret Enloe, Waterfowl Chesapeake

Charles Mazurak, MARYLAND Department of Natural Resources

Don VanHassent, MARYLAND Department of Natural Resources

Peter Morrill, MARYLAND Department of Natural Resources

Jared Parks, Lower Shore Land Conservancy

Jennifer Ruffner, MARYLAND Heritage Areas Program

Dean Hughes, MARYLAND Park Service

Robert Bailey, MARYLAND Park Service

Anne O’Neil, National Park Service

Chris Stubbs, National Park Service

Cheryl Ladota, Recreational Trails Program, MARYLANDOT SHA

Nate Evans, Baltimore County Pedestrian and Bicycle Advisory Committee, Gunpowder United Mountain Bike Operators (GUMBO)

Paul Peditto, MARYLAND Department of Natural Resources

Erik Zlokovitz, MD Department of Natural Resources

### **MOREC Workgroup – Business Climate, Workforce Development and Job Creation**

**Commission members:** The Honorable Paul Edwards, Cathy Bramble, Steve Green

**Staff Facilitators:** Trystan Sill, MD Department of Natural Resources and Marci Ross, Maryland Department of Commerce, Office of Tourism Development

**Workgroup Members/Outside Experts:**

Cassandra Van Hooser

Bill Atkinson

Melanie Purcel

Ashli Workman

Rick Decker

Tamika Newkirk

Dr. Ernest Boger

Michael Logsdon  
Susan Zellers  
Ginger Mihalik

### **MOREC Workgroup – Branding**

**Commission members:** Sean Mann, Steve Green

**Staff Facilitators:** Liz Fitzsimmons and Brian Lawrence, Office of Tourism Development

**Workgroup Members/Outside Experts:**

Hal Ashman, Ultimate Watersports;  
Sandy Turner, Cecil County Tourism;  
Jim Rap, Delmarva Birding;  
Greg Pizzuto, Harford County Tourism

### **MOREC Workgroup - Enhance Development of World-Class Outdoor and Heritage Tourism Experiences in Maryland**

**Commission members:** Joel Dunn, Hamilton Chaney, David Sutherland, Scott Knoche

**Staff Facilitators:** Heather Ersts, Office of Tourism Development

**Workgroup Members/Outside Experts:**

Aaron Marcavitch, Maryland Milestones Heritage Area  
Anne Kyle, OTD  
Callie Hoyt, National Marine Manufacturers Association  
Cheryl Ladota, MDOT Recreational Trails Program  
Chuck Montrie, Maryland Recreation & Parks Association  
Clyde Hicks, The Trail House  
Daryl Anthony, MD OHV Alliance  
Doug Bigelow, Bigelow Motorsports  
Emily Huebner, Heart of the Civil War Heritage Area  
Heidi Schlag, C&O Canal Trust, Inc.  
Jen Ruffner, MHAA  
John Stefanick, Chesapeake Bay Magazine  
Jonathan Doherty, Deputy Superintendent, NPS Chesapeake Office  
Kelly Collins Choi, MORE Staff  
Margriet Mitchell, Marketing Director Jeanneau America  
Mollie Winans, PropTalk, Spinsheet, Fish Talk Magazines/Boat Shows  
Nancy Doran, DNR, Wildlife and Heritage - Information/Education  
Nita Settina, DNR Parks  
Pete Lesher, CBMM  
Regina Welsh, US Pony Racing  
Tom Weaver, Charter Captain/Eastport Yacht Company