MASSACHUSETTS OUTDOOR INDUSTRY PATHWAYS

Needs & Opportunities Report

Spring 2026

Supporting Material
MASSACHUSETTS OUTDOOR BUSINESS SURVEY: FINDINGS REPORT

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Survey Overview

The Massachusetts Office of Outdoor Recreation (MOOR), in partnership with SE Group and First Seeds Sown Sales and Marketing, conducted an online survey of outdoor recreation businesses across Massachusetts in early 2026. The survey was designed to establish a baseline understanding of business conditions, workforce needs, challenges, and priorities to inform the Massachusetts Outdoor Industry Pathways initiative. While the target audience was for-profit outdoor recreation businesses, nonprofit organizations were also able to participate[1]. A total of 147 businesses responded, including 107 complete and 40 partial responses. The survey was distributed through email addresses gathered through the statewide outdoor recreation business inventory, as well as through tourism newsletters, chambers of commerce, state agency networks, and MOOR's social media channels. Unless otherwise noted, percentages in this report reflect all respondents who answered each question.

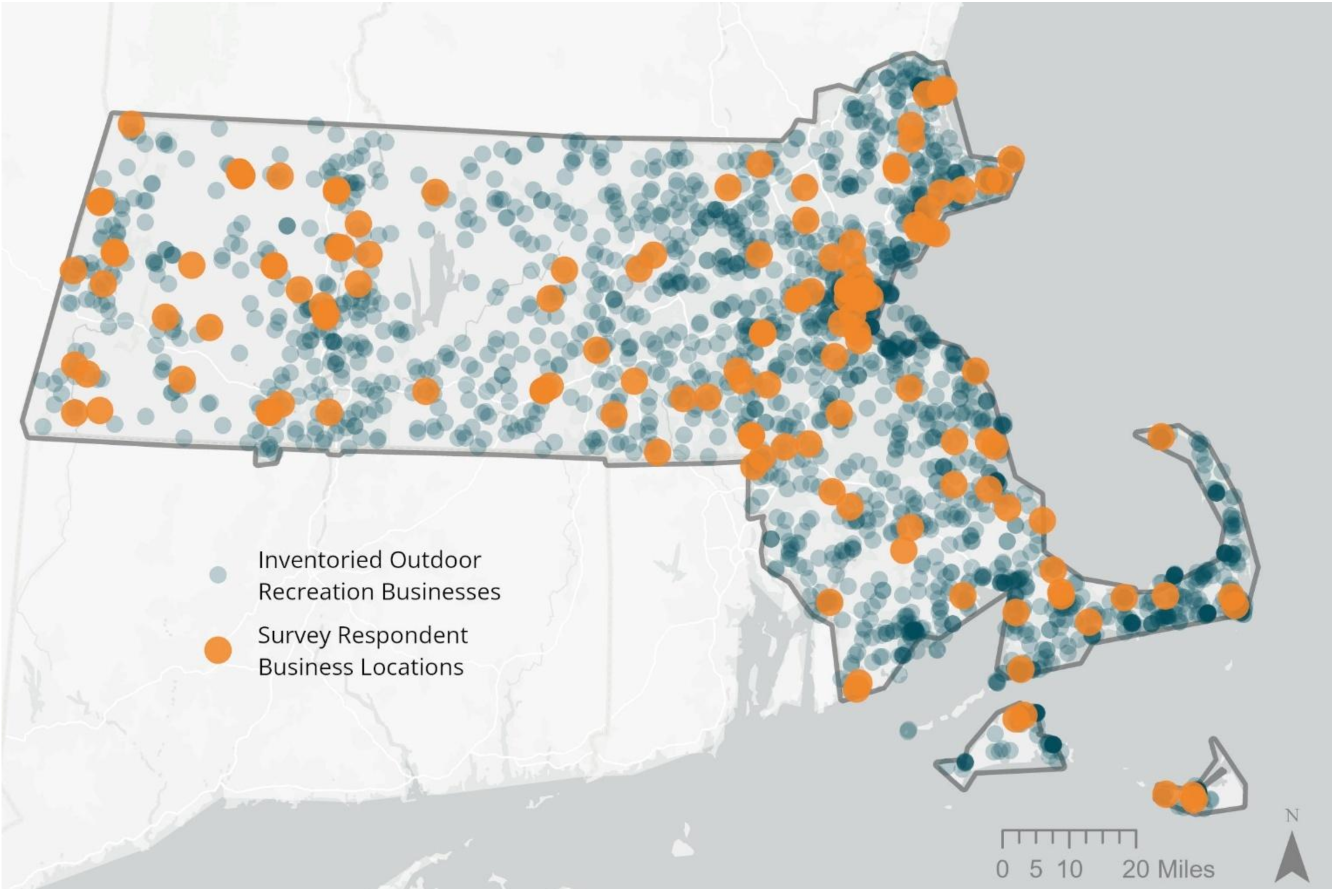
While responses were received from across the state, comparison to the full business inventory indicates some geographic variation in representation. The Berkshires/Western MA is notably overrepresented, accounting for 29% of survey responses but only 14% of inventoried businesses. Greater Boston also shows slight overrepresentation (20% vs. 16%). In contrast, Cape Cod & Islands (11% vs. 20%), Southeastern MA (12% vs. 18%), and Metro North (15% vs. 18%) are underrepresented relative to their share of businesses. Central MA aligns closely with the inventory (14%), suggesting balanced representation in that region.

Respondent Snapshot

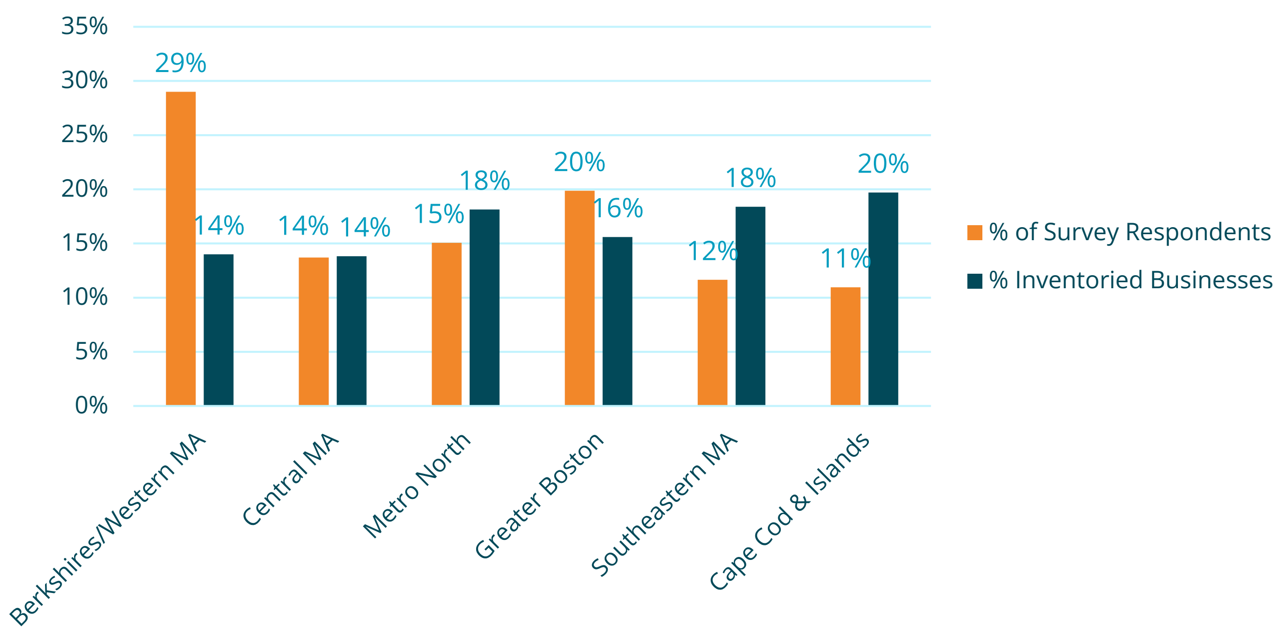
Metric	Value
Total respondents	147
Complete responses	107 (73%)
Partial responses	40 (27%)
Registered 501(c)(3) nonprofits	24 (19% of those who answered)
BIPOC-owned businesses	8 (6% of those who answered)
Mean/Median years in business	30 years/20 years
Are the original founder	52% of respondents
Business is respondent's full-time job	64% (of those who answered)

[1] Non-profit responses are excluded from select sections of this analysis; where applicable, a note on inclusion is provided at the beginning of each section.

Map of Business Locations of Respondents



Percent Respondents by Region Compared to Inventoried Businesses by Region

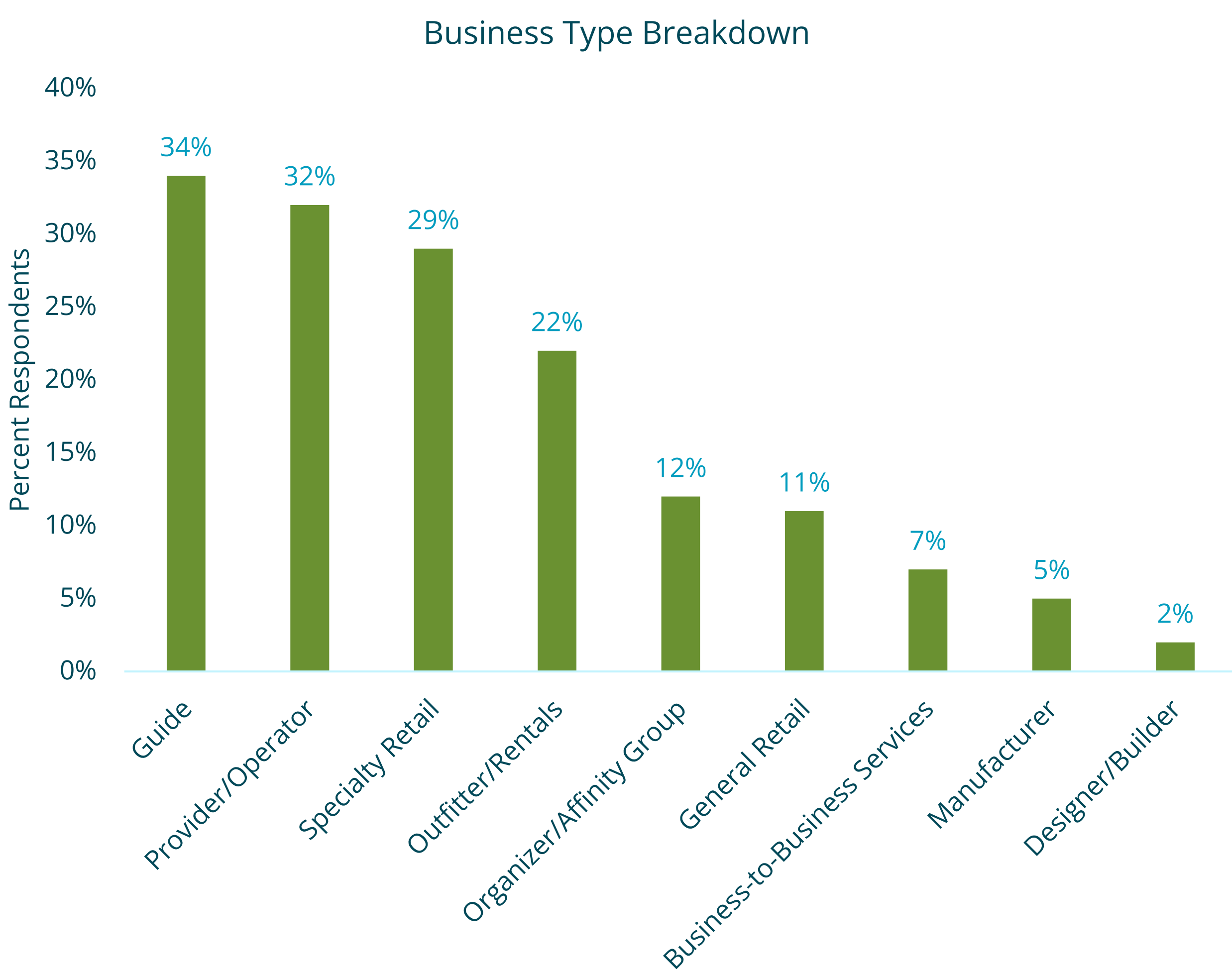


Comparison to Massachusetts Outdoor Business Inventory

A comprehensive inventory of the Massachusetts outdoor recreation economy identified more than 2,400 businesses operating within the sector. While direct percentage comparisons between the inventory and survey results are not possible, given that survey respondents could select multiple activity categories, the data allows for meaningful directional insights. Overall, the distribution of survey responses by activity type closely aligns with broader industry patterns observed in the full inventory. For example, fishing-related businesses represent approximately 25% of all identified businesses, making it the largest category in the inventory; this is consistent with survey findings, where fishing also emerged as the most represented activity type.

Business Type Mix

Respondents represent a diverse cross-section of the outdoor recreation economy. Many businesses identified with more than one category.



Note: Respondents could select multiple categories; percentages do not sum to 100%.

Activity Focus

Businesses serve a wide range of outdoor recreation activities. The top activities by number of businesses are shown below.

Activity	# Businesses	% of Respondents
Fishing / Ice Fishing	36	28%
Kayaking / Canoeing / Paddlesports	27	21%
Mountain Biking	26	20%
Backpacking / Hiking	23	18%
Road Biking / Gravel Biking	22	17%
Summer Camp	20	15%
Adaptive Sports	16	12%
Bird Watching / Wildlife / Photography	16	12%
Cross-country Skiing / Snowshoeing	15	12%
Motorized Boating	15	12%
Sailing	15	12%
Rock Climbing / Bouldering / Mountaineering	14	11%
Archery / Shooting	13	10%
Horseback Riding	13	10%
Swimming	13	10%
General Outdoor Apparel	13	10%
Camping / RV	12	9%
Alpine Skiing / Snowboarding	11	9%
Hunting	8	6%
Running	7	5%
BMX	6	5%
Disc Golf	6	5%
Surfing / Wakeboarding / Watersports	6	5%
Ice Skating	4	3%
Motorcycle / Dirt Bike	1	1%
Snowmobiling	1	1%

Note: Respondents could select multiple categories, percentages do not sum to 100%.

Business Conditions & Trajectory

This section captures the current health of responding businesses, including recent performance, future outlook, operational structure, and market context.

Non-profit responses are **excluded** from the analysis and discussion in this section.

Recent Performance

A slight majority of for-profit businesses report growth over the past three years (50%), though a meaningful share has declined (22%), with the remaining 28% reporting stable performance. This reflects the uneven recovery and shifting market conditions across outdoor recreation sectors.

Future Outlook

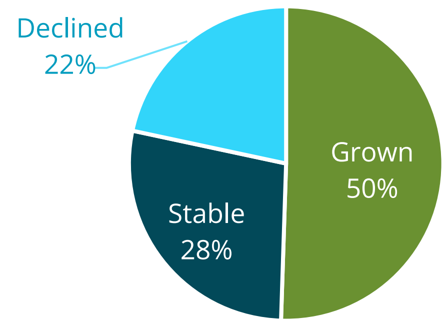
Looking ahead three years, expansion is the predominant aspiration among for-profit respondents, with 60% indicating plans to grow, indicating broad optimism even among businesses that have recently struggled. Another 29% aim to maintain their current size, while just 5% anticipate scaling back.

Business Tenure

Respondents represent a mix of newer and long-established businesses. For-profit businesses have been open an average of 29 years, though the gap between the mean and median reflects a skew toward more established operations, the median business age is 21 years, and the oldest business in the sample has been operating for 112 years. Approximately 56% of for-profit respondents identified as the original founder of their business.

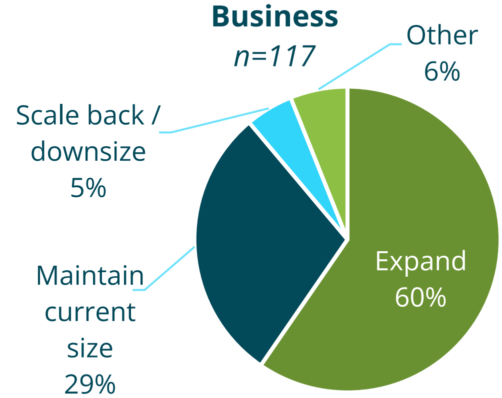
Business Trajectory (Past 3 Years)

n=97



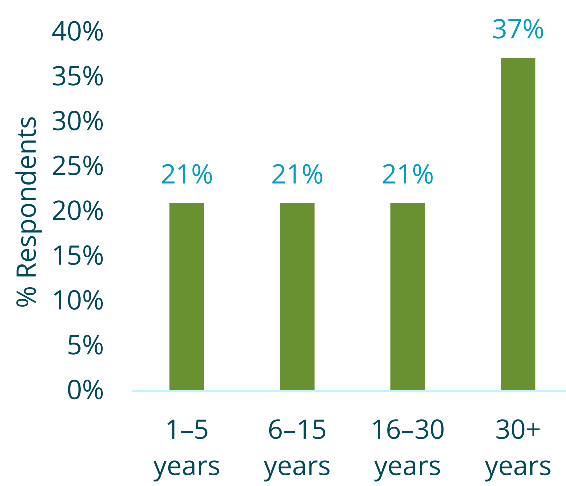
Plans for the Next 3 Years of Business

n=117



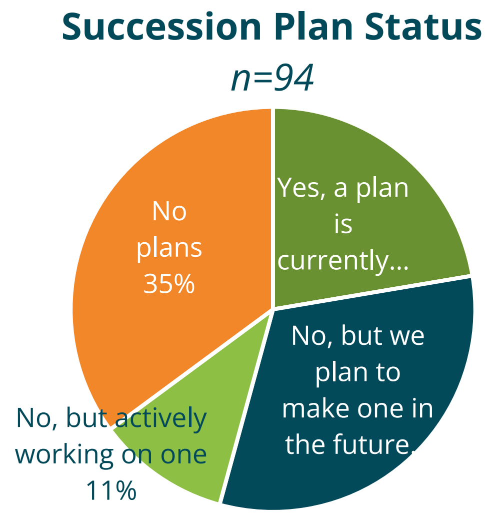
Years in Business

n=105

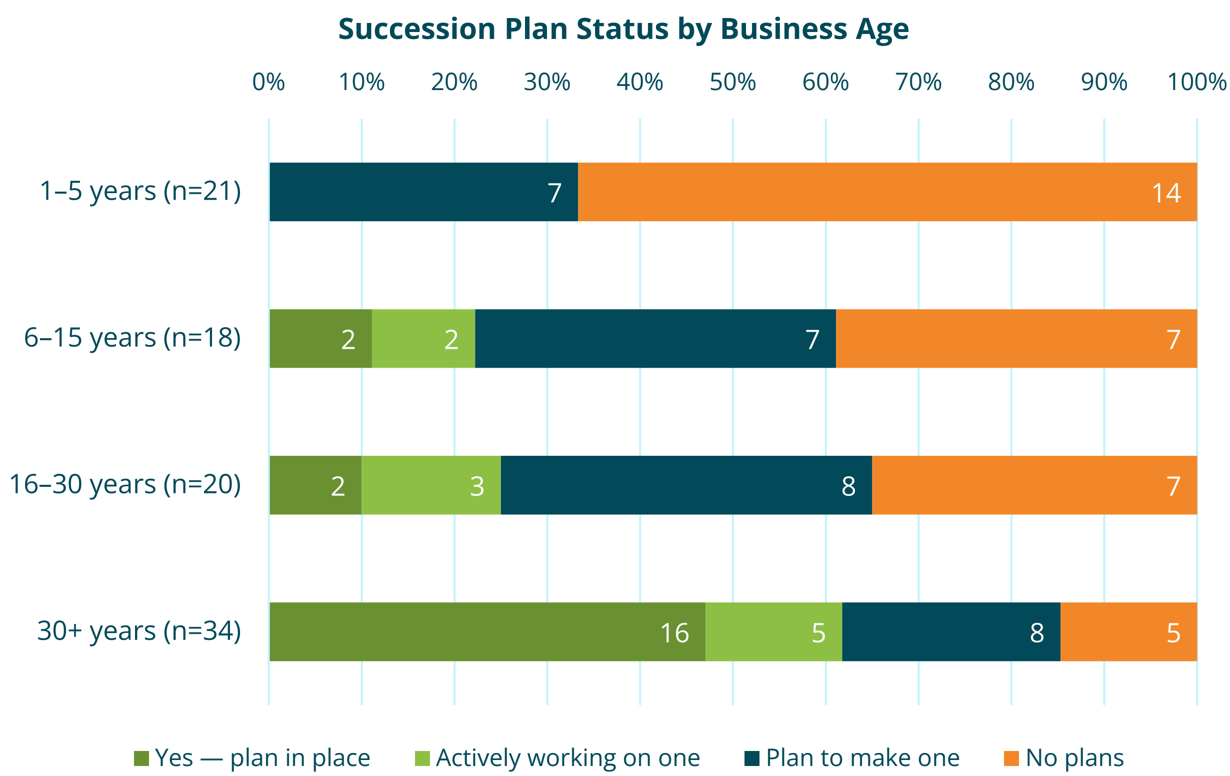


Succession Planning

The results indicate that most outdoor recreation businesses lack a formal succession plan, with only 22% reporting that one is currently in place. However, there is meaningful variation among those without a plan. Nearly half of respondents (43%) demonstrate at least some awareness and forward-looking intent, 32% plan to create a succession plan and 11% are actively developing one. In contrast, 35% of businesses report having no plan and no intention to create one, highlighting a substantial segment of businesses that may be particularly vulnerable to ownership transition challenges.



This vulnerability is especially important given the age profile of many businesses in the sample. A sizable share (41%) have been operating for more than 30 years, yet preparedness remains uneven. While succession planning increases significantly with business maturity, rising from just 0% of businesses open 1–5 years to 47% of those operating for 30+ years, a notable portion of long-established businesses still lack a plan. Biking businesses stand out as the least prepared: only 12% report having a plan in place, while half (50%) say they intend to create one "in the future" without having started, alongside 33% reporting no plans at all.

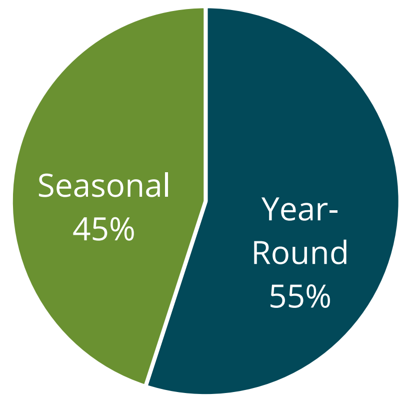


n shown per row = for-profit respondents answering both Q7 and Q27

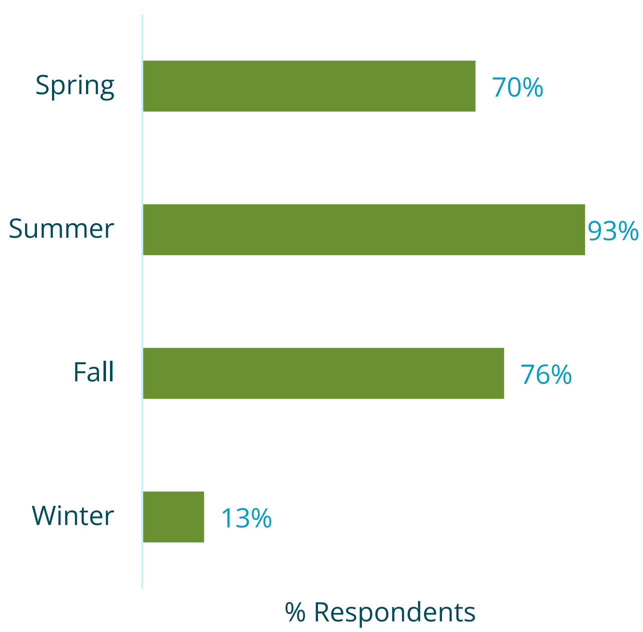
Seasonality

The majority of Massachusetts outdoor recreation businesses operate year-round, with 55% indicating no seasonal limitations on their operations. The remaining 45% operate seasonally, and among this group, summer operation is nearly universal (93% of seasonal businesses are open in summer) making it the dominant operating season across the industry. Winter remains a niche operating window, with only 13% of seasonal businesses active during that period. The most prevalent operating pattern among seasonal businesses is spring through fall, with 67% of seasonal respondents selecting all three warm-weather seasons. Taken together, these patterns underscore that while the Massachusetts outdoor recreation industry has a meaningful year-round core, nearly half of its businesses are concentrated in a compressed warm-weather window, a dynamic with significant implications for workforce planning, revenue stability, and the timing of policy and marketing support from the state.

Year-round vs. seasonal operations (n=103)

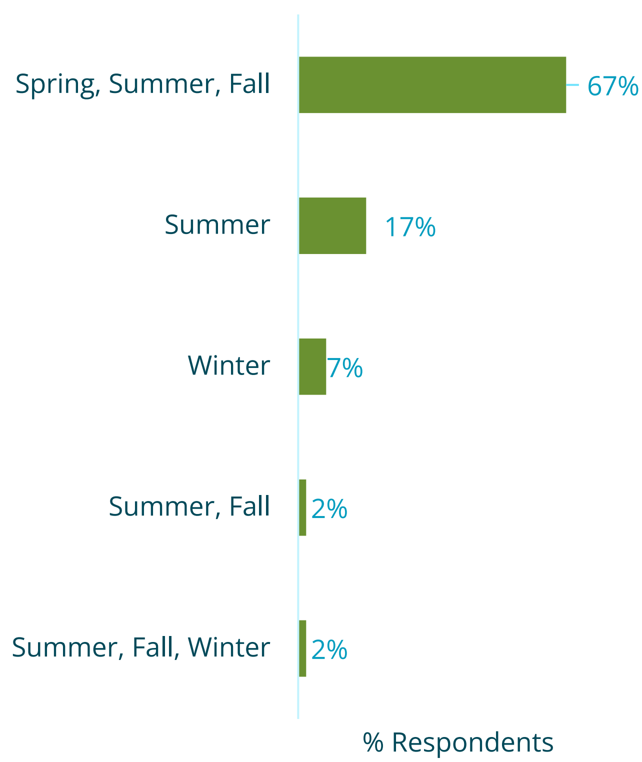


Of the 58 seasonal businesses — which seasons do they operate?
n=46



Respondents could select multiple answers. Percentages add up to over 100%.

Operating seasons among seasonal businesses
n=46



Employment

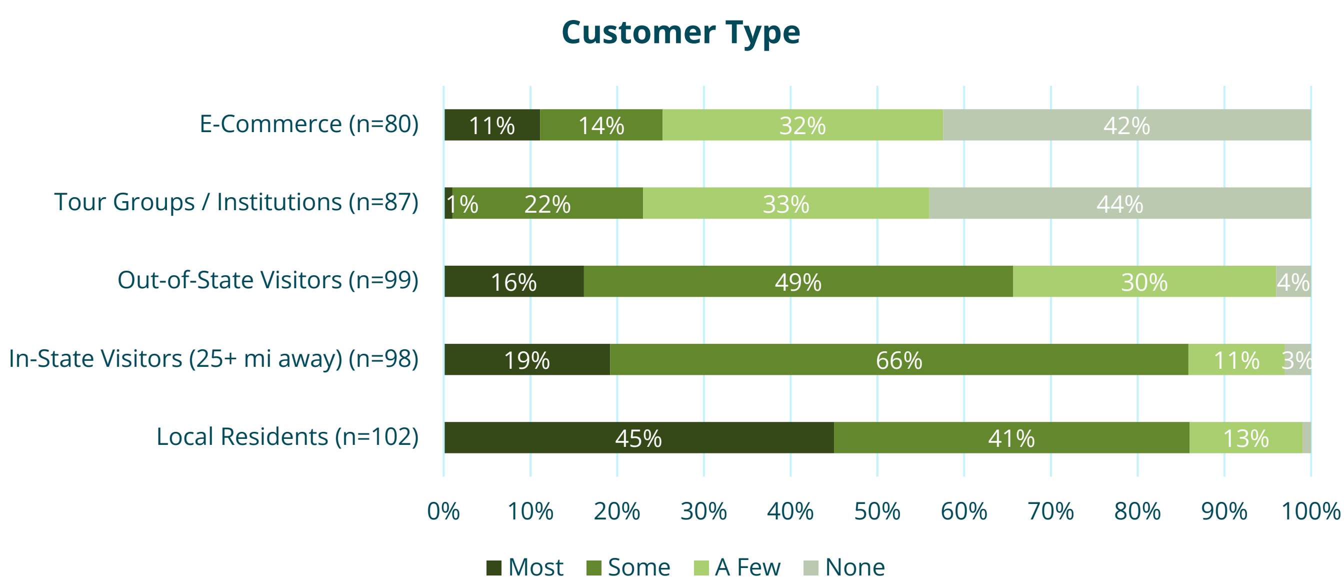
Employment across outdoor recreation businesses is highly uneven, with a small number of large operators, such as ski areas and camps, accounting for a disproportionate share of jobs. While average employment appears high in some categories, median values show that most businesses operate with very small teams, typically employing between one and three staff in each category. Seasonal employment plays a significant role, particularly part-time seasonal positions, but is similarly concentrated among a limited number of high-capacity providers.

Employment Type	Average Employees (Mean)	Typical Employees (Median)	Maximum Reported	Responses (n*)
Full-time, year-round	9.9	2	200	158
Full-time, seasonal	19.6	4	200	47
Part-time, year-round	5.3	2	30	37
Part-time, seasonal	55.1	4	1,600	61

**n reflects respondents reporting one or more employees in that category (zeros excluded). Means are skewed upward by a small number of large operators (ski areas, camps, marinas).*

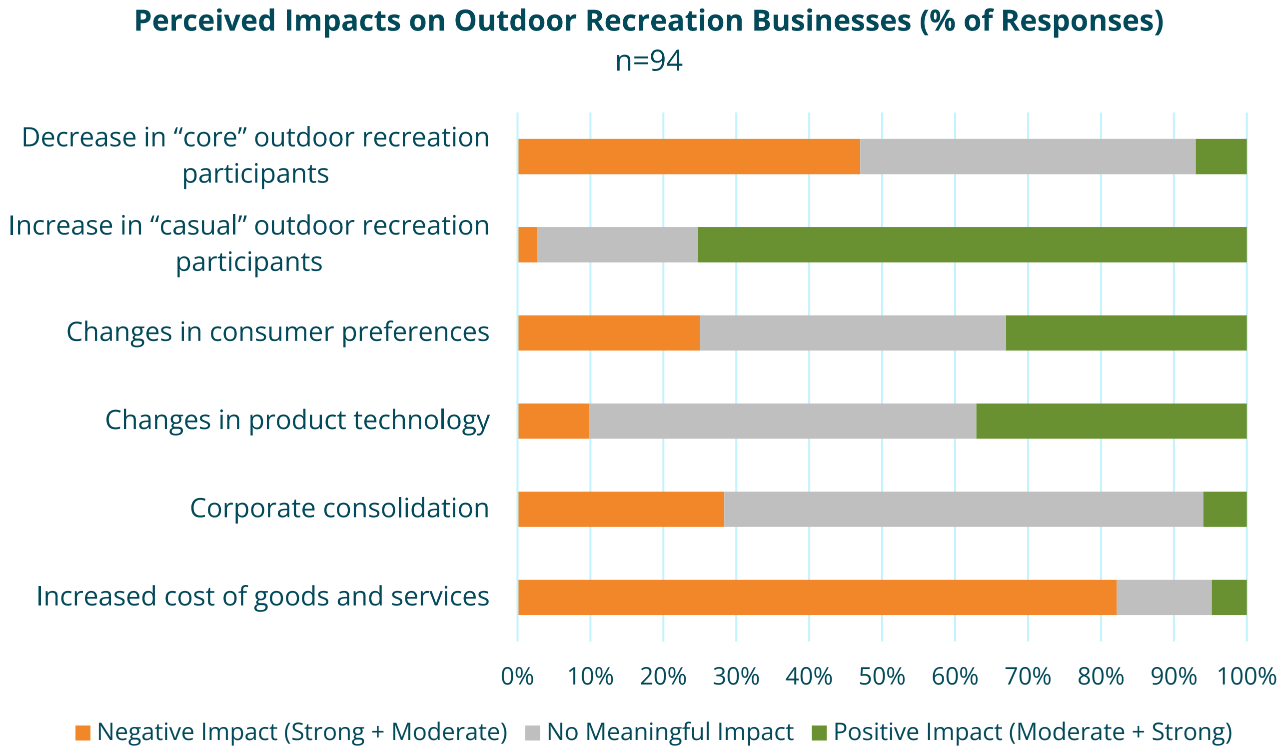
Customer Mix

Outdoor recreation businesses are primarily supported by local and regional customers. Nearly half identify local residents as their primary market, with most others also relying on them significantly. In-state visitors represent the most consistent secondary market, while out-of-state visitors contribute but are rarely the primary driver. Tour groups and e-commerce play a limited role. Overall, the sector is highly place-based, relying on local use and regional travel, with out-of-state tourism as a supplemental source of demand.



Market Trends

Respondents were asked how a range of broader market trends are affecting their businesses. Cost pressures are near-universal negatives, while the growth in casual outdoor recreation participants is a significant positive signal. Decreases in "core" participants is a meaningful concern for nearly half of businesses.



Several themes emerge from open-ended responses on industry trends:

- Tariffs are the most frequently mentioned acute concern in 2025–2026, affecting everything from bike components to ski equipment to fishing tackle.
- The rise of “casual” participants is broadly positive for operators (more first-time customers), but these participants tend to be more price-sensitive and less committed.
- E-bikes are simultaneously an opportunity (new market, state voucher program) and a disruption (DTC[2] competition, safety concerns, regulatory confusion).
- Tourism is declining: Multiple respondents across segments note a dramatic drop in international visitors and a softening of domestic leisure travel in 2024–2025.
- Online competition continues to erode local retail margins across cycling, tackle, and general outdoor gear.
- Family economic stress: Rising cost of living is reducing discretionary spending on outdoor recreation, particularly among working- and middle-class households.

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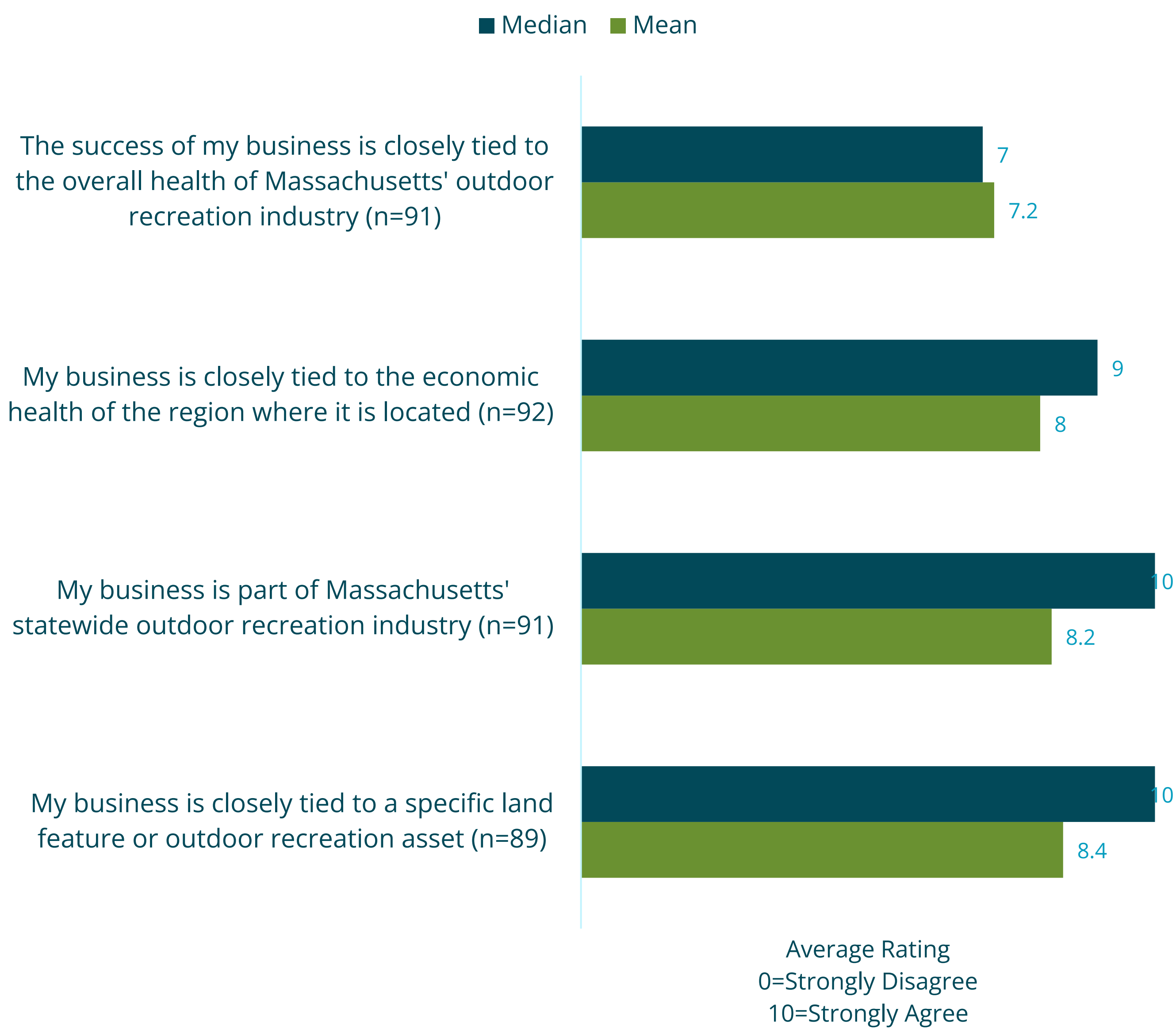
[2] Direct-To-Consumer

Industry Identity

Businesses were asked to rate their agreement with four identity statements on a 0–10 slider scale (0= Strongly Disagree, 10= Strongly Agree). Businesses report a strong sense of connection to place and the broader outdoor recreation economy. The highest agreement is with being closely tied to a specific land feature or outdoor recreation asset (mean score 8.4, median 10), highlighting the importance of natural resources and site-specific amenities to business identity. Respondents also strongly identify as part of Massachusetts' statewide outdoor recreation industry (mean 8.2, median 10) and see their success as linked to the economic health of their local region (mean 8.0, median 9), reinforcing both statewide and regional interdependence. While slightly lower, the connection between individual business success and the overall health of the statewide outdoor recreation industry (mean 7.2, median 7) still indicates a meaningful level of shared identity and reliance.

Outdoor Recreation Identity



Business Barriers & Constraints

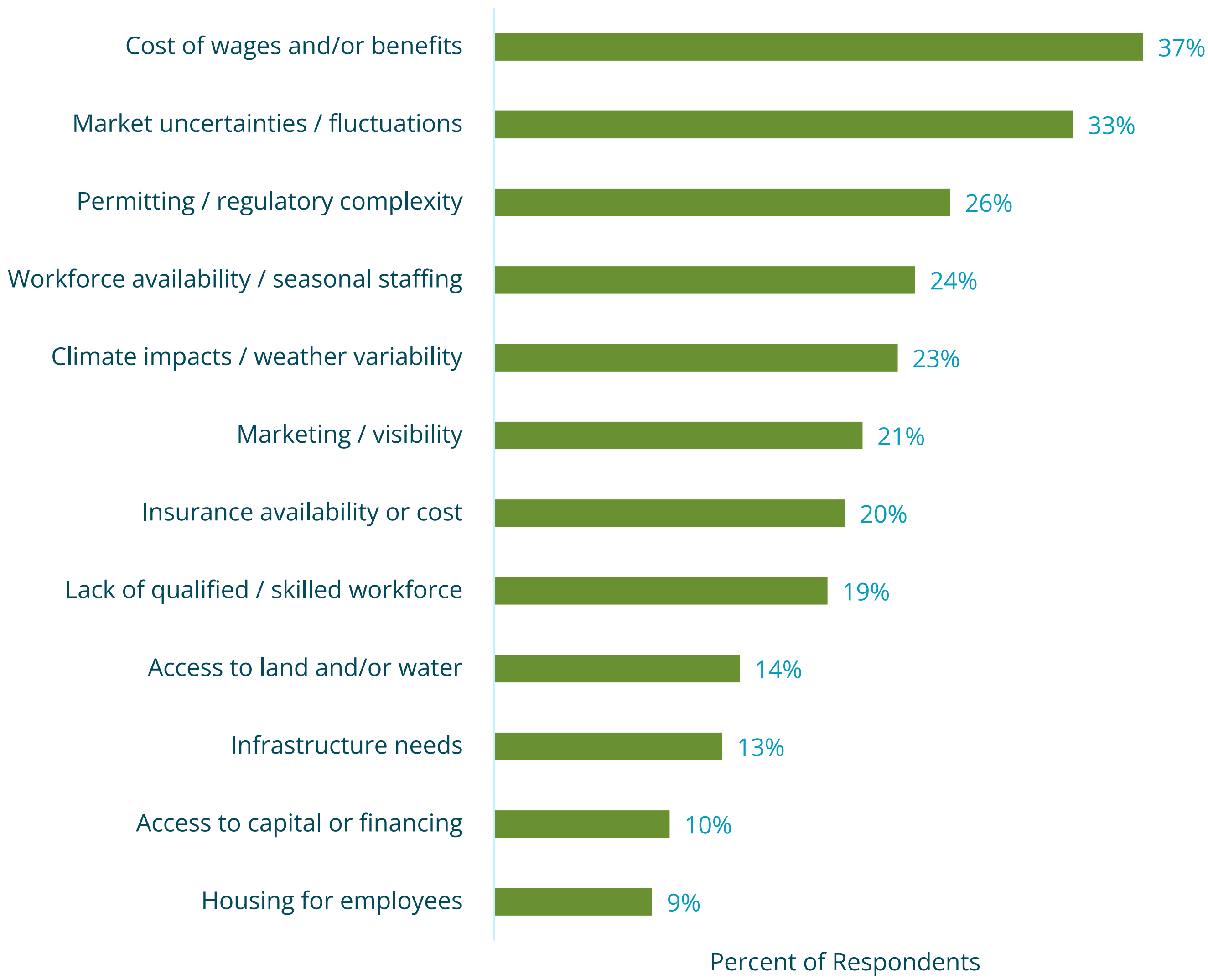
Respondents were asked to select up to three factors that most limit their ability to operate efficiently or grow. The results reveal a set of widespread economic pressures — cost of labor and market uncertainty — alongside sector-specific challenges such as climate variability and permitting complexity

Non-profit responses are **excluded** from some sections of the following analysis and discussion.

Top Barriers

Top Barriers to Business Growth & Efficiency

n=90



Percentages reflect share of respondents selecting each barrier; totals exceed 100% as respondents could select up to three. Nonprofits excluded (n=24).

Barriers by Business Activity Type

Barrier profiles differ notably across activity sectors and organizational type. The table below highlights the share of each segment selecting each barrier. *The outlined cells mark barriers 10+ percentage points above the overall average.*

	Biking	Boating	Paddling	Fishing	Snow-Based	Summer Camp	Equestrian
	n=31	n=20	n=27	n=36	n=23	n=20	n=13
Cost of wages & benefits	55%	15%	52%	14%	44%	55%	23%
Market uncertainties/fluctuations	39%	10%	37%	11%	22%	30%	23%
Workforce availability/seasonal staffing	29%	25%	33%	11%	35%	30%	15%
Climate/weather variability	13%	5%	15%	25%	22%	25%	46%
Insurance availability or cost	19%	25%	7%	11%	9%	15%	54%
Permitting/regulatory complexity	10%	35%	19%	28%	17%	5%	15%
Marketing/visibility	19%	5%	22%	19%	17%	30%	—
Lack of qualified/skilled workforce	26%	30%	19%	11%	17%	20%	15%
Infrastructure needs	16%	10%	11%	14%	9%	5%	23%
Access to capital or financing	13%	10%	15%	8%	17%	10%	8%
Access to land and/or water	—	15%	7%	14%	4%	—	—
Housing for employees	10%	10%	15%	—	9%	5%	—

- Cost of wages is the #1 barrier for Biking (55%), Paddling (52%), Summer Camp (55%), and Snow (44%) — well above the overall average of 36%.
- Insurance is the defining barrier for Equestrian at 54%, far above any other segment, unique to that sector.
- Permitting/regulatory complexity is notable barrier for Boating (35%) vs. the overall average of 21% — driven by the boater safety certificate issue.
- Climate/weather is the standout for Equestrian (46%) and secondary for Fishing (25%) and Snow (22%).
- Fishing is distinct, it's below average on nearly every labor/cost barrier, with permitting (28%) and climate (25%) as its top two.
- Workforce availability/seasonal staffing barriers show up strongly for snow-based businesses.
- Marketing/visibility shows up strongly for summer camps, where a big market creates lots of competition.

Climate as a Business Risk

Approximately 22% of all respondents[3] indicated that climate impacts and weather variability limit their ability to operate efficiently or grow. Beyond this, climate variability is identified as a cross-cutting risk in many open-ended responses, affecting a wide range of businesses. Impacts were noted not only by ski areas, but also by fishing guides (declining fish habitat), rowing programs (flood-related closures), equestrian operations (rising hay costs due to weather disruptions), and cycling businesses (storm damage to trails). Several respondents explicitly linked climate change to declining business viability over a 5–10 year horizon.

> "I have seen the habitat degradation over my lifetime on Cape Cod and now because of the changing climate and overfishing we are seeing a huge decline in our target species, the striped bass." — *Fly fishing guide*

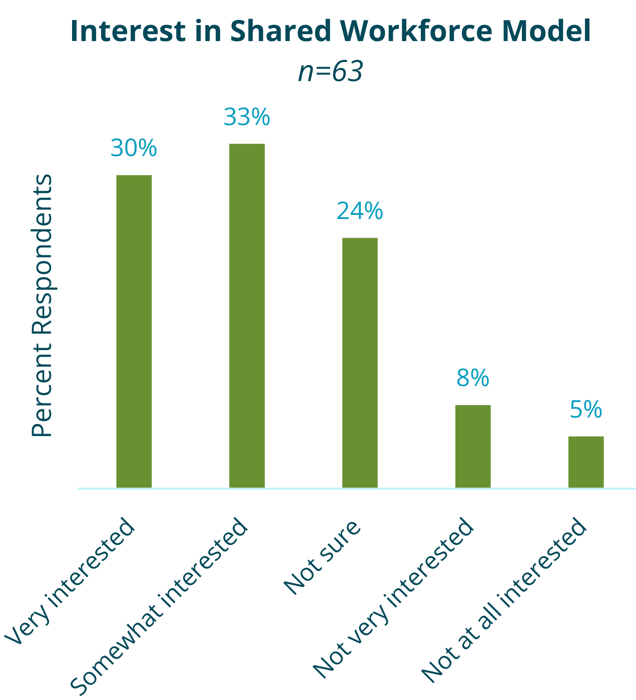
Workforce Development

Workforce challenges are a significant theme across the survey. Labor cost and availability are top-ranked challenges, and many businesses express interest in strategies that could help stabilize the outdoor recreation workforce, particularly shared workforce models and professional certification.

Non-profit responses are **included** in the analysis and discussion in this section.

Interest in a Shared Workforce Model

Respondents were asked about interest in a shared workforce model—where trained workers are shared across employers and seasons. The concept generated cautious but meaningful interest: 63% expressed at least some interest (30% "Very interested," 33% "Somewhat interested"), while 24% were unsure.



The most valued potential benefits were:

- Access to trained workers during peak seasons (61%)
- Ability to offer more stable, year-round employment (44%)
- Improved employee retention (39%)

However, concerns were substantial. Open-response feedback reveals the key barriers:

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[3] This discussion includes non-profit respondents.

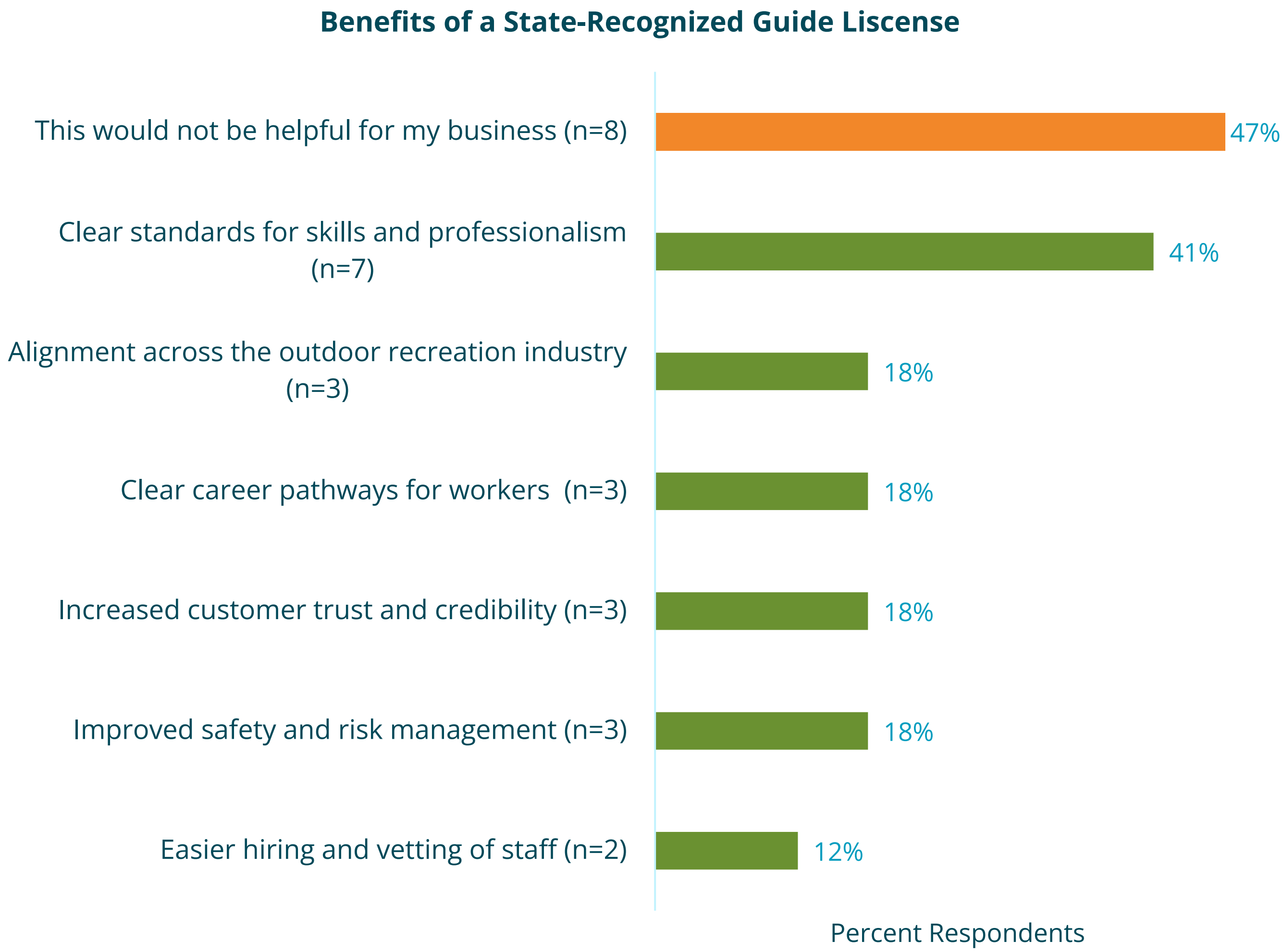
- Cultural fit and mission alignment: Operators worry that shared workers won't embody their brand or community values.
- Skill specificity: Many businesses (equestrian, licensed guide services, adaptive recreation) require certifications or experience that can't be easily transferred.
- Training investment protection: Businesses that invest heavily in training worry about workers being "poached" by competitors.
- Scheduling conflicts: Shared workers may not be available when each employer needs them most.
- Liability concerns: Questions about who is responsible for shared workers' actions and how misconduct would be handled.

> *"Employees must share the company's mission, vision, and values." — Outdoor provider*
>
> *"Given the nature of my business and my customers, one of my concerns is that workers moving from one company to another may not have the cultural awareness regarding how BIPOC individuals perceive the outdoors." — BIPOC outdoor recreation business*
>
> *"Everything we do here is proprietary and our internal cost to train is not conducive to seasonal employees." — Resort operator*

State-Recognized Certification or Guide License

Respondents were asked how valuable a state-recognized certification or guide license would be for their business or workforce, and the results were mixed—indicating that perceived value varies widely by business type. Guide services and outfitters are likely to see the greatest benefit, while retail and manufacturing businesses may find it less relevant.

Only 20 respondents answered this question. Of those, 40% indicated that a certification would be at least somewhat valuable, while 25% said it would not be helpful. The most valued potential benefits were the establishment of clear skills standards and professionalism benchmarks (41%). Notably, a plurality of respondents (47%) reported that such a certification would not be applicable to their business at all; potential interest is highly sector-specific.



Business Support Needs

A central focus of the Massachusetts Outdoor Industry Pathways initiative is understanding what forms of industry organization and coordination would be most valuable to businesses. This section covers current engagement with business networks, state agency relationships, and preferred types of shared support.

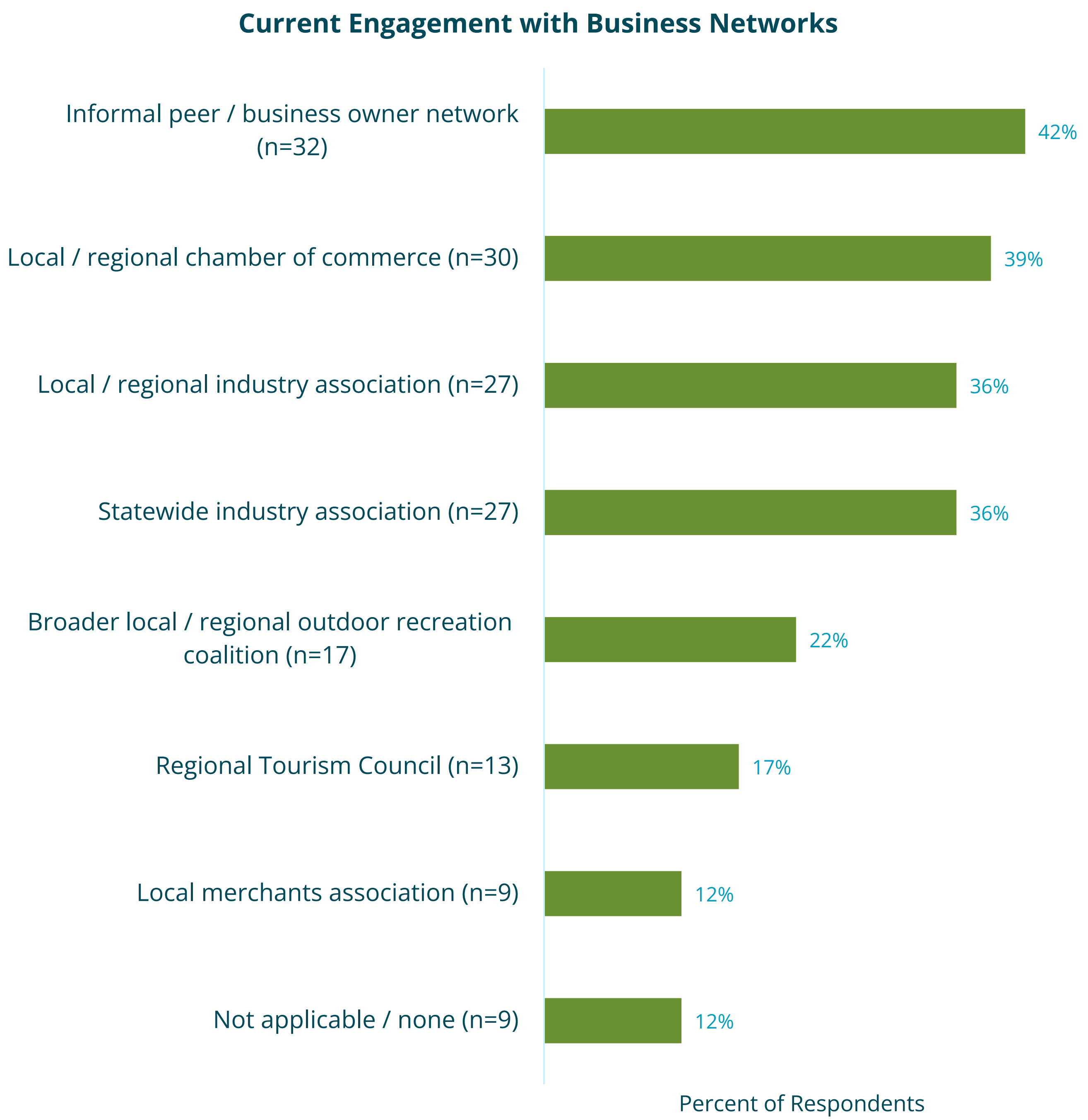
Non-profit responses are **excluded** in the analysis and discussion of this section.

Engagement with State Agencies

Awareness and engagement with state agencies is limited across the for-profit outdoor recreation business community. Only 26 of 230 for-profit respondents (11%) indicated any engagement with a state office. Among those who do engage, MOTT and MOOR are nearly equally cited, reached by 54% and 50% of engaged respondents respectively, while the Massachusetts Office of Business Development sees minimal engagement (8% of those who engage, just 2 businesses overall). Respondents also noted interactions with agencies such as the Department of Conservation and Recreation, Division of Marine Fisheries, and Department of Agriculture through write-in responses.

Current Engagement with Business Networks

Engagement is strongest in informal peer networks and local business infrastructure, with 42% of for-profit respondents participating in informal peer or business owner networks and 39% engaged with local or regional chambers of commerce. Statewide and local/regional industry associations are equally represented at 36% each, suggesting meaningful but not dominant engagement with formal industry bodies. Notably, 12% report no network engagement at all, indicating a segment of businesses that remain disconnected from collaborative and advocacy opportunities.



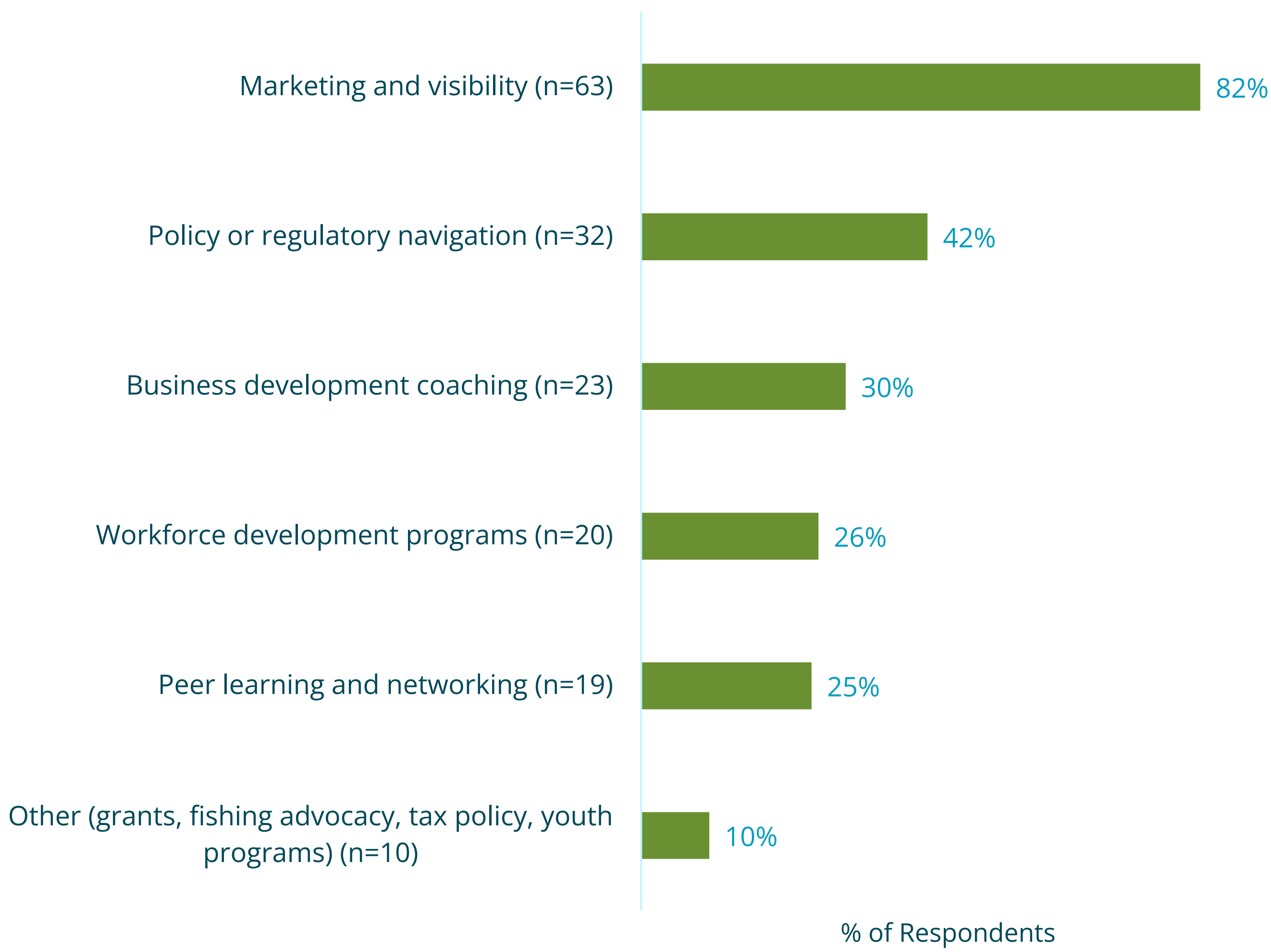
Shared Support Needs

Marketing and visibility clearly stand out as the most widely shared need, cited by 82% of for-profit respondents—**almost double any other category**. This underscores a broad demand for improved promotion and discoverability of outdoor recreation businesses among residents, visitors, and policymakers alike.

A second tier of needs includes policy or regulatory navigation (42%), followed by business development coaching (30%), workforce development programs (26%), and peer learning and networking (25%). These results suggest that beyond marketing, businesses are seeking practical support to navigate complex regulations, strengthen operations, and build connections within the industry. A smaller share of respondents (10%) identified other needs such as grants, advocacy, tax policy, and youth programming.

Overall, the findings point to marketing as the most universal priority, complemented by a range of capacity-building needs to help businesses operate more effectively and grow.

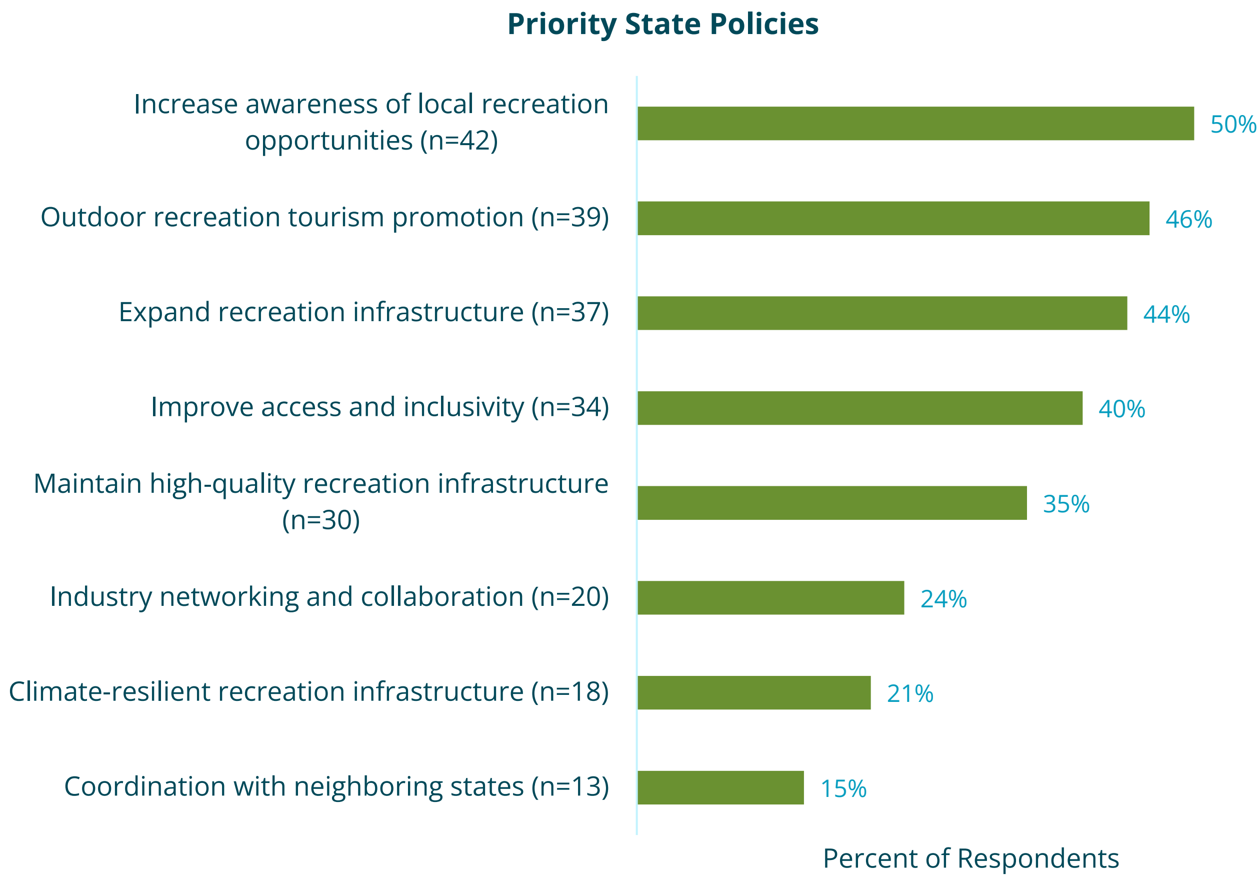
Types of Shared Support Needs



State Policy Priorities

Respondents were asked to select their top three priorities for the state to focus on in supporting the statewide outdoor recreation industry. Responses point toward awareness, tourism promotion, and infrastructure investment as the most pressing areas, with notable variation across segments.

> *"Please consider opening state recreation-related grants to qualified businesses—alongside nonprofits and public agencies—to strengthen the sector by encouraging broader participation, improving equity, and ensuring that the best-prepared organizations can deliver high-quality, accessible outdoor experiences." — Outdoor guiding business*



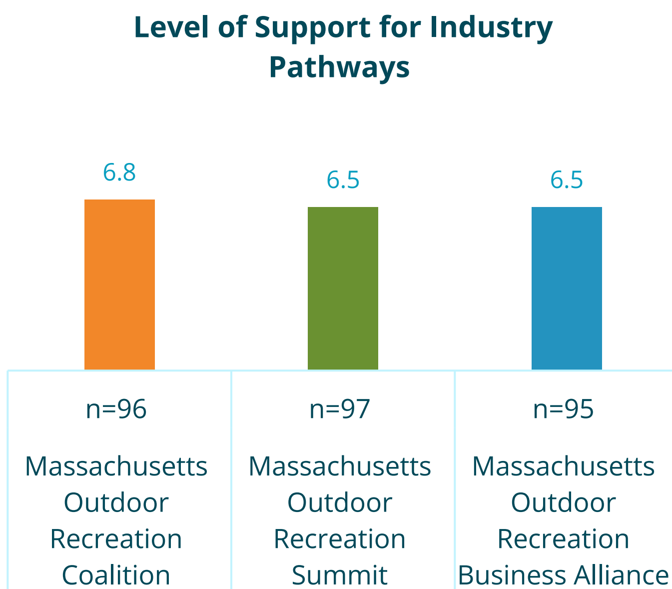
Meaningful Trends by Activity

- Biking is the only segment where improving/expanding infrastructure is the clear #1 at 70% of biking businesses— 26 points above the overall average and far above every other segment's infrastructure score.
- Paddling and snow-based both have higher priorities around tourism promotion (67% and 69%), both are experience-driven sectors that depend on visitor traffic.
- Fishing also prioritizes tourism promotion at 59%, reflecting the segment's desire for state-level promotion of Massachusetts fisheries comparable to peer states like Florida and Louisiana.

Industry Organizing Pathways

Massachusetts' outdoor recreation sector is diverse and growing, but it currently lacks a coordinated industry-wide structure to connect businesses, nonprofits, and partners around shared goals. Establishing a more organized framework, or "pathway," can strengthen communication, amplify the industry's voice, and create lasting support systems that help the sector thrive.

The following pathways represent different models for how the outdoor industry could organize and collaborate in Massachusetts. These options are not mutually exclusive but serve as starting points for discussion about what structure, or combination of structures, best fits the Commonwealth's needs.



Survey respondents were asked to respond to a series of questions gauging these pathways relevancy to their business and their level of interest/support for a given pathway.

*Non-profit responses are **included** in the analysis and discussion in this section.*

For more detailed information of each of these pathways or to view examples, click here.

Massachusetts Outdoor Recreation Coalition

A broad, cross-sector network of public, private, and nonprofit actors. With moderate commitment through working groups and joint initiatives, it builds alignment across sectors, enhances coordination, and supports shared problem-solving.

Massachusetts Outdoor Recreation Summit

A recurring, low-commitment gathering for connection, knowledge sharing, and community-building. Participants can attend or help plan events, with a focus on visibility, education, and identifying shared priorities.

Massachusetts Outdoor Recreation Business Alliance

A member-driven organization focused on business development, workforce, marketing, and policy advocacy. This pathway involves moderate to high commitment, including membership dues, regular meetings, and participation in initiatives to strengthen the business voice and drive industry growth.

Support for Organizing Pathways

Respondents were asked to rate three proposed industry organizing pathways on how much each would benefit their business and benefit the statewide industry overall, using a 0–10 scale (where 10 indicates "extremely beneficial" and 0 indicates "no benefit"). All three pathways received moderate-to-strong support, with the Coalition pathway receiving the highest average score. **However, the broadly similar ratings suggest that the specific structure matters less than whether any structure delivers real value to businesses**.

Open-ended responses reveal a consistent perspective: the outdoor industry needs a structure that has teeth, year-round presence, and real policy influence.

Specific concerns about Pathway participation include:

- Dues and administrative burden: Small, resource-constrained businesses worry about the time and cost of participation.
- Meaningful impact vs. talk: Respondents want to see concrete policy wins—not another forum for sharing challenges.
- Geographic equity: Western Massachusetts businesses feel underrepresented in Boston-centric discussions.
- Sector diversity: The outdoor industry spans very different business models and regulatory environments; a single coalition may struggle to represent all of them effectively.

> *"A combination works best. A recurring Summit builds connection and visibility, but the biggest impact will come from a Business Alliance or Coalition that can maintain momentum year-round and represent the sector on practical issues like permitting, regulations, workforce, and infrastructure."* — Boat rental operator
>
> *"I am not sure creating another alliance or coalition will really move the needle. I feel our local chamber needs to promote outdoor recreation as a real driver of tourism to our region."* — Bike shop
>
> *"Lobbying is essential to the state budget line items necessary for recreational boating. Any additional organizations which can also lobby are essential."* — Boatyard operator

Pathway Support by Business Type

Guides are the most supportive across all three pathways, with Business Alliance and Coalition scores around 7.2–7.3, reflecting their reliance on shared infrastructure and coordination. Manufacturers are clear outliers, with lower scores (4.2–5.2), suggesting more limited perceived relevance, though the sample is small (n=5).

Across segments, the Coalition is the most consistently favored option (6.8 vs. 6.5 for Summit and Business Alliance). Retail and B2B service businesses show a slight preference for the Summit, likely valuing event-based visibility and networking.

Overall, responses indicate broad but moderate support: most ratings fall in the 7–10 range, with few low scores, pointing to general openness without strong consensus around a single pathway.

Pathways Support by Business Type

Business type	n	MA Outdoor Recreation Coalition	MA Outdoor Recreation Summit	MA Outdoor Recreation Business Alliance
General Retail	14	6.8 n=8	7.1 n=9	6.2 n=8
Specialty Retail	38	6.9 n=28	6.7 n=29	6.3 n=28
Outfitter / Rentals	29	6.9 n=19	6.9 n=19	7.1 n=18
Guide	44	7.3 n=31	7.0 n=32	7.2 n=31
Provider / Operator	41	6.9 n=30	6.7 n=30	6.8 n=30
Organizer / Affinity	15	6.8 n=9	6.9 n=9	7.2 n=8
B2B Services	9	6.8 n=8	7.2 n=8	6.9 n=8
Manufacturer	7	4.2 n=5	4.6 n=5	5.2 n=5
Overall		6.8 n=96	6.5 n=97	6.5 n=95

Future Engagement Interests

When asked about their desired level of involvement in future outdoor recreation industry organizing, respondents indicated strong overall interest in staying connected.

- 84% want to receive updates via email list
- 52% are interested in attending industry pathway events
- 20% want to be actively involved in establishing an organizing pathway
- Only 3% do not wish to be involved in future organizing

BIPOC-Owned Business Spotlight

Eight respondents (6% of those who answered the question) identified as BIPOC-owned businesses, indicative of a significant participation gap in the industry relative to the Commonwealth's overall demographics. Results for this segment should be interpreted with caution given the limited sample size; however, several patterns are worth highlighting as they reveal nuanced perspectives on what makes entry and success difficult.

Non-profit responses are **included** in the analysis and discussion in this section.

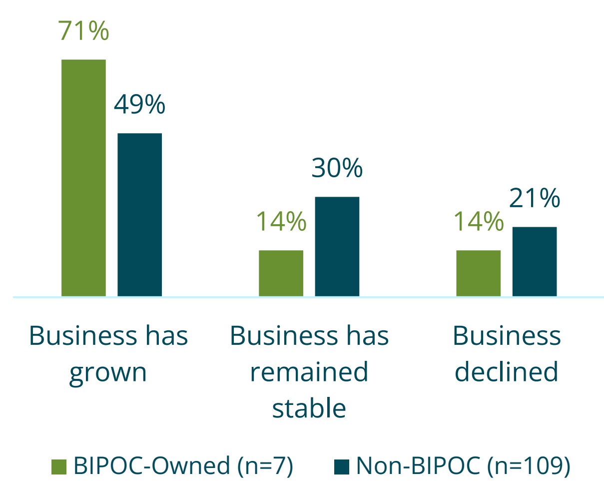
Business Performance

The results indicate that BIPOC-owned businesses in this sample report stronger recent performance and more ambitious growth outlooks than their non-BIPOC counterparts, though the small sample size (n=7) warrants cautious interpretation. Over the past three years, 71% of BIPOC-owned businesses report growth, compared to 49% of non-BIPOC businesses and 50% overall. This pattern likely reflects, in part, differences in business maturity: BIPOC-owned businesses have a median age of 4 years, compared to 22 years for non-BIPOC businesses. Notably, the longest-running BIPOC-owned business in the sample has operated for 32 years, indicating a mix of newer ventures alongside more established enterprises.

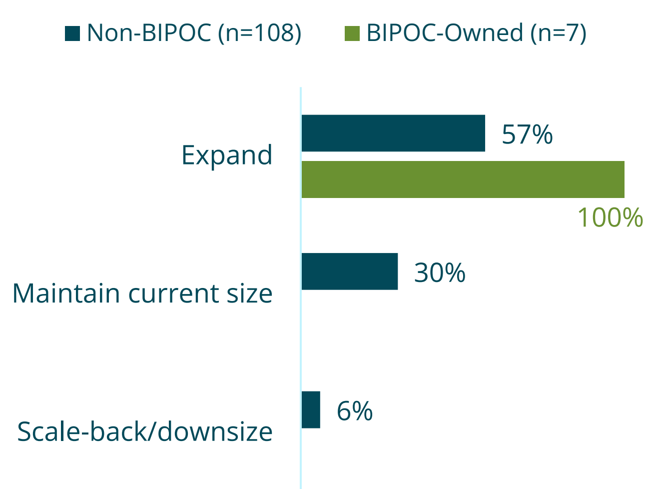
Looking ahead, the contrast is even more pronounced. All BIPOC-owned respondents (100%) indicated plans to expand over the next three years, compared to 57% of non-BIPOC businesses and 60% overall. Notably, no BIPOC-owned businesses reported plans to maintain, scale back, or pursue other strategies, while non-BIPOC businesses showed a more mixed outlook, with 30% planning to maintain current size and smaller shares anticipating contraction or alternative paths.

Overall, while limited in scale, the data points to a group of BIPOC-owned businesses that are both growing at higher rates and expressing strong confidence in continued expansion.

BIPOC vs Non-BIPOC Owned Business History (Past 3 years)



BIPOC vs Non-BIPOC Owned Business Trajectory (Next 3 years)



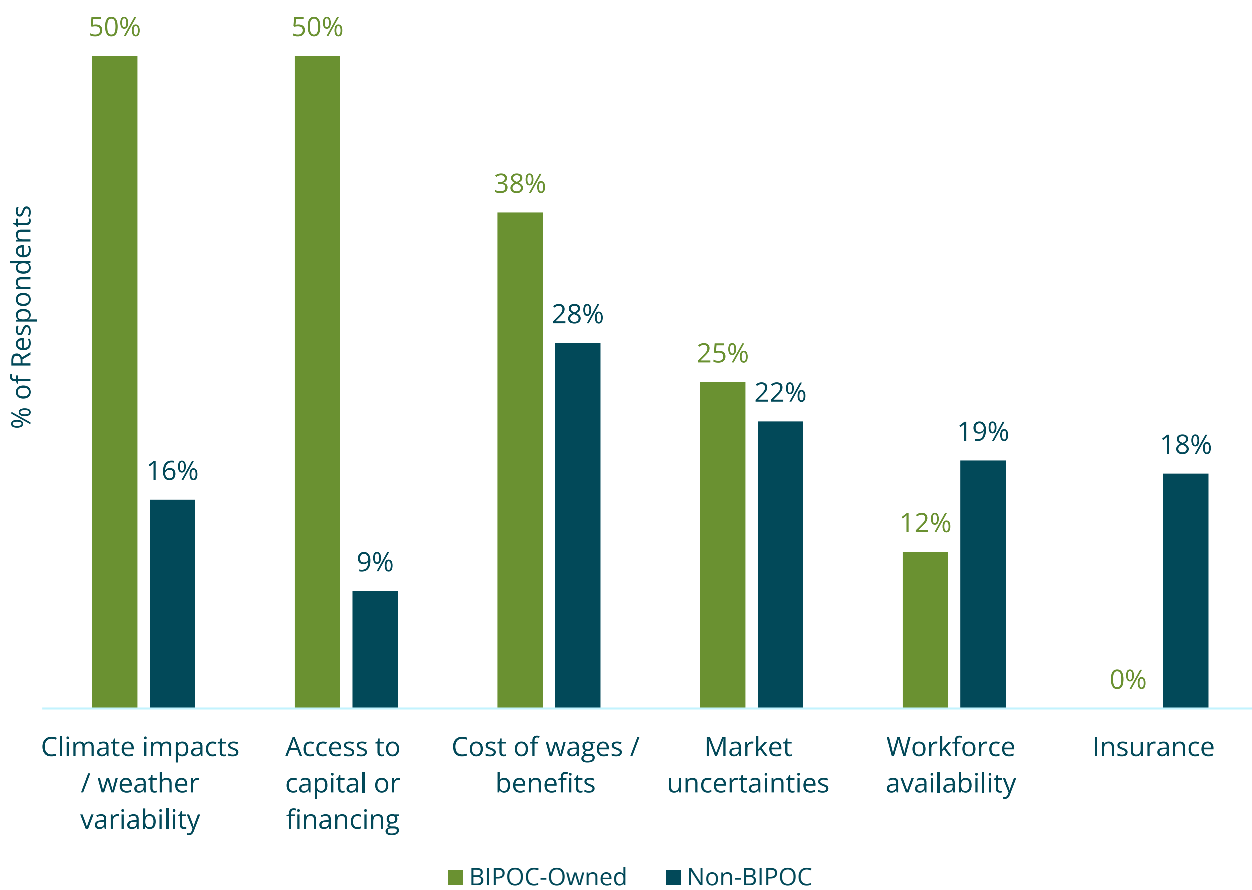
Top Barriers

The results highlight a distinct set of challenges facing BIPOC-owned businesses, particularly around climate impacts and access to capital. Half of BIPOC respondents (50%) identified both climate variability and financing as key barriers—substantially higher than non-BIPOC businesses (16% and 9%, respectively). This suggests that BIPOC-owned businesses may be more exposed to environmental risks and face greater difficulty securing funding to adapt, invest, or grow.

Labor and market pressures are also present but show less divergence. Cost of wages and benefits is a concern for 38% of BIPOC businesses compared to 28% of non-BIPOC businesses, while market uncertainty is reported at similar levels (25% vs. 22%). In contrast, workforce availability appears to be less of a constraint for BIPOC businesses (12% vs. 19%).

Overall, while both groups face common economic challenges, BIPOC-owned businesses stand out for their heightened concerns around climate resilience and access to capital—two factors that are critical to long-term stability and growth.

BIPOC vs Non-BIPOC Owned Business Barrier Comparison



Respondents who serve BIPOC customers or have personal experience in BIPOC communities identify several overlapping barriers:

> *"Cost and lack of knowledge. Lots of people want to get out and try these outdoor sports, but for something as simple as hiking, you need the right shoes, access to transportation to the trailhead, an understanding of norms, and a plan. Beyond this, things like mountain biking, skiing, and rock climbing all have high costs." — BIPOC-Owned Outdoor recreation business*

- Cost of equipment and participation fees—especially for gear-intensive activities (skiing, climbing, mountain biking)
- Transportation barriers to trailheads and outdoor venues
- Lack of community—wanting to try new activities but not wanting to be the only person who looks like them in a space
- Cultural stigma: some BIPOC community members have internalized the perception that certain outdoor activities are "not for us"
- Immigration enforcement climate in 2025–2026 is creating a chilling effect on outdoor participation in immigrant communities
- Geographic concentration of outdoor recreation in predominantly white, high-income communities

Other BIPOC-Business Perspectives

> *"I'm a mixed race 20-something who has grown up in Massachusetts. I was blessed with access to outdoor spaces from a very young age and quickly realized that there was usually no one that looked like me in these spaces. All I want is to make these spaces more diverse." — BIPOC outdoor recreation business owner*

BIPOC-identifying businesses were asked to respond to additional statements about their experience. Given the very small number who completed this section, results are directional only.

- All respondents who answered agreed (or strongly agreed) that efforts to increase outdoor participation among BIPOC, low-income, and people with disabilities would benefit their business.
- A majority disagreed or strongly disagreed that there is a clear and defined path for BIPOC communities to get started in outdoor recreation in Massachusetts — a significant equity signal.
- Respondents were divided on whether being a BIPOC-owned business is part of how they advertise or promote their goods and services.

Cultural Affinity Partnerships

Overall, 18 respondents (13%) reported that they partner with ethnic or culturally-specific outdoor affinity groups or events (e.g., Outdoor Afro, Black Birders Week). While not limited to BIPOC-owned businesses, this represents a meaningful base of organizations already building culturally relevant connections to outdoor recreation.

MOOR Inclusive Recreation Grants

MOOR's Inclusive Recreation Grant program receives the most consistent positive mentions in the survey from organizations working in this space. Several adaptive recreation nonprofits and BIPOC-serving organizations cite it as transformative, not only for funding but for legitimizing their work in conversations with cities, towns, and other funders.

> *"MOOR's grant program and its office has legitimized my work when it comes to making outdoor access a priority with cities and towns. The fact that the state is behind this means it's serious." — Outdoor equity organization*

Calls to Action from BIPOC Business Owners

- The state should celebrate BIPOC communities' long history of outdoor recreation and exploration, not just frame them as "under-represented".
- Grant programs and state investment should reach for-profit BIPOC businesses, not just nonprofits.
- Underserved communities should be meaningfully included in the design of future surveys and planning processes.
- Outdoor equipment should be connected to healthcare—framed as a medical tool to unlock new funding streams.

Industry Sector Breakdowns

Non-profit responses are **included** in the analysis and discussion in this section.

Fishing & Coastal Water Recreation

This is one of the most represented and vocal segments in the survey.

36 respondents offer fishing-related services and/or products (~24% of all survey participants).

Image 1. Duxbury Harbor, Photo By Ted Curtain, Courtesy Of MOTT

Respondents include saltwater fishing guides, charter captains, tackle shops, fly-fishing guides, and marina/boatyard operators. Respondents operate primarily on the coast—Cape Cod, the North Shore, Boston Harbor, and the South Shore—with some freshwater operations in the interior.

Key Business Characteristics

> *"Been on the water all my life. No better occupation than to go fishing and see people happy"*
> *- Fishing Charter, North Shore*

- Highly seasonal with strong summer peaks; some year-round via winter fishing
- Small operations: typically 1–5 staff, often sole proprietors or family-run
- Revenue tied directly to fish populations, weather, and regulatory conditions
- Heavy reliance on repeat customers and word-of-mouth marketing
- High licensing requirements (USCG captain's license) limit workforce pool

Top Challenges

Fishing-sector respondents are among the most unified in the survey—they share a common existential concern:

> *"The striped bass and bluefish populations have been declining for years due to poor fisheries management. Close the commercial season and make the striped bass a gamefish."* — Fishing guide, Cape Cod
>
> *"Boat ramp access. Customer parking. Zero support from the state, town, Chamber of Commerce, and county governments to promote Massachusetts fishing. Florida and Louisiana do an amazing job at this. We have some of the best fishing in the world and zero promotion."* — Charter captain, Cape Cod

- **Declining Fish Populations**: Multiple respondents cite declining populations of fish as the primary business threat. National Marine Fisheries Services (NMFS) and state fisheries management—specifically continued commercial harvest—are blamed.
- **Dockage and infrastructure**: A lack of accessible docks for passenger loading/unloading is a pervasive operational constraint.
- **Insurance and licensing costs:** Rising premiums and complex regulatory requirements increase overhead.
- **Tariffs:** Fishing tackle and equipment costs have increased materially due to tariffs on imported goods.
- **Boating safety certification requirements:** New multi-day course requirements for rental operators are seen as mismatched to low-risk, dock-managed operations.
- **Tourism decline:** Multiple operators report the complete disappearance of international visitors, and reduced visitation from Boston-area day-trippers.

Tailwinds & Opportunities

- Strong post-COVID demand for on-water experiences—especially social boating and group outings.
- Youth fishing programs have seen "insatiable demand".
- Fly fishing is growing, partly driven by social media and the post-COVID outdoor surge.
- Some operators have added boats and expanded significantly despite headwinds.
- Electric boats (e.g., Boston Electric Boats) are growing a new market segment with minimal regulatory friction.

What Respondents Want from the State

- A "Fish Massachusetts" marketing campaign analogous to Florida's fishing promotion.
- Gamefishing status for striped bass (end commercial harvest).
- Better dockage infrastructure and boat ramp access.
- Simplified, risk-appropriate regulatory pathways for low-horsepower rental operators.
- State charter directories, tourism listings, and fishing destination marketing.

Bicycling: Retail, Repair, & Trail-Based Businesses

Bicycling businesses span a wide range—from full-service bike shops offering sales, repair, and e-bike service to a repair-only specialist, and a touring operator.

31 respondents offer bicycling-related services and/or products (~21% of all survey participants).

They are distributed across Greater Boston, Western Mass, Berkshire County, and the North Shore.

Image 2. Learn to Ride Event, Malden, photo by Colgan Johnson 1981 Photography Co

Key Business Characteristics

- High inventory costs and thin margins, especially as direct-to-consumer brands undercut local shops.
- Growing e-bike market presents both opportunity and disruption.
- Many are founder-owned, running on passion for cycling with limited business infrastructure.
- Strong community orientation—bike shops often double as community hubs
- Trail access constraints: riders often travel out of state for quality trails.

> *"I purchased a local business that I was employed at because of the lifestyle. I was an avid cyclist and felt that the community needed a local shop that supported group rides and the cycling community." – Bike shop, Berkshires*

Top Challenges

- **Direct-to-consumer competition:** Trek, Amazon, and Direct-to-Consumer e-bike brands are undercutting local shops on price, often with inferior quality and safety standards (e.g., uncertified lithium batteries).
- **Industry oversupply and discounting:** Post-COVID inventory gluts have compressed margins across the sector.
- **E-bike regulatory confusion:** Hastily developed regulations and inconsistent enforcement create uncertainty.
- **Tariffs:** Significant cost increases on imported components, frames, and accessories.

- **Trail access and infrastructure:** A persistent shortage of accessible mountain bike trails in Massachusetts forces riders out of state.
- **Workforce:** Finding and retaining skilled mechanics is difficult, especially at sustainable wages.

> *"Bicycle and eBike margins are constantly diminishing due to costs of freight, labor, inflation, and pressure to price match against unscrupulous retail giants such as Amazon."* — Bike shop owner, North of Boston
>
> *"We have divorced ourselves from the larger industry as much as we can. We rely on used inventory to make sure we have what is needed for our customers."* — Bike shop, Western Mass

Tailwinds & Opportunities

- Massachusetts e-bike voucher program: Cited positively by multiple shops, generating significant additional sales and extending winter employment.
- Growing commuter and utility cycling market, especially in urban areas.
- Community partnerships (e.g., youth mountain bike camps, cycling nonprofits) drive referrals.
- Repair-focused business models may be more resilient than retail-forward models.
- Bike touring (e.g., Pioneer Valley farm bike tours) represents an emerging niche.

What Respondents Want from the State

- More and better-maintained mountain bike trails and bike infrastructure.
- Bike lane investment across urban, suburban, and rural areas.
- Community pump tracks and traffic gardens.
- Improved e-bike regulation that protects consumers and supports responsible local dealers.
- State-funded job training programs for outdoor industry workers.

Paddlesports, Sailing, Rowing & Water-Based Recreation

This segment includes kayak and canoe rental/tour operators, sailing schools and yacht clubs, rowing nonprofits, a dragon boating club, whitewater rafting operators, and an electric boat rental company.

Image 3. Paddlers on the Deerfield River, Courtesy of MOTT

48 respondents offer paddling, sailing, surfing, or other boating-related services and/or products (~33% of all survey participants).

Their operations span Boston Harbor, the Connecticut River, Western Massachusetts waterways, Cape Cod, and Berkshire lakes.

> *"Our business grew organically out of my enjoyment for paddling and a desire to improve the community that I came from. We basically lose our shirts providing affordable rentals to community members, school groups and tourists then make up the difference by selling nice boats to wealthy out-of-towners."* – Canoe/kayak business, Orange MA
>
> *"That's when the idea clicked: the view of Boston from the water is the best view in town, but most people never get to experience it in a private setting, and almost nobody gets to feel what it's like to be at the wheel of their own boat. I saw a real community need for a safe, approachable way for locals and visitors to get on the harbor and feel that sense of freedom and adventure."* – Boat Rentals, Boston

Key Business Characteristics

- Strong demand for on-water experiences, particularly in the post-COVID outdoor surge.
- Highly weather- and water-condition-dependent operations.
- Many have a significant nonprofit or community service dimension.
- Sailing and rowing require certified instructors; workforce is a consistent challenge.
- Paddlesports face a globally challenging market environment.

Top Challenges

> *"The status of the economy. Many of our members have held off purchasing memberships or courses due to the uncertainty in the economy and the rising cost of living."* — Sailing center, Boston
>
> *"Climate change has affected the safety of the CT River and our programs have had to shut down in summer for weeks at a time due to floods, debris and water safety."* — Rowing program, Western Mass

- **Weather and water conditions:** Flooding, debris, and unpredictable river levels (especially on the Connecticut River) have forced multiple business shutdowns.
- **Permitting complexity for waterfront infrastructure:** Multiple respondents describe onerous permitting processes for docks, launches, and waterfront structures.
- **Staffing:** Licensed sailing instructors, USCG-certified skippers, and rowing coaches are in short supply, particularly during peak summer season.
- **Access to water and dockage**: Limited permitted water access points constrain growth.
- **Paddlesports industry headwinds:** Oversaturation nationally has reduced interest in whitewater rafting; kayak rental revenues are declining in some markets.

Tailwinds & Opportunities

- Post-COVID surge in learn-to-sail programs and basic water access experiences.
- Growing corporate and group retreat market for team-building on the water.
- Adaptive sailing programs are expanding and attracting new grant funding.
- Electric propulsion creating new market (Boston Electric Boats' growth from 2 to 6 boats in 4 seasons).
- Dam relicensing negotiations (Deerfield River) have stabilized water release schedules, improving planning for rafting operators.

What Respondents Want from the State

- More accessible permitted water access points and boat launch infrastructure.
- Consistent water release schedules from hydro facilities (CT River model praised).
- Simplified permitting for docks and waterfront structures.
- Public marina for charter boats in Boston.

Outdoor Guiding, Adventure & Experiential Businesses

This diverse segment includes climbing guides, multi-sport outdoor programs, wilderness safety training providers, an archery range, adaptive sports organizations, and nature-based educational operators. Many are mission-driven, blending revenue generation with community access goals.

Image 4. Middle School Rock Climbing Program, Photo Courtesy of Darren Josey

9 respondents offer outdoor guiding, or adventure and experimental opportunities through their business.[4]

Key Business Characteristics

- Often solo or micro-businesses with 1–3 employees.
- High dependence on specialized certifications (AMGA, USA Archery, USCG, WFA, etc.).
- Significant demand from schools, corporate groups, and nonprofits.
- Mission-oriented: many explicitly serve BIPOC, LGBTQ+, or disability communities.
- Online course delivery (e.g., Wilderness First Aid) enabling rapid scaling.

> *"I started [my business] because I saw a clear opportunity to help people in Western Massachusetts connect more deeply with the outdoors. Our region has incredible natural resources but lacked a dedicated, year-round guided adventure company."*
> *– Outdoor Guide*

[4] This segment captures businesses whose primary activity focus is guiding, adventure, or experiential programming and do not fit cleanly into the other defined activity segments. Due to the multi-activity nature of many respondents, overlap is common, and some who offer guiding services may be described within other breakdowns.

Top Challenges

> *"I am currently the only person who's tackling most of the logistical and business-related tasks. I have a teammate who helps events run smoothly, but there is a lot more work to be done in terms of networking, marketing, skill building, etc."* — BIPOC outdoor recreation business, Greater Boston

- **DCR permitting:** The DCR online permitting portal is criticized as too slow, inflexible, and incompatible with how outdoor guide businesses actually operate (clients book days or weeks in advance; permits can't be obtained quickly enough).
- **Access to capital:** For-profit outdoor businesses are often ineligible for state grants that are restricted to nonprofits, even when delivering similar public-benefit services.
- **Insurance for adaptive and specialized activities:** High cost and limited availability of insurance for adaptive water sports, climbing, and high-adventure activities.
- **Scaling capacity:** Solo operators struggle to grow beyond their personal service capacity; finding qualified instructors or coaches is the primary bottleneck.
- **Marketing on a shoestring:** Small operators lack resources for effective marketing and rely heavily on word of mouth and social media.

Tailwinds & Opportunities

> *"I started my business in hopes of helping others and connecting with various wakes of people no matter their race, size, gender, etc. I started this business with the mindset that people will leave having a sense of accomplishment, a sense of belonging, and a sense that they can do hard things. I love rock & ice climbing and I love sharing that experience with anyone who comes climbing with me." – Rock Climbing Guide, Greater Boston*

- Post-COVID surge in demand for guided, human-powered outdoor experiences.
- Online course delivery has dramatically expanded geographic reach (one provider reached 39 countries).
- Corporate wellness and team-building programs are a growing revenue stream.
- MOOR grant programs have been transformative for several respondents (Inclusive Recreation Grants).
- Brand partnerships (Arc'teryx, Patagonia, Fjallraven) showing interest in BIPOC-led outdoor businesses.

What Respondents Want from the State

- Streamlined, flexible DCR permitting for guide businesses.
- Eligibility for state recreation grants extended to qualified for-profit businesses.
- Youth leadership development programs and career pathways in outdoor recreation.
- More public outdoor spaces designed for non-ball-sport activities (archery ranges, climbing areas, etc.) .

Equestrian Businesses, Clubs & Horse-Based Recreation

13 respondents serving horseback riding and equine-based recreation (~9% of all survey participants).

Image 5. Horse Show Hampshire County, Courtesy of MOTT

Respondents include equestrian boarding and training facilities, a working horse ranch offering trail rides and summer camps, a horse rescue offering alternative therapies, a riding club, a horse trainer, and agricultural operations that sell hay to horse owners. Most are family-owned, multi-generational, and located in rural areas.

Key Business Characteristics

- Labor-intensive with highly specialized workforce requirements (horse knowledge is not transferable from other outdoor sectors).
- Significant property and infrastructure costs (stabling, pasture maintenance, trails)
- Strong overlap with agriculture: feed costs, property taxes, and agricultural regulations all affect operations.
- Volunteer-dependent in many cases (clubs, shows, trail maintenance).
- Trail access to state parks and DCR-managed lands is foundational to viability.

Top Challenges

> *"Horse ownership, horseback riding facilities, boarding stables are down dramatically in the last 10 years. It has become too expensive for the average person to own a horse. Riding facilities are almost non-existent. Owners are aging out."* — Horse Stables, Central MA
>
> *"Weather hardships, high labor costs, high insurance costs, working with new horses which takes years of training to be reliable and safe."* — Equestrian Facility, Central MA

- **Aging participant base:** Horseback riding faces declining participation among younger generations; clubs report rising average member age and difficulty attracting youth.

- **Cost of operations:** Rising hay, feed, farrier, and veterinary costs, combined with high property taxes, are making operations financially precarious.
- **Trail access conflicts:** Some state parks are limiting horseback riding access due to user conflicts with hikers and cyclists.
- **Insurance:** High and rising premiums for equestrian activities are a significant cost burden.
- **Workforce:** Horse-knowledgeable staff is extremely scarce; the shared workforce model is largely inapplicable given the specialized skills required.
- **Minimum wage impact**: Hiring young workers for training programs is difficult at current minimum wage levels, particularly for businesses that invest heavily in worker development.

Tailwinds & Opportunities

- State park access expansion has increased the geographic range for guided trail rides
- Alternative therapy and equine-assisted programming is attracting new participants and grant funding.
- Summer camps (horseback riding-focused) continue to fill, particularly for families with equestrian interest.
- Chapter 61A agricultural land tax protection helps some farms remain viable.

> *"The pandemic was good for us with the outdoor appeal. Adding more State park access has increased our ability to offer more guided trail rides."*
> *— Equestrian operation, Western MA*

What Respondents Want from the State

- Protection of multi-use trail access for equestrian users in state parks and DCR lands
- Recognition of equestrian operations as part of the outdoor recreation economy (not just agriculture).
- Grant accessibility for farm-based outdoor recreation businesses
- Advocacy for reasonable minimum wage structures for youth workers in training-intensive environments.

Ski Areas & Snow-Dependent Businesses

A small but economically significant segment. Respondents include multiple ski areas, a ski tuning specialist, ski shop, and snowmobile trail system.

23 respondents offer skiing, snowboarding, or other winter-recreation services, facilities, and/or products (~16% of all survey participants).

Image 6. Wachusett Mountain, Princeton, Photo by Wachusett Mountain, Courtesy of MOTT

These businesses anchor regional winter tourism economies and have significant employment and revenue multiplier effects.

Key Business Characteristics

- Capital-intensive with large fixed cost bases (lifts, snowmaking, terrain maintenance).
- Highly weather-sensitive and increasingly reliant on snowmaking investment.
- Large seasonal workforces with significant housing challenges in rural markets.
- Family-owned operators increasingly squeezed by large corporate chains.

Top Challenges

> *"Weather is always a challenge in the ski industry. Cost of living—what we can pay vs. what employees need to receive is a challenge."* — Ski area operator, Berkshire County

- **Climate variability:** Warmer, shorter winters are the defining long-term threat. Investment in snowmaking mitigates but doesn't eliminate weather dependence.
- **Employee housing:** In rural resort communities, affordable housing for seasonal workers is a critical gap.
- **Cost of living and wages:** Workers need higher wages to afford to live in resort communities, but raising wages compresses already-thin operating margins.
- **Corporate consolidation:** Large resort operators are pricing consumers out of smaller, community-oriented areas—but this may be creating a counter-opportunity.
- **Tariffs:** Ski equipment (skis, snowboards, bindings) is heavily imported; tariff impacts are flowing through to both operators and consumers.

Tailwinds & Opportunities

- Ski resorts have been making long-term investment in IT, lifts, and snowmaking and it is improving competitiveness.
- Strong three winters (2022–2024) provided revenue stability and allowed capital reinvestment.
- A counter-trend: cost-conscious consumers seeking smaller, community-oriented ski areas over mega-resorts.
- Cross-ownership of complementary businesses improves year-round staffing retention.
- Partnership with breweries generated significant event revenue.

What Respondents Want from the State

- Workforce housing support in rural resort communities.
- Recognition of ski areas as anchor employers in rural regional economies.
- Consistent multi-season trail access policies (for snowmobile, snowshoe, and ski trails) that don't segregate user groups.

Summer Camps, Youth Programs & Outdoor Education

This segment includes traditional summer day camps, adventure camps, a children's fishing camp, and providers of youth-focused outdoor education programs.

Image 7. Maria Mitchell Aquarium, Nantucket, Photo by Maria Mitchell Aquarium, Courtesy of MOTT

20 respondents offer summer camp programming, youth outdoor education, and experiential learning (~14% of all survey participants).

They range from large multi-week residential camps to small, specialized programs.

> *"In Massachusetts, there's a strong need for reliable summer programming for working families, but we also saw an opportunity to offer something more than just childcare. We wanted to create a place where kids could build confidence, try new activities, make real friendships, and be surrounded by positive role models."* – *Summer Camp Operator, Greater Boston*

Key Business Characteristics

- Intensely seasonal: revenue concentrated in 8–10 summer weeks, with year-round fixed costs
- Tuition-dependent revenue models are vulnerable to family economic pressure
- High-touch service requiring reliable, mission-aligned staff
- Heavily regulated by state health boards and permitting authorities
- Many serve a mix of market-rate and subsidized or scholarship campers

Top Challenges

> *"The economy impacts parents' ability to afford to send their children to camp. Parents either do not enroll for the whole summer or they reduce the number of weeks."* — Summer day camp operator, *Southeastern MA*

> *"Our biggest challenges are staffing and scheduling—especially finding strong, reliable seasonal staff and making sure we're fully covered during peak weeks."* *– Summer Camp Operator, Greater Boston*

- **Tuition affordability:** Rising operational costs cannot always be passed on to families, particularly for lower-income markets. The gap between what programs cost and what families can pay is widening.
- **Staffing:** Camp counselors and activity specialists are competing with better-paying, easier summer jobs. Mission alignment is essential but hard to incentivize at current wage levels.
- **State regulatory complexity:** "One size fits all" regulations from the state Board of Health are cited as burdensome for small, specialized programs.
- **School calendar conflicts:** School schedule changes (e.g., teacher strikes extending school years) directly reduce camp registration windows.
- **Federal funding uncertainty:** One adaptive recreation nonprofit reported losing approximately 50% of federal funding and is operating at reduced staff.

Tailwinds & Opportunities

- Stable, returning camper enrollment in well-established programs.
- Childcare licensing as a year-round revenue stream (one operator converted a seasonal building to a licensed childcare center).
- Economic Injury Disaster Loans (EIDL) enabled infrastructure upgrades that expanded enrollment capacity post-COVID.
- Online and virtual programming extending reach beyond summer season.
- Adventure camp registrations tracking ahead of prior years for 2026.

What Respondents Want from the State

- Grants or tax credits for for-profit summer day camps (currently excluded from most state funding).
- Reduced property tax burden on seasonal camp properties.
- Flexible, program-appropriate health and safety regulations (not one-size-fits-all).
- Lower minimum wage thresholds for youth workers in structured training programs.

Specialty Retail, Manufacturing & B2B Services

This segment includes outdoor apparel and gear retailers, climbing equipment retailers, a marine specialty insurance agency, an RV roof repair specialist, and an outdoor gear manufacturer (small-scale).

45 respondents offer specialty retail, manufacturing of outdoor gear, or business-to-business services (~31% of all survey participants).

These businesses support the broader outdoor recreation ecosystem but face distinct competitive pressures.

Key Business Characteristics

- Highly competitive with online retail and direct-to-consumer brand sales.
- Community and experiential differentiation is the primary strategic lever.
- Inventory management is increasingly challenging given supply chain volatility.
- B2B services face different challenges than consumer-facing retail.

Top Challenges

> *"There are fewer and fewer brick and mortar outdoor stores in the Greater Boston Area. By 2027 there will only be an REI in Reading, they've closed the Cambridge location in 2025 and will close the Fenway location by the end of 2026."* — Outdoor recreation business, Greater Boston

- **Amazon and DTC competition:** Price matching is impossible; differentiation must come from service, community, and expertise.
- **Tariffs:** Many specialty retailers depend heavily on imported goods; 2025–2026 tariff impacts are flowing through to cost of goods and customer price sensitivity.
- **Consumer spending pressure:** Inflation, political uncertainty, and declining discretionary income are reducing purchasing across most categories.
- **Loss of major anchor retailers:** The contraction of REI in the Boston market removes a source of consumer awareness that benefits the broader specialty retail ecosystem.
- **Real estate:** Commercial rent increases and limited availability of affordable retail space are pressing for small operators.

Tailwinds & Opportunities

> *"I couldn't find a good way to buy climbing shoes in Massachusetts, so I decided to do it myself. The huge growth of climbing gyms in the last decade, and their deprioritizing of retail, helped push me towards opening the store." — Climbing gear retailer, Greater Boston*

> *"I actually started my business out of my own selfish needs, a simple design to save money, turned into a product. One product led to five, and then I began completing my dream of making/selling outdoor gear, although it's slow going, I've sold custom made gear nationwide for the last three years."*
> *- Outdoor gear manufacturer, Central MA*

- Growing climbing gym market is driving demand for technical gear and footwear.
- Loyal local customer bases provide resilience against online competition.
- Repair and service models less vulnerable to DTC competition.
- The Massachusetts e-bike voucher program has been a meaningful demand driver for e-bike retailers.
- Partnerships with local sports clubs (soccer, cycling) generating consistent referral traffic.