
Building Vibrant Communities Through Recreation



2025 Rural Summit

***“Elevating Maryland through Stronger
Rural Communities”***

November 19 & 20

Annapolis, MD

Session Presenters



Sandi Olek, Director
Office of Outdoor Recreation
Maryland Department of Natural Resources



Jeffrey Simcoe, Executive Director
Frostburg Outdoor Recreation Economy Institute (FOREI)
Frostburg State University



Owen Bailey, Director
Land Use & Policy
Eastern Shore Land Conservancy

Jennifer Sulin-Stair, Owner
Plot Twist Horse Farm, LLC



Recreation and Vibrant Communities

Office of Outdoor Recreation | Maryland DNR | November 20, 2025



U.S. ECONOMIC BENEFITS OF OUTDOOR RECREATION

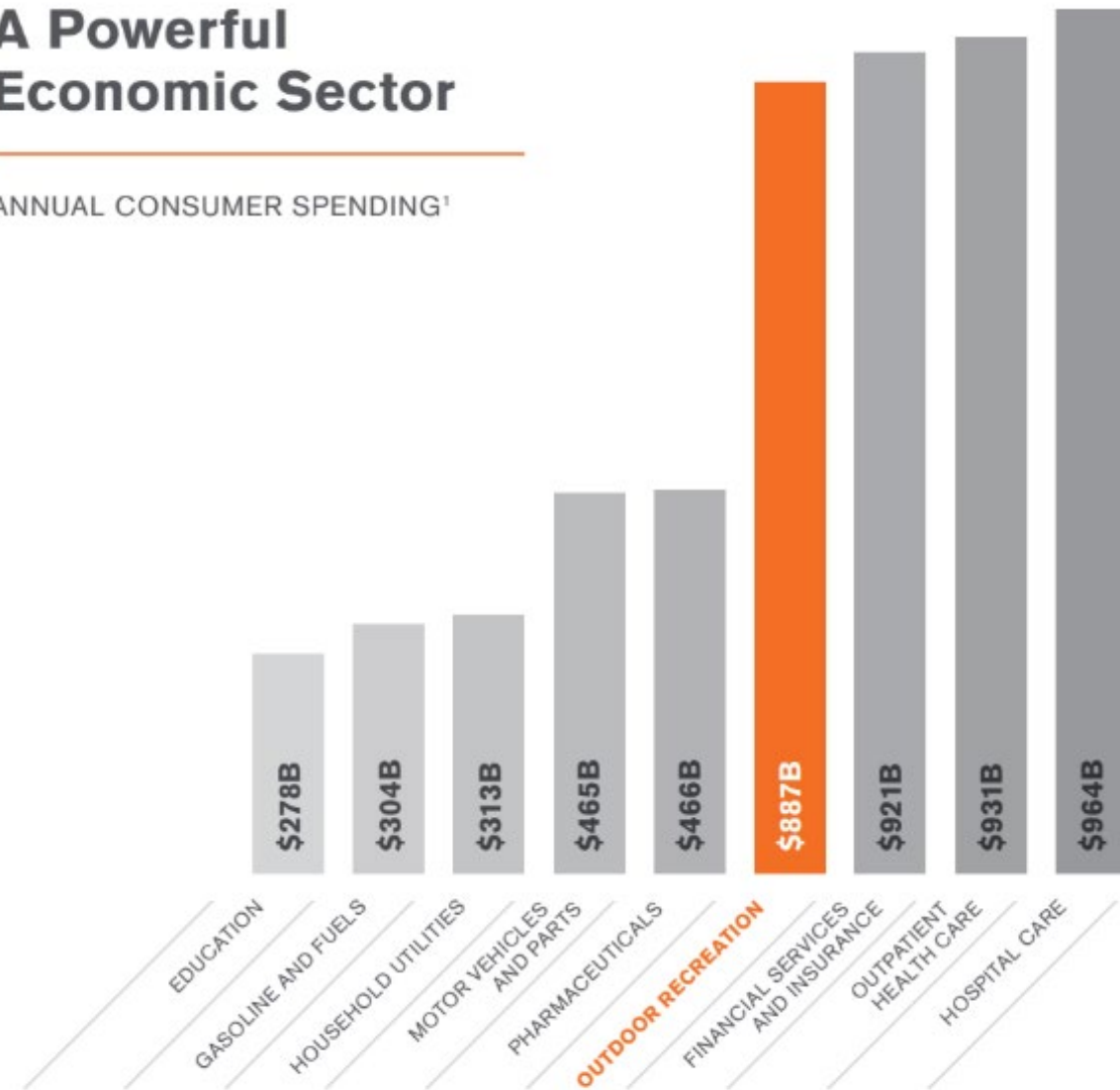
The Outdoor Rec Economy Nationally Generates...

- ❖ \$1.2 Trillion Economic Impact - 2023
- ❖ 2.3% of National GDP - Up 5% from 2022
- ❖ 36% growth in Real Gross Output since 2012
- ❖ 5 million jobs, 3.1% of Employment



A Powerful Economic Sector

ANNUAL CONSUMER SPENDING¹



¹ Bureau of Economic Analysis, Personal Consumption Expenditures by Type of Product

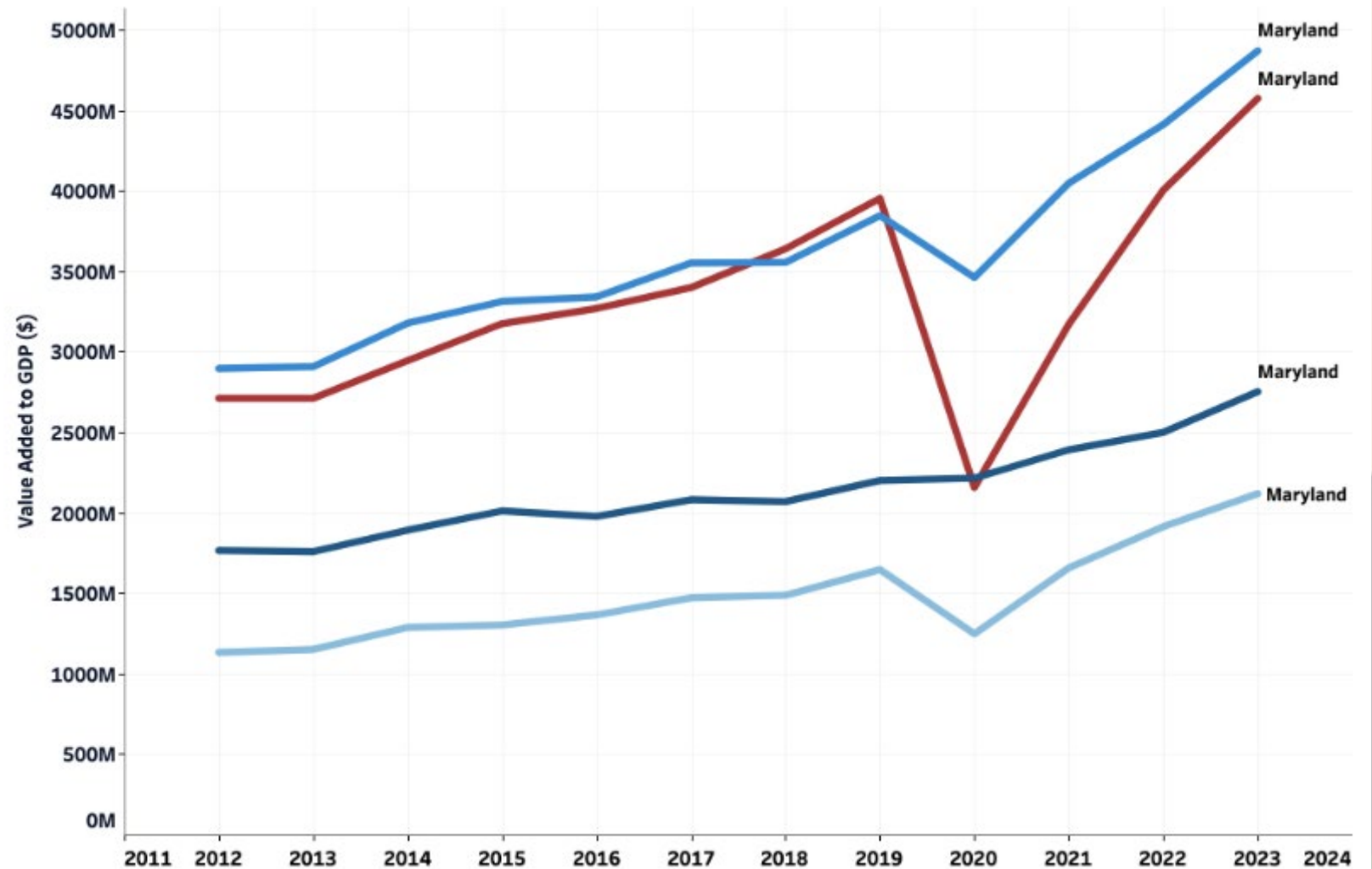
MARYLAND ECONOMIC BENEFITS OF OUTDOOR RECREATION

Value Added to GDP (\$) by
Outdoor Recreation Activity

■ Total Core Outdoor Recreation
■ Conventional Outdoor Recreation
■ Other Outdoor Recreation
■ Supporting Outdoor Recreation

KEY TAKEAWAYS:

- ❖ +81,000 jobs & \$5.4 billion in wages and salaries.
- ❖ Added 9.4 billion dollars (1.8% of GDP) & grew 12% in one year.



MARYLAND'S OUTDOOR INDUSTRY

\$9.4 billion
81,000 jobs



Producers of outdoor gear and infrastructure

- design
- manufacturing
- construction
- distribution
- retail
- maintenance and repair



Providers of outdoor experiences

- guides and trip planners
- charters, outfitters and rental shops
- restaurants and lodging
- adventure centers
- event organizers



Professionals supporting outdoor recreation

- planners and designers
- map and guidebook makers
- data providers and researchers
- rangers, foresters, educators and trainers
- photographers, videographers, journalists, artists
- accountants, attorneys, consultants
- public-sector employees and leaders

BENEFITS OF OUTDOOR RECREATION



Economic Benefits

- ❖ +81,000 jobs & \$5.4 billion in wages and salaries.
- ❖ Added 9.4 billion dollars (1.8% of GDP) & grew 12% in one year.



Health Benefits

- ❖ Improved focus, lower stress, better mood, and reduced risk of developing a mental health condition.
- ❖ Natural outdoor environments are more enticing for physical activity and are more likely to motivate people to exercise, leading to higher levels of fitness.



Community Benefits

- ❖ Outdoor recreation brings people of different demographics together!
- ❖ Engaging with nature encourages stewardship & green practices!

PRIORITIES OF THE OFFICE OF OUTDOOR RECREATION

Include

- ❖ Outdoor Equity Grants
- ❖ Adaptive Trail Planning
- ❖ Language Training
- ❖ Partner Programming
 - Blind Skiing and Camping
 - Family Campouts



Expand

- ❖ Trail Expansions and Connections
- ❖ eBike Policy
- ❖ Fly Fishing Program
- ❖ Forest Bathing and Nature-Based Therapy Training
- ❖ Track Your Trails-Community Science
- ❖ Workforce Development

Amplify

- ❖ Outdoor Recreation Summit
- ❖ Social Media Campaigns
- ❖ Newsletter
- ❖ Business Directory
- ❖ Outreach Events
- ❖ Partner Connections



ENGAGEMENT ACROSS THE STATE



- Participating in the Maryland Statewide Trails Plan
 - Plan led by MDOT
 - Public Input, Inventory of Trails, Toolkit
 - Building Support, Funding, O & M
 - DNR-connecting transportation trails to state lands



EXPANDING ADAPTIVE TRAILS

- Trails on State Parks and Forests
 - Patapsco Valley State Park, Mckeldin Area
 - Rocky Gap State Park
 - Tuckahoe State Park
 - Margraff Plantation in Savage River State Forest
 - Green Ridge State Forest
- Sharing Information Through
 - Stakeholder meetings
 - Press Releases
 - Social Media Posts



Tuckahoe State Park to Host Celebration of National Trails Day June 1

May 28, 2024

Park to debut new 'sensory trail' designed to enhance access

The Maryland Department of Natural Resources Office of Outdoor Recreation and Tuckahoe State Park invite the public to celebrate National Trails Day on Saturday, June 1 with a full day of family-friendly programs at the park. Visitors will be invited to take part in activities such as guided walks, prize raffles, a fishing derby, informational displays, archery programs and much more.

The day's event will kick off at 10 a.m. with a ribbon-cutting for Tuckahoe's new Lore of the Land, Sensory Trail. This type of trail, planned specifically for people with disabilities and sensory impairments in particular, encourage visitors to use more of their senses, which will benefit all ages and abilities. The easy-to-navigate loop trail provides a series of stations designed to collectively immerse people in a multi-sensory journey. Hikers learn to recognize different sounds, textures and smells along the trail, thereby gaining confidence in their own abilities to interpret the



PROMOTE MARYLAND'S TRAILS & ENGAGING VISITORS

- Track Your Trails
- The Ice Cream Trail
 - Partnership with the MD Department of Agriculture
 - Planning other trails, including Bike & Brew and Shuck & Stout...
- eBike Regulation
 - Opening some trails on state lands to eBikes to increase accessibility to outdoor recreation in Maryland!



SUPPORTING COMMUNITIES

Trails connect people and spaces.

- ❖ Recreationists explore their own communities and often explore different parts of the state, **fueling the local economy.**
 - Patapsco Valley State Park, Avalon Area is “a Mecca for mountain biking enthusiasts”, who often travel from around the nation to ride these trails.
- ❖ Individuals will **connect with one another**, form new friendships, and **form community** with those joining them on the trail.
- ❖ 60%-80% of natural trail users in rural areas will engage in the local economy



What Can Communities Do?

- Identify outdoor rec assets- current and future needs
- Identify and empower local champions
- Seek collaboration and buy in from the community
- Incorporate Outdoor Recreation into the “Brand”
- Destination management- What’s in it for us?
- Attract and support outdoor rec businesses!





FROSTBURG OUTDOOR RECREATION ECONOMY INSTITUTE

FROSTBURG

STATE UNIVERSITY

FSU Division of Advancement & Regional Engagement



- FOREI
- Office of Sponsored Programs
- Small Business Development Center
- Summit Station: Innovation & Entrepreneurship Hub
- Tri-State Growth & Commerce Coalition (TGCC)
- Cultural Event Series

FOREI's Program Areas



- Workforce Development
- Experiential Programming
- Small Business & Entrepreneur Support
- Stakeholder Engagement
- Advocacy for Recreation Infrastructure
- Data Collection & Analysis

Recreation & Rural Economies



- Public Lands Form the Backbone of the Outdoor Economy
- Small Businesses & Support Organizations Drive Growth
- Developed Outdoor Economy Ecosystems Maximize Economic Impact & ROI
- Rural Regions are Especially Poised to Benefit

Economic Impact: The Great Allegheny Passage



- \$121 Million in Economic Impact, 1 Million Users in 2024
- Mostly Direct Spending in Trail Facing **Small** Businesses
- Overnight Travelers Spend Almost \$500/day
- Allegany County captures 25% of the GAP's Economic Impact
- Surveys show that many businesses exist solely to serve GAP Users



Our Vision

All people throughout the Eastern Shore are connected through a safe and sustainable trail network, from the shores of the Chesapeake to the beaches of the Atlantic, through the towns, fields, and forests between.

Our Mission

To galvanize communities and support them in planning, promoting, advocating for, and implementing a diverse system of accessible trails and safe crossings across the region.





MESTN Strategic Plan

Convene – We have brought together towns and counties at regional events, trail events, at local parks and trails

Plan – We have developed the MESTN trail map with assistance from ESRGC and MDOT and drafted a Strategic Plan with identified Working Groups.

Advocate – We have presented to Bike MD, MBPAC, Forever MD land conference, outdoor recreation summit, BPMP, MD Trail subcommittee.

Communicate – We have developed logo, website, social media, a one page fact sheet, and a communications plan.
at MESTN.ORG



What Have We Done So Far?

Since 2022, ESLC and its partners have met with counties and most municipalities to understand interests and needs, hosted Celebrate Trails Day events & proclamations and received support from DHCD, Mid-Shore Regional and Rural MD Council.

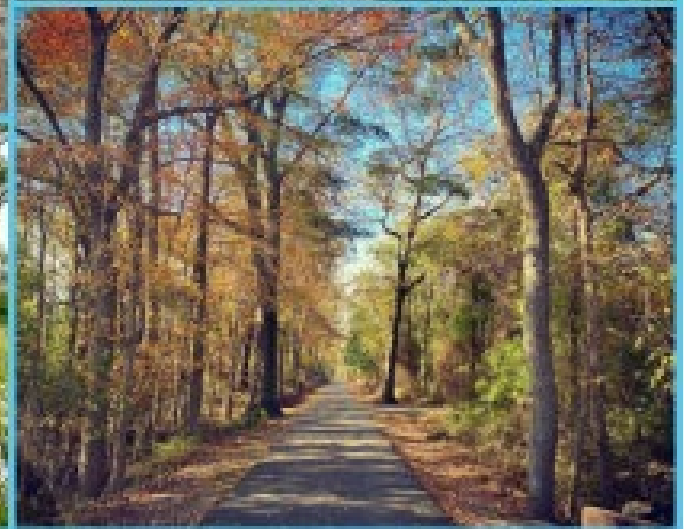
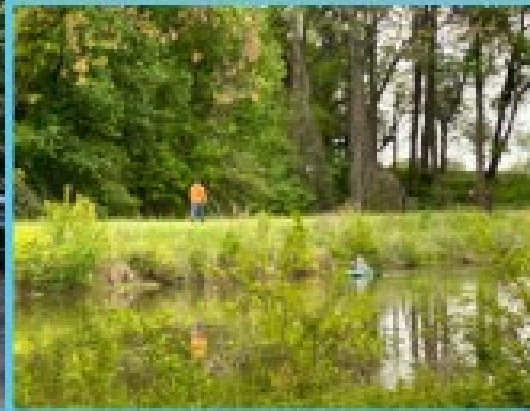


**CELEBRATE TRAILS DAY
CHESTERTOWN, MD**

CELEBRATE TRAILS DAY PROCLAMATIONS		
TOWNS		COUNTIES
<ul style="list-style-type: none">• Cambridge• Chestertown• Centreville• Denton• Galena• Millington• Salisbury• Snow Hill		<ul style="list-style-type: none">• Dorchester• Kent• Queen Anne's• Somerset• Wicomico• Worcester



Join Us on the Trail . . . Thank You!





ECONOMIC IMPACT OF RECREATIONAL HORSEBACK RIDING IN MARYLAND

JENNIFER P. SULIN, MS

OWNER/CEO, PLOT TWIST HORSE FARM, LLC

FOUNDER, SULIN'S EQUINE AND COMMUNITY PARTNERSHIPS NON-PROFIT

GOVERNOR APPOINTED MEMBER, MARYLAND HORSE INDUSTRY BOARD



AMERICAN HORSE COUNCIL FOUNDATION SURVEY

- The American Horse Council Foundation is a 501(c)(3) non-profit foundation which supports charitable, scientific, and educational projects and research that benefit the U.S. horse industry.
- Mission “To Protect and Strengthen the U.S. Equine Industry”

GROSS ECONOMIC IMPACT OF HORSES IN MARYLAND

- 94 Thousand Horses in the State of Maryland
- Direct Impact on GDP – 1.05 Billion Dollars
- Direct Employment Impact = 21,841 jobs
- Total Value Added to the Maryland economy: \$1.77 billion.
- Employment impact: 28,434 jobs
- Total Economic impact in Maryland: \$2.9 billion



HORSES IN MARYLAND

Percentage of MD households that:

- Own Horses - 1.23% (28,957)
- Participate in horse activities (but do not own a horse)- 19.40% (456,769)
- Non-Horse Owners/Riders Spectate at horse events (but do not own or participate in horse activities) – 9.85% (231,885)
- In total, 30.48% (717,611) of households in MD contain horse enthusiasts.

HORSES IN MARYLAND (CONT)

Of the Maryland horse-owning respondents in the AHC association survey, approximately 62% reported owning or leasing a farm, barn, or stable.

In Maryland, the land owned or leased for horse-related uses is estimated at 220,000 acres, or approximately 2.3 horses per acre



MARYLAND EQUESTRIAN ASSOCIATIONS

- Dedicated to preserving trails and public lands
- Often provide environmental conservation work through their membership



COMMON EQUINE ACTIVITIES

In terms of number of horses and participants, recreation is the largest sector of the Maryland horse industry (43,049 participants or 46%)

Trail riding is a main equine recreational activity that allows people to experience public lands and parks on horseback.

COMMON EQUINE ACTIVITIES (CONT)

Trail riding: 9.8% (230,763) households in Maryland.

- The vast majority of trail riders—87%—utilize public lands.

Riding Lessons: 6.0%, or 141,283 households in Maryland.



ECONOMIC IMPACT OF RECREATIONAL RIDING

The recreation sector supports more than 3,500 direct jobs and adds \$160 million in direct value to the Maryland economy.

These direct impacts drive a further \$114 million in added value to the economy and more than 1,000 jobs from indirect and induced effects.

ECONOMIC IMPACT OF RECREATIONAL RIDING (CONT)

The Recreational Rider typically spends
\$19,110 per year per horse



OTHER ECONOMIC IMPACTS

Tourism Travel Equine Related -\$271 Million

Tourism Dining Equine Related – \$208.3 Million

Tourism Lodging - \$243.6 Million



Thank You!



Sandi Olek, Director

sandra.olek@maryland.gov



Jeffrey Simcoe, Executive Director

jsimcoe@frostburg.edu



Owen Bailey, Director

OBailey@eslc.org

Jennifer Sulin-Stair, Owner

plottwisthorsefarm@gmail.com