

**MORE Commission Meeting Notes  
September 13th, 2018, 11am-3:30pm  
Harriet Tubman State Park**

**Commissioners Present:** Mark Belton, Hamilton Chaney, Rick Decker, Joel Dunn, Paul Edwards, Liz Fitzsimmons, Steve Green, T.J. Jenkins, Matt Liddle, Sean Mann, Deanne McCue, Tamika Newkirk, William Pickrum,

**Commissioners Absent:** Cathy Bramble, Walter Ficklin, Brian Raines, David Sutherland

**Staff:** Ingrid Brofman, Kelly Collins Choi, Scott Knoche, Dana Paterra, Joanne Throwe

**Welcome and Park History** – Dana Paterra, Manager, Harriet Tubman Underground Railroad SP

**Local Opportunities Panel**

Amanda Fenstermaker, Executive Director, Dorchester County Tourism – Opportunities with Tourism and Heritage Areas. 13 HAs in MD, goal of HA to transform ideas into activities, with \$5M in grants for Heritage Tourism. Product development vs. marketing, works the same way and helps that they are same office. “Water Moves Us” started in Economic Development Office to address “What is special about Dorchester County?” Uses personal stories as marketing. Recreational assets include Ironman Race, over 1500 participants, brings \$Millions into local economy. Opportunities: Develop more experiences linking nature and history. Creation of Harriet Tubman SP grew visitation to Blackwater NWR by 10,000 visitors/year. Need more opportunities for entry-level hunting and ways to connect tourists with landowners and hunting guides. Difficult if you don’t already have family or local hunting contacts. Rail to Trail access opportunities. Need additional campgrounds in Dorchester County.

Katie Parks, VP Conservation, Eastern Shore Land Conservancy – ESLC Coastal Resiliency Program is uniting Delmarva forces for conservation and public access. Goal is to conserve 50% of Delmarva, but consider recreation when protecting land. Center for Towns focused on revitalization and creating mixed-use spaces to become economic drivers. Ie. Cambridge Cannery Park blends economic development, recreation, restoration. Opportunities: Create more key spaces as economic drivers in small towns through community engagement and partnerships. Need additional economic studies in Delmarva, referenced Smithwick & Assoc study of land value – Agric \$2.8B, Outdoor Recreation \$3.9B, Ecological benefits \$15B, Fish \$300M.

Bernadette Bowman, Executive Director, Kent County Tourism – Kent County gains \$61M in visitor expenditures, \$8.9M Recreation Sales. Boating is large driver, 20 marinas with 2,700 boat slips and 31 public landing sites. Captain John Smith Water Trail and Chestertown Marina projects are ongoing. Opportunities: Utilize Fish & Hunt MD and other State Tourism products;

small counties with small budgets benefit from those investments, need more money put into marketing at the state level. Federal Lands, ie. Eastern Neck NWR are key to local economies, need to advocate for continued funding and staff so they are not closed.

Jim Rapp, Organizer, Delmarva Birding Weekends – Birding trips are growing in popularity, selling out their guided trips. Opportunities for year-round use of charter boats for birding trips, especially key for shoulder seasons of spring/winter. Wildlife watching is up 20%, one of highest growth outdoor activities. Eastern Shore and Baltimore are key markets, Ft. McHenry #17 National Park in country for best birding. Estimate \$333M in-state revenue from birding. Opportunities – eBird is a crowdsourcing website that shows most popular birding sites, Tourism offices could use to promote those areas to the birding community. Non-consumptive recreation could be added to Fish & Hunt MD. Recovering America’s Wildlife Act provides funding for non-game habitat restoration, would support birding habitats, State should support the bill.

Bill Harvey, DNR Game Bird Section Leader, Sean Mann Outdoors & TJ Jenkins, Muddy Marsh Outfitters – Chesapeake is the “birthplace of America’s waterfowl hunting.” Long history of goose hunting tourists, but goose and duck hunting is declining while deer hunting up. Hunting licenses declining for residents, relatively stable for non-residents, 3 day non-resident waterfowl hunting licenses up. Sika deer unique, originally Japanese species related to elk. Dorchester County only place in the nation where you can hunt them in the wild, and interest growing. Sika presence increasing real estate value of marsh land. Opportunities: Capitalize on rich waterfowl history and reinvigorate interest in hunting on the eastern shore. 15 waterfowl museums in the state, tie history to recreation. Involve outfitters in hunter recruitment with positive first time guided experiences. MD has highest diversity and numbers of waterfowl in the east, create a winter waterfowl trail highlighting waterfowl viewing and attractions. Develop better economic surveys of waterfowl and sika deer hunting, viewing/photography, and related tourism.

Panel Discussion – To recruit and retain hunters, strategize moving new hunters from intro programs such as “Outdoors woman” or “waterfowl 101” to “first shot” programs. Need to change marketing strategies, especially to youth, ie, promote hunting and local and sustainable food movements. Commission would like to further discuss opening hunting on Sundays and the stakeholder concerns involved. Need to develop the next generation of environmental stewards and recreational users, equitable access is key. Additional information and support regarding Recovering America’s Wildlife Act directed to Alliance for America’s Fish & Wildlife.

## **Outdoor Recreation Economic Data and National Trends**

Jessica Wahl, Government Affairs Manager, Outdoor Industry Association – America’s Outdoor Recreation Economy generates \$887B consumer spending, supporting 7.6M jobs, \$65.3B federal tax revenue and \$59.2B state/local tax revenue. OIA issued the first Outdoor Recreation Economy report 10 years ago, and now have data for all U.S. congressional districts in addition

to national, regional and state results. OR in MD annually generates \$14B consumer spending, \$951M in state/local tax revenue, 109,000 direct jobs, \$4.4B wages/salaries. OIA Outdoor Participation Report (2017): 1. Running, Jogging and Trail Running, 18% of Americans 2. Freshwater, Saltwater and Fly Fishing, 16% of Americans/47.2 million participants 3. Road Biking, Mountain Biking and BMX, 15% of Americans/45.8 million participants 4. Hiking, 14% of Americans/42.1 million participants 5. Car, Backyard, Backpacking and RV Camping, 14% of Americans/40.5 million participants. OIA highlights state funding mechanisms for outdoor recreation (case studies on their website).

Mauricio Ortiz, Chief, Regional Income Division, Bureau of Economic Analysis – Outdoor Recreation Jobs and Economic Impact Act of 2106 requires federal government to annually assess outdoor recreation economy and contribution to GDP. Partner with Federal Recreation Council, 7 federal agencies stewarding public land and water. Estimate Process: Define Outdoor Recreation (Conventional vs. Other/Supporting), Link to Statistical Framework, Estimate Partial Categories, Generate Results. Draft data released, final data released Sept 20<sup>th</sup>. Outdoor Recreation 2% of GDP, \$380B; more than mining and utilities. Economic data is on their website, can be broken out by activity. State numbers should be coming, but awaiting funding.

Panel Discussion: How do the numbers differ? OIA takes an expenditure approach and includes all trips/travel, while BEA takes a production approach and is focused on GDP, so does not include imports or trips travel <50 miles. OIA doesn't include the "other" activities from BEA's data (ie. field sports, festivals, etc). Numbers can be used together and complement each other. Can we bring BEA data down to congressional district level? Not likely due to data limitations. BEA doesn't collect data, limited data available in small population areas of country. Does BEA data include boating repairs/maintenance? Yes, it is captured. What recommendation would OIA make to the Commission? Develop an Office of Outdoor Recreation with manpower devoted to supporting and growing the industry. Invest in land and increased access and opportunities for outdoor recreation.

## **Ocean Recreation Panel**

Angela Baldwin, Manager, Assateague Island SP – A recent National Park Service (NPS) report shows that 2,347,166 visitors to Assateague Island National Seashore in 2017 spent \$99,819,800 in communities near the park. That spending supported 1,284 jobs in the local area and had a cumulative benefit to the local economy of \$110,986,600. Assateague is the #1 search on tourism websites, with local, regional, and international visitors. State Park Use agreements include resource based, minimal impact, vendor agreements, and NPS agreements. Opportunities: Cottage rentals very popular and vendor run, more opportunities for private partnerships such as private event venues/ghost tours/historic attractions. Business partnership opportunities exist for providing green energy options in campgrounds (reducing use of generators, provide rentals for

solar/wind power options, demand for electric hookups continues to increase). Park facing climate change challenges including flooding, shuttles/ferry services may be needed for visitors with satellite parking and camping locations at underutilized parks such as Pocomoke River SP, Tuckahoe/Martinak SP, and Janes Island SP.

Lisa Challenger, Executive Director, Worcester County Tourism – Worcester County tourism generates \$1.7M annually, supporting 10,000 jobs. Only county in MD with ocean access. Partnerships include the Maryland Coastal Bays Program, Grays Creek project, connecting to bayside. Comprehensive water trails map “Paddle Assateague.” “Host our Coast” successful marketing tool, video and blogging promoter chosen through video competition. Recent Coastal Bays economic impact study shows \$1.2B in annual economic value, \$700M in MD. Opportunities: Trail connections through Delmarva such as Cape to Cape scenic byway. Promote activities in and around Coastal Bays, currently an “untapped gem” as well as birding weekends.

Suzy Taylor, Owner, Ayers Creek Adventures – Business focused on paddling adventures and family experiences, getting youth on the water through school programs, even have groups coming from out of state. Now have adaptive paddling for those with disabilities. Opportunities: Need to develop more year-round opportunities and promote multi-stops, such as passport to encourage check-ins at different parks and sites. Need to connect outdoor recreation with promoting healthy lifestyles and mental health, especially for youth. Coastal Bays has underutilized water access such as Pocomoke landing and Georges Creek. Need to do more workforce development by bringing people into the industry and developing their skills, offer internships and mentoring in outdoor recreation activities and industries like paddling.

Scott Lennox, Owner, Hooked on OC – Hooked on OC is a marketing and promotion business with TV shows and website focused on fishing and ocean/coastal activities. Ocean City has the best saltwater fishing, fishing tournament participation is increasing, ie. White Marlin Open. Opportunities: Better market Maryland’s ocean recreation opportunities, especially ocean fishing, to out-of-state residents through trade shows such as Harrisburg with 200,000+ attendees. Hunt/Fish MD will now have booths in hunting & fishing halls. Minimum wage regulations hurting small and seasonal businesses, leading to less employment and lower customer service capability.

Panel Discussion – Is the EO on schools starting later affecting Ocean City business? Yes, it’s been a tremendous success for businesses and families recreating. How does the Ocean City fishing community feel about offshore drilling and wind farms? They are against offshore drilling and skeptical of wind farms; understand wind turbines create habitat, but don’t feel assured about continued long-term navigable access to the sites. Marina workers affected by lack of H2B visa program, rely on program for full staffing. Also, paid sick leave for seasonal employees hurting hiring, especially pool of college kids working in fishing industry. Need to ensure opportunities for small businesses to get on state level tourism websites. Look at whether Heritage Area grants can fund state tourism projects.

## **Commission Wrap-up**

Secretary Belton – MORE Commissioners asked to sign up for subcommittee workgroups tasked with developing recommendations for their final report. MORE Commissioners asked whether there was concurrence with the “Outdoor Recreation Industry Confluence Accords” focused on common principles (economic development, education and workforce training, conservation and stewardship, public health and wellness) adopted by eight other states across the nation. All Commissioners present expressed support for the content of the Confluence Accords.