MASSACHUSETTS OUTDOOR INDUSTRY PATHWAYS

Needs & Opportunities Report

Summer 2026

Prepared by:
SE GROUP

Acknowledgements

This report was prepared for the Massachusetts Office of Outdoor Recreation.

The Massachusetts Office of Outdoor Recreation (MOOR) seeks to promote Massachusetts as a great place to come play outside! We aim to make Massachusetts one of the most accessible, inclusive, and welcoming states for outdoor recreation. Whether you are visiting or living here, discover all that Massachusetts has to offer.

This report was prepared by SE Group with support from First Seed Sown Sales and Marketing and Collective Insight.

This report would not have been possible without the insights and perspectives of the many outdoor recreation businesses and organizations across Massachusetts. We are deeply grateful to those who took time away from running their businesses and leading their organizations to contribute to this effort.

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Executive Summary

Massachusetts has one of the largest and fastest-growing outdoor recreation economies in the Northeast. In 2024, the industry generated $14.6 billion in economic output, supported more than 107,000 jobs, and ranked first in the nation for outdoor recreation GDP growth for the second consecutive year.

The Commonwealth's outdoor industry includes more than 2,400 businesses spanning marine recreation, fishing, biking, equestrian operations, campgrounds, outfitters, retailers, manufacturers, and service providers. Together, these businesses support local economies, attract visitors, strengthen small businesses, enhance quality of life, and create pathways to health and wellness.

Despite this momentum, outdoor recreation businesses across Massachusetts continue to face shared structural challenges that could limit the industry's long-term growth. While the Commonwealth boasts one of New England's largest outdoor recreation economies, it remains among the region's least coordinated. Businesses, nonprofits, tourism organizations, land managers, and public agencies often operate independently, lacking the shared identity, coordinated support systems, and sustained collaboration that have helped neighboring states strengthen their outdoor recreation sectors and advance common priorities.

To better understand these opportunities and challenges, the Massachusetts Office of Outdoor Recreation (MOOR) launched the Outdoor Industry Pathways Initiative. Drawing on statewide surveys, focus groups, interviews, comparative research, and stakeholder engagement, this report provides a comprehensive assessment of Massachusetts' outdoor recreation industry and identifies pathways for future collaboration and growth.

Needs & Opportunities

- **Marketing & Visibility**
Marketing is the industry's top unmet need, cited by 82% of outdoor businesses. Massachusetts lacks a unified outdoor recreation brand, coordinated promotion, and a centralized way for people to discover outdoor businesses and experiences. Businesses want stronger storytelling, statewide visibility, and resident-focused marketing that drives participation and customer growth.

- **Cost Burden, Operations & Regulations**
Rising costs are squeezing outdoor businesses across the sector. 81% of businesses report being negatively affected by higher expenses, including insurance, wages, tariffs, permitting fees, and taxes. Small businesses often lack the capacity to navigate these challenges alone, creating demand for better regulatory guidance, shared services, and improved access to capital.

- **Workforce Development**
Workforce shortages and labor costs are limiting growth. Seasonal operations, competition for workers, and a lack of clear career pathways make it difficult to recruit and retain talent. Businesses expressed strong interest in shared workforce models, youth-to-career pipelines, and Massachusetts-specific certifications that build skills and professional credibility.

- **Access, Accessibility & Community Connection**
Expanding participation is both an equity opportunity and a business imperative. Transportation barriers, cost of entry, limited accessibility, and a lack of culturally relevant programming prevent many residents from participating in outdoor recreation. Reaching underserved communities can grow the customer base, strengthen the outdoor economy, and create a more inclusive outdoor culture across the Commonwealth.

The Organizational Gap

Across the state, outdoor recreation businesses express clear interest in collaboration and organizing. However, compared to neighboring states, Massachusetts lacks a formal structure, such as a statewide alliance or coalition, to:

- Connect businesses and stakeholders
- Deliver shared services and resources
- Advocate for policy and regulatory reform
- Build a cohesive statewide identity

This gap is especially consequential given that Massachusetts residents are a primary customer base for northern New England's outdoor economy, driving tourism and spending in Vermont, New Hampshire, and Maine while underinvesting in the Commonwealth's own outdoor sector. Without stronger in-state coordination, Massachusetts is less able to capture this demand, compete regionally, access funding, meet sector needs through policy, or fully scale its economic impact.

The Path Forward

In order to help support grow and support the outdoor industry in Massachusetts, the report recommends an approach centered on:

- A recurring Massachusetts Outdoor Recreation Summit supported by MOOR to convene stakeholders, elevate success stories, share knowledge, and strengthen relationships.
- Convene a representative Outdoor Industry Working Group that will serve as a bridge between research and implementation. The Working Group will focus on building a statewide coalition capable of coordinating action across the Commonwealth's outdoor industry.
- Continued coordination among state agencies, regional organizations, businesses, nonprofits, and community partners to advance shared goals.

Stakeholders emphasized that future organizing efforts should be practical, inclusive, and focused on delivering tangible value. These efforts should build upon existing organizations and networks, represent the diversity of Massachusetts communities and regions, and pursue early wins that demonstrate meaningful outcomes for the industry.

Massachusetts has the assets, businesses, and demand to be a national outdoor recreation leader. The next step is building the partnerships and coordination needed to unlock the industry's full potential.

Introduction & Purpose

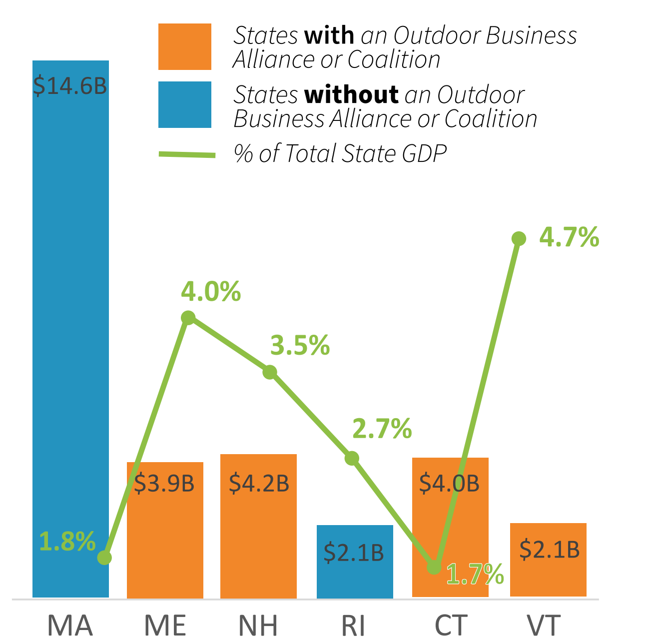
Massachusetts has one of the most dynamic outdoor recreation economies in the Northeast, and one of the least organized. The state is home to over 2,400 outdoor recreation businesses, generates more than $14 billion annually in outdoor recreation-related economic activity, and has seen outdoor recreation value-added grow faster than any other state in the country.

Yet, businesses across the Commonwealth largely operate in isolation, without the connective tissue, shared identity, policy voice, coordinated support, that outdoor industries in neighboring states have had success at building.

The **Massachusetts Outdoor Industry Pathways** initiative was launched by the Massachusetts Office of Outdoor Recreation (MOOR) to begin building that connective tissue. The initiative brings together businesses, nonprofits, and government partners to identify opportunities for collaboration and support, and ultimately, to define what an organized Massachusetts outdoor industry could look like.

This report is the analytical foundation of that effort. It defines the landscape of outdoor recreation businesses in Massachusetts, documents the challenges and opportunities they face, and identifies the roles a statewide organizing entity could play in helping the industry thrive.

Value-Added from Outdoor Recreation by State



Research & Methods

This report synthesizes findings from six distinct research activities conducted between fall 2025 and spring 2026:

Business Inventory: A comprehensive statewide inventory of more than 2,400 outdoor recreation businesses, developed through automated web scraping, manual research, and quality assurance review. Businesses are classified by outdoor activity type and business model.

Regional Listening Sessions: Six virtual and two in-person listening sessions held between November 2025 and January 2026, engaging regional stakeholders across the state. Sessions focused on regional identity, current challenges, and openness to statewide organizing.

Business Survey: An online survey of 147 outdoor recreation businesses conducted in early 2026, covering business conditions, barriers, workforce needs, support priorities, and reactions to potential organizing models. Distributed through inventory contacts, tourism newsletters, chambers of commerce, and MOOR's networks.

BIPOC Focus Groups: Three listening sessions convened outdoor recreation businesses and organizations led by Black, Indigenous, and People of Color (BIPOC), facilitated with support from First Seed Sown Sales and Marketing. Sessions explored connection to the industry, barriers, opportunities, and reactions to organizing models.

One-on-One Business Interviews: Follow-up interviews with businesses who answered the survey to dig deeper into their challenges and opportunities.

State Alliance Research: A review of statewide outdoor business alliances (SOBAs) operating in states across the country, examining organizational structures, membership models, programs, and functions.

How to Read this Report

This report is organized in three parts:

- **Part 1: The Existing Massachusetts Outdoor industry Landscape**
The first part of the report describes the current economic context of the Massachusetts outdoor industry, including who is in the sector, what types of businesses there are, and how they are operating.

- **Part 2: Massachusetts Outdoor Industry Needs and Opportunities**
The second chapter illustrates the needs and opportunities: the barriers businesses face, the needs they express, what other states have done, and what that means for how Massachusetts might organize.

- **Part 3: The Path Forward**
Part 3 outlines the potential next steps for turning the findings into this report into action by describing some initial steps the state should take to support the outdoor industry in Massachusetts.

A Note on Geographic Representation

While this research engaged a broad cross-section of Massachusetts outdoor recreation businesses, it does not represent every voice in the sector. Compared to the rest of the state, there was stronger participation from business owners and industry stakeholders in Western Massachusetts. The findings reflect the perspectives of participants and should not be considered statistically representative of all 2,400+ businesses.

BIPOC Outdoor Business and Organization Perspectives

This report is structured not only to highlight BIPOC outdoor businesses and organizations, but to integrate the perspectives of historically marginalized groups throughout the analysis. Rather than treating these voices as a standalone topic, their experiences and priorities are embedded across all themes and findings.

Environmental Justice populations—including Black, Indigenous, and People of Color (BIPOC) communities and people with disabilities—have long been underrepresented in outdoor recreation, reflecting broader inequities in participation, business ownership, access to capital, and institutional support. As a result, many of the challenges facing BIPOC-owned and BIPOC-led outdoor businesses are both distinct and systemic.

Centering these perspectives is essential to understanding the sector and identifying opportunities for inclusive, equitable growth. Supporting BIPOC-led businesses is not secondary, it is foundational to strengthening the outdoor industry as a whole and reflects MOOR's commitment to a more accessible and representative outdoor recreation sector.

In a state of more than 7.1 million residents, expanding participation and ensuring that outdoor recreation is welcoming, relevant, and accessible to all communities is also critical to growing the overall outdoor recreation market.

Outdoor Recreation Participation Trends and the Adventure Gap

Nationally, outdoor recreation participation continues to reach record levels. According to the Outdoor Industry Association (OIA), **181.1 million Americans—or 58.6% of the population age six and older—participated in outdoor recreation in 2025**, marking the highest participation level ever recorded. Growth was driven by increases across nearly every demographic group, including women, older adults, and communities of color.

This growth is largely driven by newer and more casual participants who engage in outdoor activities less frequently than traditional outdoor enthusiasts. As participation becomes broader, the average number of annual outings per participant has declined. While more people are getting outside, fewer are developing the deep, repeat engagement that has historically sustained outdoor recreation culture, stewardship, and spending.[1]

This distinction is important for Massachusetts. While increasing participation is a positive trend, long-term success depends not only on attracting new users but also on creating pathways that help residents progress from occasional outdoor users to more frequent and committed participants. Historically, "core participants"—those who recreate most often—have been the backbone of the outdoor recreation economy, generating a disproportionate share of equipment purchases, travel spending, memberships, event participation, volunteerism, and conservation support (OIA).

At the same time, participation data continues to reveal significant disparities in who benefits from outdoor recreation opportunities. Although participation among diverse populations has increased in recent years, many historically underserved groups remain underrepresented relative to their share of the population.

This challenge is commonly described as the "**Adventure Gap**," or the unequal access to outdoor recreation experienced by many communities due to historic, economic, cultural, geographic, transportation, and accessibility barriers.[2]

For Massachusetts, the Adventure Gap extends beyond race and ethnicity to include Environmental Justice populations, low-income communities, urban residents, older adults, and people with disabilities. These groups often face barriers such as limited transportation, lack of nearby recreation infrastructure, cost of equipment and programming, concerns about safety and belonging, and infrastructure that does not adequately support accessibility needs. **Research consistently shows that underrepresented populations visit parks, forests, and other outdoor spaces at lower rates than their representation in the broader population would suggest.**[3]

Addressing these disparities represents one of the most significant opportunities for growing both participation and the economic impact of outdoor recreation in Massachusetts. Expanding access, improving accessibility, strengthening community-based programming, and creating welcoming entry points for first-time participants can help convert currently underserved populations into lifelong outdoor recreation users.

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1 *Outdoor Industry Association (OIA). 2025 Outdoor Participation Trends Report.*

2 Brad Rassler. (2026). *"The Adventure Gap and Narratives of Inclusion: James Edward Mills talks about why the face of outdoor adventure must change."*

3 Patricia L. Winter, William D. Crano, Tatiana Basáñez, and Christopher S. Lamb, *"Equity in Access to Outdoor Recreation—Informing a Sustainable Future,"* Sustainability 12, no. 1 (2019): 81, https://doi.org/10.3390/su12010081.

PART 1: THE EXISTING MASSACHUSETTS OUTDOOR INDUSTRY LANDSCAPE

The Economics of Outdoor Recreation

Before examining the businesses that make up Massachusetts' outdoor recreation sector, it is worth establishing the economic context in which they operate. The outdoor recreation economy is a meaningful and growing part of the Commonwealth's broader economic story.

Economic Scale

The Bureau of Economic Analysis (BEA) Outdoor Recreation Satellite Account (ORSA) is an official federal measure of outdoor recreation's contribution to gross domestic product (GDP). It calculates the share of value-added, employment, and compensation attributable to outdoor recreation across all relevant economic sectors, from retail and transportation to arts, entertainment, and accommodation.

$14.6 Billion
Outdoor Recreation Value-Added in MA, 2024

107,987
Jobs Supported by Outdoor Recreation, 2024

1.9%
Share of Massachusetts' GDP, 2024

#1 Nationally in Outdoor Rec GDP Growth, 2023-2024

In 2024, outdoor recreation contributed $14.6 billion to Massachusetts' economy, representing 1.9% of state GDP. The sector supported 107,987 jobs, or 2.8% of total employment in the Commonwealth, generating $7.1 billion in total worker compensation. Massachusetts ranked 18th among all states in outdoor recreation value-added and 17th in outdoor recreation employment.

What makes these numbers particularly notable is the rate of growth. Between 2022 and 2023, outdoor recreation value-added in Massachusetts increased by 13.3%, **the largest year-over-year increase of any state in the country**, and nearly 50% faster than the national growth rate of 9%. In 2023-2024, there is a slowing in the rate of growth throughout the country, but Massachusetts still ranks #1 with a 7% increase in value-added.

Massachusetts has the largest outdoor recreation economy in New England by every absolute measure, including value-added, employment, and total compensation. However, Vermont, Maine, and New Hampshire, while smaller in scale, are more recreation-dependent. Outdoor recreation accounts for 4.6–5.1% of total employment in those states, compared to 2.8% in Massachusetts. Massachusetts also stands apart in its economic volatility; it suffered the deepest pandemic-era contraction in outdoor recreation-related GDP in New England (-30%) but rebounded among the strongest and has posted the highest regional growth rates in both 2023 and 2024, even as the value-added of neighboring states have begun to slow.

The composition of Massachusetts' outdoor economy is also distinct. While snowsports and camping are large drivers of outdoor recreation GDP in Vermont and New Hampshire, Massachusetts leads with multi-use apparel and accessories and boating and fishing. Together, these patterns position Massachusetts as the economic engine of outdoor recreation in New England: large, dynamic, and increasingly outpacing the region even as its neighbors' growth moderates.

What BEA ORSA Measures, and What It Doesn't

The BEA ORSA satellite account measures the direct economic output traceable to outdoor recreation activity. It does not include indirect or induced effects (re-spending, ripple effects into other sectors, secondary job creation). These multiplier effects can be significant in visitor-dependent economies. The $14.6 billion figure is therefore a conservative baseline, not a full economic impact estimate.

Sector Composition

Outdoor recreation GDP in Massachusetts is distributed across nearly every part of the state's economy. In 2024, the largest contributing sectors were:

- **Retail Trade:** ~20% (reflecting consumer spending on gear and equipment)
- **Accommodation & food services**: ~16% (campgrounds, lodging near recreation sites, restaurants)
- **Transportation & Warehousing**: ~14% (travel to and from recreation destinations)
- **Arts, entertainment & recreation:** ~13% (marinas, ski areas, guided experiences)
- **Manufacturing:** ~11% (outdoor apparel and gear production)

Jobs & Compensation

Outdoor recreation generates more than 107,000 jobs in Massachusetts, a workforce comparable in size to the state's entire construction industry. Average compensation for outdoor recreation workers is $65,678.

The outdoor recreation economy is not simply a service or retail economy. It also includes high-wage supporting jobs in logistics, publishing, business services, and finance, creating a platform for career pathways that extend well beyond entry-level or seasonal roles.

The Massachusetts Small Business Context

Understanding the outdoor recreation economy requires understanding the broader Massachusetts small business landscape in which it is embedded. Small businesses, defined as those with fewer than 500 employees, make up 99.5% of all firms in the Commonwealth and employ nearly 1.5 million people, approximately 45% of the state's total workforce[1].

This matters directly for outdoor recreation. The businesses that make outdoor recreation function, including specialty retailers, small-scale gear makers, guides and outfitters, campgrounds and lodging providers, food and beverage establishments near recreation assets, are overwhelmingly small businesses. They operate close to the ground, respond to local demand, and depend on regional ecosystems of customers, partners, and infrastructure that no single business can create on its own.

The Commonwealth's business formation data reflect healthy conditions for continued growth in this sector. Between March 2023 and March 2024, Massachusetts saw nearly 22,386 new establishments open. The sectors most connected to outdoor recreation, arts, entertainment and recreation; retail trade; accommodation and food services, are projected to experience some of the fastest job growth in the state through 2033. The Arts, Entertainment, and Recreation industry alone is projected to grow 15% by 2033, making it the third-fastest-growing industry group in Massachusetts.

1 U.S. Small Business Administration Office of Advocacy (2025). Massachusetts.

Why Organizing Matters for Small Businesses

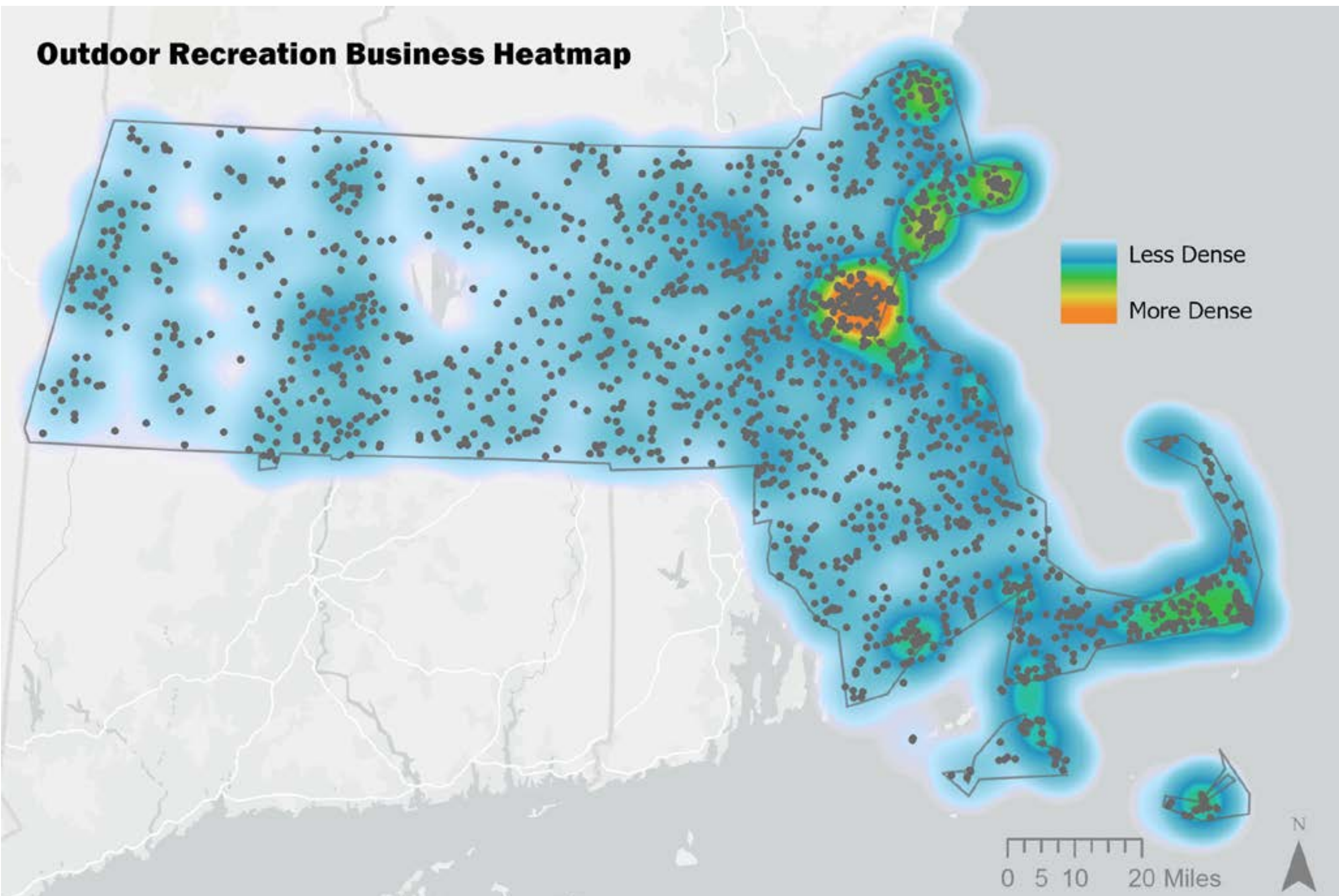
Small businesses are individually nimble but collectively vulnerable. They rarely have the time, resources, or political reach to navigate complex permitting systems, advocate for regulatory change, or invest in the kind of statewide marketing infrastructure that would help them compete with destinations in neighboring states. This is precisely the gap that a statewide organizing entity could fill.

Business Landscape: Inventory Findings

Massachusetts is home to more than 2,400 outdoor recreation businesses spanning a remarkable diversity of activities, business models, and geographies.

The statewide business inventory was developed using a combination of enhanced internet search tools, manual research, and quality assurance to provide the most comprehensive picture of this landscape to date.

The inventory classifies each business along two dimensions: the outdoor activity it is focused on (Outdoor Activity Category) and the core function of the business (Business Category).



A Living Inventory

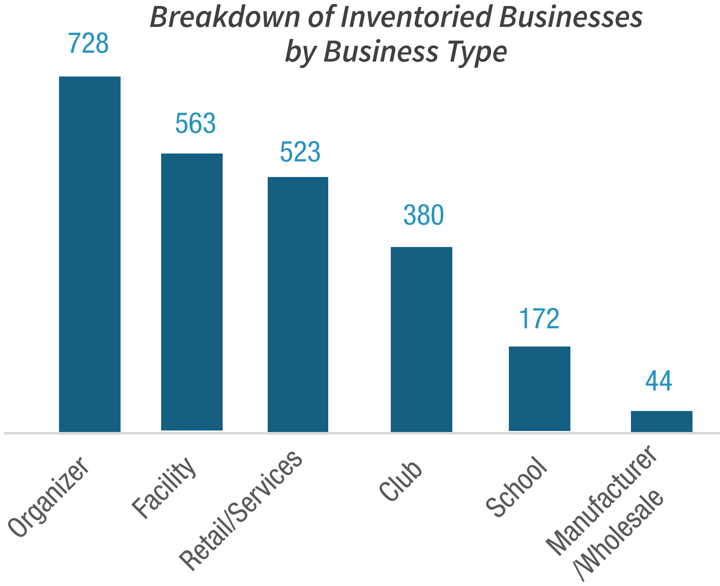
The inventory is designed as a living resource, updated as new or previously missed businesses are identified through ongoing review and outreach. Potential sources of error include businesses that are missing or misclassified due to limited online presence or incorrect online information.

Business-Type Breakdown

When analyzed by primary business function*, Organizers represent the largest category at 728 businesses. This is the largest single business-type category and reflects the central role that facilitated and guided experiences play in Massachusetts' outdoor recreation economy.

Facilities (563) and Retail/Services (523) represent the next largest segments, followed by Clubs (380) and Schools (172). Manufacturer/Wholesale businesses (44) are a small but economically significant segment that is likely undercounted given the challenges of identifying these businesses through online research.

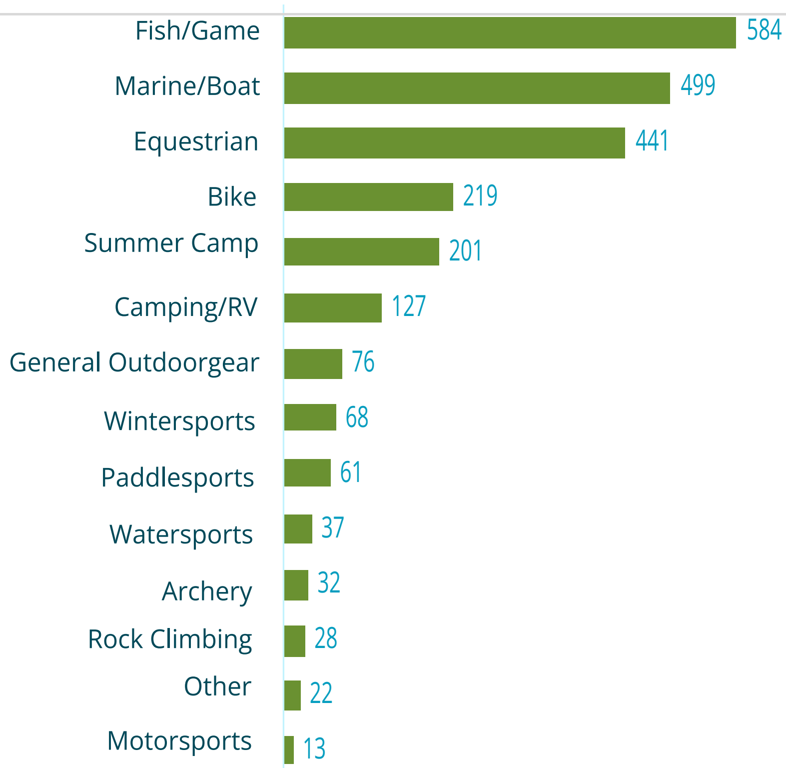
Breakdown of Inventoried Businesses by Business Type



- **Organizer:** Tour providers, guides, charters, and other experiential services.
- **Facility:** Sale of the use of a facility is the primary business (i.e. climbing gyms, campgrounds, ski areas, or horse stables).
- **Retail/Services:** Focused on selling goods and services (i.e. rental/repair).
- **Club:** Sale of a membership is the primary business (could also include the sale of facilities such as shooting ranges).
- **School:** Sale of lessons is the primary business (i.e. horseback riding or sailing lessons).
- **Manufacturer/Wholesale:** Manufacturing and/or wholesale/distributing of goods.

**Businesses often fall into more than one category, but for the purposes of this analysis, businesses were only categorized by their primary business function.*

Breakdown of Inventoried Businesses by Primary Activity Type



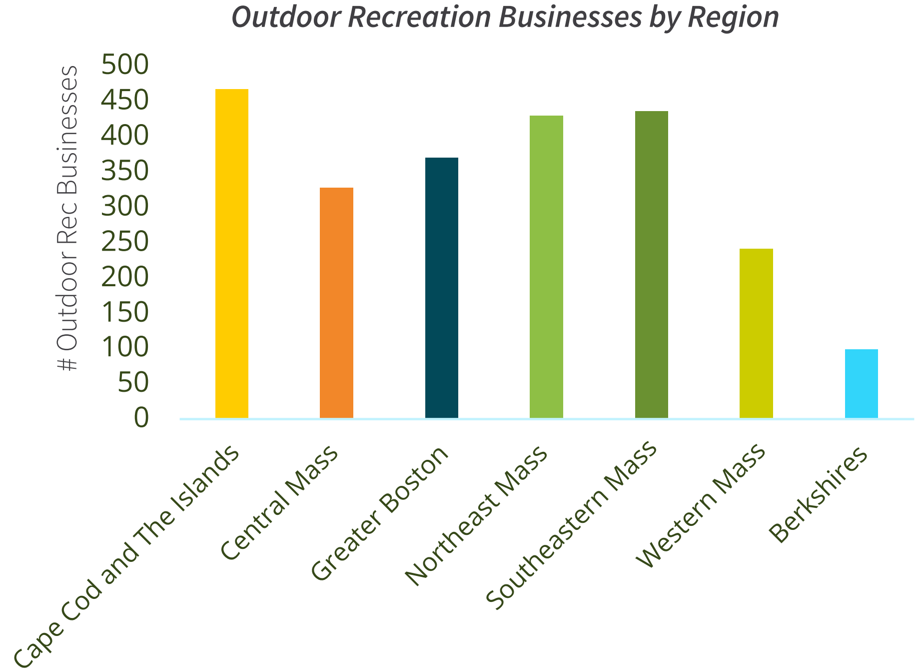
Activity-Type Breakdown

Fish & Game and Marine & Boating businesses represent the two largest segments of the inventory, a reflection of Massachusetts' extensive coastline, rich inland waterways, and strong demand for water-based recreation. Together, they account for more than 1,000 businesses, or roughly 45% of all inventoried businesses.

Equestrian recreation constitutes a third major segment, with 441 businesses distributed across rural and suburban communities throughout the Commonwealth.

Regional Distribution

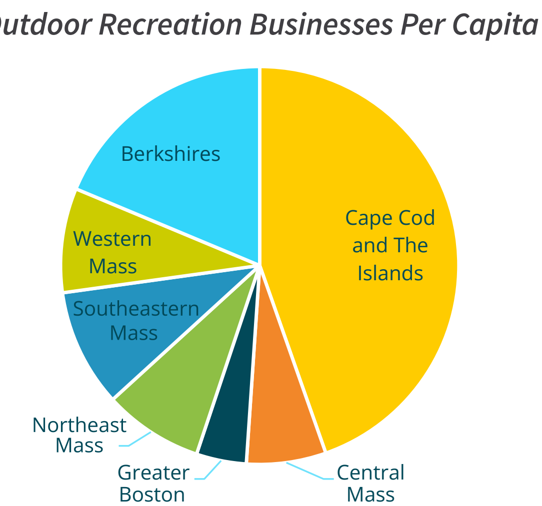
While outdoor recreation businesses are present across the Commonwealth, the inventory reveals meaningful regional variation in both the volume and density of businesses. For this analysis, regional groupings are based on Massachusetts Office of Travel and Tourism designations, with Western Massachusetts split into two distinct areas, the Berkshires and the rest of Western Massachusetts, to better reflect regional differences in business activity.



Notable Clusters

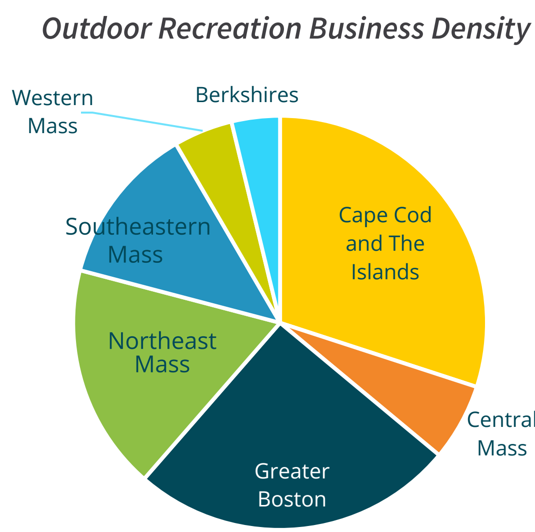
Cape Cod & the Islands

Cape Cod and the Islands lead all regions in both total business count and density when adjusted for population and land area. This reflects the region's tourism-driven economy and heavy emphasis on marine and coastal recreation, boating, fishing, watersports, and guided outdoor experiences. The seasonal surge of visitors supports a diverse range of businesses that might not be viable year-round in other parts of the state.



The Berkshires

The Berkshires stand out with a strong concentration of outdoor recreation businesses relative to the region's population, suggesting a high level of business activity per capita, likely supported by natural assets, a strong outdoor culture, and a steady flow of visitors seeking trail-based, seasonal, and nature-based experiences.



Greater Boston & Northeast Mass

Greater Boston and Northeast Mass show high absolute business counts driven by population density, proximity to infrastructure, and strong local demand for outdoor recreation close to home. The density of businesses in these regions reflects the importance of urban and suburban outdoor access in Massachusetts' overall outdoor industry.

Geographic Gaps & Underserved Areas

The inventory also reveals meaningful gaps in business presence. Notable concentrations of low business density appear around the Quabbin Reservoir and across Central Massachusetts more broadly. While these regions have lower population density and may face access constraints, land use protections, and unique stewardship considerations, they also contain some of the Commonwealth's most significant natural and recreational assets, creating opportunities for nearby communities to capture a greater share of recreation-related economic activity while remaining consistent with conservation goals.

The underrepresentation of businesses in these areas should not be mistaken for a lack of outdoor recreation opportunity. In many cases, it reflects a lack of supporting infrastructure, equipment rentals, lodging, food and beverage, and access points, that would enable businesses to operate viably and visitors to arrive and stay. This distinction between recreational assets and business presence is important for understanding where organizing and investment could have the greatest impact.

Outdoor Recreation Business Trends

The business inventory tells us who is in the sector. The statewide business survey, conducted in early 2026 with 147 outdoor recreation businesses, tells us how they are doing, where they are headed, and what pressures they are navigating. This section draws primarily on survey findings to characterize the current operating environment for Massachusetts outdoor recreation businesses.

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 an uneven recovery and shifting market conditions across outdoor recreation sectors.

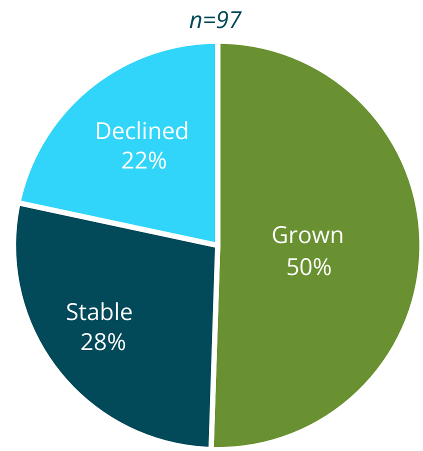
The divergence between recent performance and future outlook is one of the defining features of the current Massachusetts outdoor recreation business landscape. Despite widespread economic headwinds (81% of businesses report that rising costs are negatively impacting their operations), optimism is the predominant orientation. About 60% of businesses plan to expand over the next three years, while just 5% anticipate scaling back.

These conditions suggest that outdoor recreation is an industry that is poised for success but struggling to capture the full benefit of demand due to structural cost pressures and operational barriers.

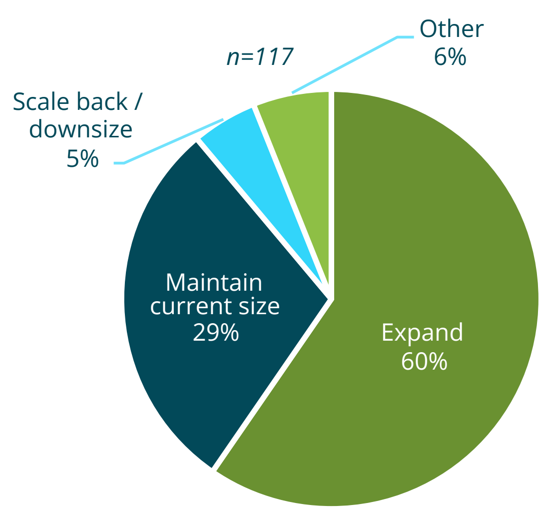
For-Profit versus Non-Profit Inclusion

Unless otherwise noted, percentages in this section reflect for-profit respondents only. Nonprofit responses (24 organizations, representing 19% of respondents) are excluded from business condition analysis but included in organizing pathway discussions. While nonprofits are a vital part of Massachusetts' outdoor recreation ecosystem, their missions, funding models, and operational needs often differ from those of private businesses. As a result, they are considered separately in business condition analyses while remaining an important part of discussions related to regional capacity, partnerships, and organizing pathways.

Survey Respondents Business Development Over Past 3 Years



Survey Respondents Business Plan for the Next 3 Years



Business Tenure & Ownership

The survey respondents skewed toward established businesses. For-profit respondents have been in operation for an average of 29 years, with a median of 21 years, a gap that reflects a small number of very long-established operations pulling the mean upward (the oldest business in the sample has operated for 112 years). Approximately 56% of for-profit respondents are the original founder of their business, and 64% report that the business is their full-time occupation.

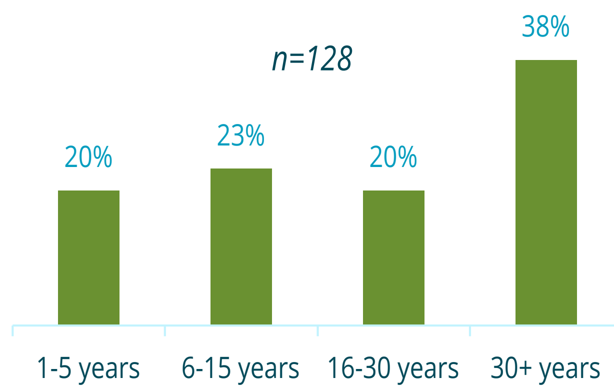
The age profile of businesses in the sample has implications beyond business conditions data, it signals that a significant share of Massachusetts outdoor recreation businesses are entering or approaching the transition zone, where succession planning becomes operationally critical.

Succession Planning

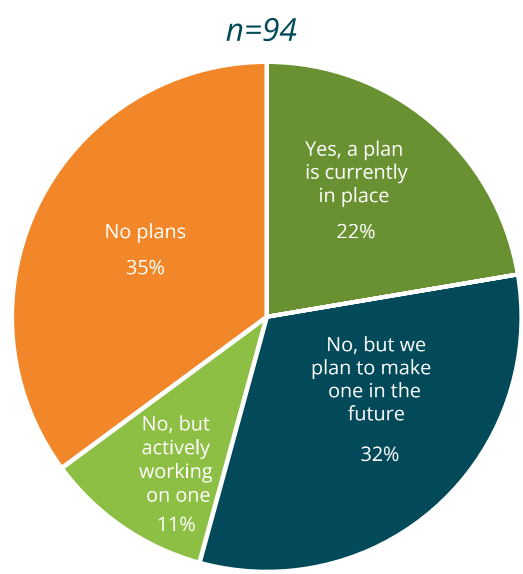
Succession planning is a quiet but significant structural vulnerability across the Massachusetts outdoor recreation sector. Only 22% of for-profit respondents report having a formal succession plan currently in place. Among those without a plan, 32% intend to create one, and 11% are actively developing one, but 35% report having no plan and no intention to create one.

This vulnerability is sharpest in the longest-established businesses. While succession planning increases with business maturity, rising from 0% of businesses open 1–5 years to 47% of those operating for 30 or more years, a notable share 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 50% say they intend to create one eventually and 33% report no plans at all.

Years in Operation



Succession Planning Status of Survey Respondents

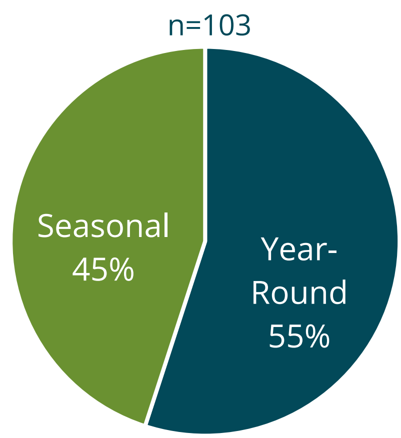


A Sector-Wide Risk

Over 30% of businesses report having no succession plan and no intention to create one. Given that 41% of businesses in the sample have been operating for more than 30 years, this represents a meaningful risk of business closure, workforce disruption, and the loss of established outdoor recreation assets in the years ahead.

Seasonality & Employment

Year-Round versus Seasonal Businesses



The majority (55%) of Massachusetts outdoor recreation businesses operate year-round. However, among the 45% that operate seasonally, summer is nearly universal (93% of seasonal businesses are open in summer), while winter remains a niche operating window (13% of seasonal businesses).

The most prevalent seasonal pattern is spring through fall, with 67% of seasonal respondents active across all three warm-weather seasons. This compression has significant implications for workforce planning, revenue stability, and the timing of policy and marketing support from state agencies and organizing entities.

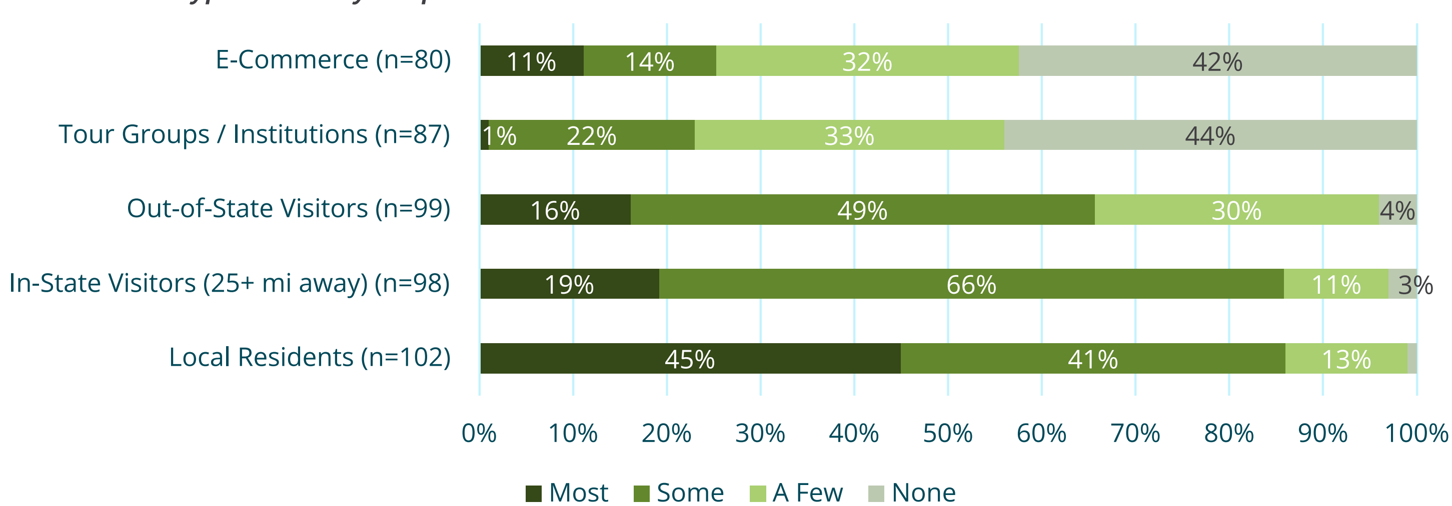
Employment across businesses is highly uneven. A small number of large operators, ski areas, summer camps, marinas, account for a disproportionate share of jobs. While mean employment figures appear high, median values reveal that most businesses operate with very small teams, with typically one to three staff in each employment category.

Customer Base

Outdoor recreation businesses in Massachusetts are grounded in local and regional markets. Nearly half identify local residents as their primary customer base, and most others rely on them significantly as a secondary market. In-state visitors represent the most consistent secondary market, while out-of-state visitors contribute but rarely drive primary demand. Tour groups and e-commerce play a limited role across the sector.

This hyper-local customer orientation has important implications for organizing strategy. Businesses are not primarily competing for national or international visitors— they are serving their neighbors, their communities, and their regional economies. Marketing and visibility efforts that help residents and regional visitors discover local businesses are more immediately valuable than strategies oriented around long-distance tourism.

Customer Type of Survey Respondent Businesses



PART 2: MASSACHUSETTS OUTDOOR INDUSTRY NEEDS & OPPORTUNITIES

Strategic Focus Areas

The engagement and survey process highlighted that Massachusetts outdoor recreation businesses face real and compounding barriers, and they also have a strong sense of what would help address them. The following section organizes the results into four thematic strategic focus areas, each synthesizing findings on barriers, priorities, and opportunities. The challenges discussed are not isolated to any one activity or area of the industry, they are cross-cutting conditions that shape the operating environment for businesses of nearly every type, size, and region.

Marketing and Visibility

- **Marketing and visibility is the universal need across the Massachusetts outdoor recreation sector, identified as the top priority of 82% of for-profit respondents, nearly double any other category. These concerns cut across every activity type, business model, region, and community identity in the sector.**

82%
of outdoor recreation businesses cite marketing & visibility as their top support need

The Barriers

Massachusetts outdoor recreation businesses fly under the radar in many ways. Despite operating in a $14.6 billion sector, most businesses lack the staff, budget, or infrastructure to market themselves effectively. Currently, the state lacks a coordinated outdoor recreation identity that could lift all boats simultaneously.

Neighboring states have been working to solve this problem. Vermont, New Hampshire, and Maine have each built statewide outdoor recreation brands that give individual businesses visibility. Massachusetts has world-class assets, 3,000 miles of coastline, thousands of miles of trails, ski areas, paddling corridors, but no comparable identity that unites the outdoor recreation across the state.

"While Massachusetts has a wealth of year-round outdoor recreation resources, many residents and visitors remain unaware of the breadth of opportunities available across the state. There is still a significant gap in visibility and promotion that affects both participation and tourism. Many people do not know about the opportunities available to them nor the beautiful places they have yet to discover."

– *Massachusetts Outdoor Guide*

This gap is acute for BIPOC-owned businesses and organizations, who described the additional challenge of limited promotional amplification, even within the sector's already-limited marketing infrastructure. BIPOC-led programs often rely entirely on social media presence and individual word-of-mouth, creating a significant visibility gap for organizations that operate with fewer digital resources. As one focus group participant put it, the stronger outdoor brands in New England are from other states, and those businesses are being uplifted by state programs, grants, and promotional support that Massachusetts simply doesn't offer.

What the Industry is Asking For

Businesses want to connect with the right customers at the right time, and they want Massachusetts to present a coherent, compelling outdoor recreation identity that helps them do that.

Specific needs expressed across the research include:

- **Coordinated statewide marketing** infrastructure that aligns outdoor recreation promotion with Massachusetts travel and tourism that businesses across all regions can align with and benefit from.
- **Resident-focused awareness campaigns** that help Massachusetts residents discover local outdoor recreation businesses and opportunities.
- **Content creation and storytelling support**, particularly for businesses that lack the staff or budget to produce high-quality social media, photography, or video content independently.
- **A centralized, well-maintained business directory** with particular attention to surfacing BIPOC-owned and BIPOC-led businesses and organizations as visible, findable participants in the full Massachusetts outdoor industry.
- **Place-based activation and regional identity** campaigns that help each region articulate its distinct outdoor character and draw visitors and residents alike.

> "Increased statewide recognition would help more residents and visitors discover outdoor experiences in Massachusetts and see them as accessible and welcoming."
>
> – *Marine/Boat Business*

The Opportunity

The marketing need represents a natural organizing function for a statewide entity. Unlike policy advocacy or regulatory reform, which require sustained political engagement and are difficult to deliver quickly, a shared marketing infrastructure is something that can be built incrementally and deliver visible early value to businesses. A Massachusetts outdoor recreation identity, a unified directory, and coordinated campaigns around key recreation seasons could each represent early, credibility-building wins for any organizing structure. This infrastructure does not need to replace what regional tourism councils, chambers, and individual businesses are already doing, it needs to connect and amplify those efforts.

The Identity Gap

Survey respondents were asked to rate their agreement with certain statements based on a scale of 0 (strongly disagree) to 10 (strongly agree).

"The success of my business is closely tied to the overall health of Massachusetts's outdoor industry."

Median=7 | Mean=7.2 (n=91)

"My business is closely tied to the economic health of the region where it is located."

Median=9 | Mean=8 (n=92)

"My business is part of Massachusetts' statewide outdoor industry."

Median=10 | Mean=8.2 (n=91)

"My business is closely tied to a specific land feature or outdoor recreation asset."

Median=10 | Mean=8.4 (n=89)

Businesses feel their success is more tied to local economies than to a statewide industry. A statewide approach could bridge this gap by building a Massachusetts outdoor identity grounded in regional strengths. This disconnect is even greater for BIPOC businesses, many of whom do not identify as part of a statewide outdoor industry.

MASSACHUSETTS OUTDOOR INDUSTRY PATHWAYS

Cost Burden, Operations & Regulations

- **Following marketing, a cluster of cost, operational, and regulatory pressures define the day-to-day operating environment for Massachusetts outdoor recreation businesses. These are the barriers that determine whether a business can expand, hold steady, or has to close, and they fall unevenly across the sector, with BIPOC-owned businesses and small operators facing the sharpest burdens.**

81%
of outdoor recreation businesses say rising costs are negatively impacting their operations.

The Barriers

TARIFFS, insurance premiums, wages, property taxes, permitting fees, and commercial rent are all rising faster than revenue across the sector. Four in five businesses report that rising costs are negatively impacting their operations.

Tariffs are an especially acute pressure in 2025–2026, appearing in open-ended responses across cycling (components and frames), fishing (tackle), and ski businesses (equipment), among others. Insurance costs are a particular burden for equestrian operations - with 54% naming it as a top barrier - the highest rate of any segment.

Beyond direct costs, uncertainty is rising. Businesses face not just higher tariffs but volatile trade policy, with frequent executive and court actions creating unpredictability. This makes it harder to plan, set prices, and commit to long-term investments.

ACCESS TO CAPITAL is a barrier for a meaningful share of all respondents, but the disparity between BIPOC and non-BIPOC businesses is stark. Fifty percent of BIPOC survey respondents cited access to financing and grants as a top barrier, compared to just 9% of non-BIPOC respondents. This gap is compounded by the fact that most available state and foundation grants are restricted to nonprofits, leaving mission-driven, for-profit BIPOC businesses without comparable support.

SUCCESSION PLANNING adds a longer-term structural risk. Only 22% of businesses have a formal plan in place, yet 41% of the survey sample has been in operation for more than 30 years. Without targeted support, the sector risks losing established businesses and decades of institutional knowledge as founders age out without successors ready to take over.

REGULATORY BURDEN compounds cost pressure. Businesses identified permitting, insurance, and operational requirements across state and local jurisdictions as recurring challenges. Permit fees, advance booking requirements, limited flexibility for weather-dependent activities, and inconsistent permitting approaches across municipalities and land managers were all cited as barriers. Stakeholders also noted a lack of clear guidance for municipalities on how to permit and manage commercial outdoor recreation activities on local parks, open spaces, and conservation lands, creating uncertainty for both communities and businesses. For some guides and outfitters, these challenges can make operating on public lands financially difficult.

"I'm paying $70 a day for a DCR permit, but the White Mountain National Forest is $150 for the year. For that reason, I'm just gonna drive straight over the border."

–Rock Climbing Guide

REGULATORY AREAS IMPACTING OUTDOOR RECREATION BUSINESSES

Regulatory Area / Process	Primary Agencies	Example Business Activities Affected	Key Opportunities
MA Boating Safety Course	Boat and Recreation Vehicle Registration and Titling Bureau	Charter boats, boat rentals	Consider opportunities to align training requirements with the scale and risk profile of different commercial boating activities, while maintaining safety outcomes and reducing administrative burdens for smaller operators.
DCR Special Use Permitting/ Short & long-term commercial permit	Massachusetts Department of Conservation and Recreation (DCR)	Guided hikes, outdoor education, races, clinics, commercial guiding, festivals	Improve permit clarity, consistency, and timeline predictability, and explore mechanisms that provide greater flexibility for weather-dependent and seasonal recreation businesses.
Trail Construction & Repair Permitting	Massachusetts DEP, local Conservation Commissions	Trail builders, land trusts, bike parks, outfitters, stewardship nonprofits	Streamline review processes for low-impact trail maintenance and repairs, improve consistency across jurisdictions, and provide clearer guidance for recreation-related projects.
Rare Species Habitat Review	Natural Heritage & Endangered Species Program (NHESP)	Trail networks, races, campgrounds, climbing areas, paddling access	Increase predictability by providing clear guidance on allowable improvements, seasonal restrictions, and review timelines for recreation projects within Priority Habitat areas.
Adventure Course & Zip Line Licensing	Massachusetts Department of Public Safety	Aerial adventure parks, ropes courses, zip lines, challenge courses	Explore opportunities to ensure regulatory requirements are appropriately aligned with the operational characteristics and risk profiles of outdoor adventure businesses while maintaining public safety standards.
Campground Permitting & Development	Local Boards of Health, DEP, municipal planning/ zoning boards, DCR	Private campgrounds, glamping operators, RV parks, youth camps	Clarify regulatory pathways and development requirements for campgrounds and related overnight recreation accommodations, particularly for smaller-scale and emerging business models.

"Regulatory uncertainty and changing compliance requirements can create confusion for customers and make it harder to plan ahead season to season."

– *Boat Rental Company*

Key State Partners for Success

In addition to the Massachusetts Office of Outdoor Recreation (MOOR), a number of state agencies and offices play an important role in shaping the outdoor recreation experience, supporting businesses, managing recreation assets, and expanding access to outdoor recreation across the Commonwealth. ***These include, but are not limited to:***

Department of Conservation and Recreation (DCR)

- Manages parks, forests, trails, beaches, and recreation facilities that serve as the foundation of many outdoor recreation experiences.

Department of Fish and Game (DFG)

- Supports conservation, habitat management, outdoor recreation access, and stewardship of natural resources.

Department of Public Health (DPH)

- Advances health, wellness, and quality-of-life outcomes that are closely tied to outdoor recreation participation.

Division of Fisheries and Wildlife (MassWildlife)

- Provides hunting, fishing, wildlife viewing, conservation education, and public land access opportunities.

Division of Marine Fisheries

- Supports recreational fishing, boating, and coastal recreation through stewardship of marine resources.

MassAbility

- Promotes access to recreation, employment, and community participation for people with disabilities.

Mass Cultural Council

- Supports connections between outdoor recreation, arts, culture, heritage tourism, and placemaking.

MassDOT

- Provides transportation infrastructure that connects residents and visitors to outdoor recreation destinations.

Massachusetts Bay Transportation Authority (MBTA)

- Expands transit access to recreation opportunities and destinations across the region.

Massachusetts Department of Environmental Protection (MassDEP)

- Protects the environmental quality of the land, water, and air resources that support outdoor recreation.

Massachusetts Office of Business Development (MOBD)

- Supports business growth, entrepreneurship, investment, and economic development within the outdoor recreation sector.

Massachusetts Office on Disability (MOD)

- Advances accessibility and inclusion to help ensure outdoor recreation opportunities are available to all.

Office of Fishing and Boating Access (OFBA)

- Develops and maintains public access sites for boating, paddling, fishing, and waterfront recreation.

Office of Public Safety and Inspections (OPSI)

- Supports the safe operation of recreation facilities, programs, and outdoor experiences.

Office of Travel and Tourism (MOTT)

- Promotes opportunities and increases visibility for outdoor recreation businesses, experiences, and regions.

What the Industry is Asking For

Specific needs expressed across the research include:

- **Clear permitting and risk-management guidance:** Resources for municipalities and land managers that outline permitting considerations, recreational liability protections, and appropriate insurance standards for outdoor recreation providers.
- **Resource Navigation Assistance**: In addition to the streamlining and reform of state permitting, businesses are looking for more asssitance on navigating the complicated landscape of regulatory resources.
- **Cost-sharing mechanisms:** shared services for purchasing, insurance, and workforce that reduce per-business costs without requiring access to external capital.
- **Succession planning and business continuity support:** targeted assistance around business transition, valuation, and ownership transfer.
- **Expanded capital access:** facilitated connections to financing, including through CDFIs and mission-aligned lenders familiar with outdoor recreation businesses.
- **Grant eligibility reform:** advocacy for expanding state grant programs to reach for-profit businesses, not just nonprofits.

"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."

— Massachusetts Outdoor Guide

The Opportunity

The cost and regulatory pressures facing the sector point to several organizing opportunities with broad relevance. Cost-sharing mechanisms, shared workforce, bulk purchasing, shared insurance, reduce the per-business cost of doing business and are most effective when organized at scale across a sector. A permitting reform initiative that brings the collective voice of 2,400+ businesses to work in collaboration with state agencies has far more leverage than any individual business. Succession planning support addresses a serious structural risk before it affects the industry at large.

Workforce Development

- **Workforce challenges are a significant and growing constraint across the sector. Labor cost and availability are top-ranked barriers, and many businesses express interest in strategies that could stabilize the outdoor recreation workforce, particularly shared workforce models and professional certification pathways. The challenges are not identical across the sector, but they are widespread enough to represent a genuine organizing opportunity.**

29%
of outdoor recreation businesses cite cost of wages as their #1 barrier to business growth.

The Barriers

Wages and benefits are the single most commonly cited growth barrier (29% overall), and the dominant concern for biking (55%), paddling (52%), and summer camp businesses (55%). Massachusetts has a high cost of living, a competitive labor market, and a minimum wage that has risen faster than revenue for many outdoor recreation businesses operating on thin margins.

The challenge is compounded by seasonality. Businesses that can only offer five or six months of work struggle to attract workers who prefer year-round stability, particularly as housing costs in outdoor recreation-adjacent communities have risen sharply.

There is currently no clear, accessible pathway for young people, especially young people from BIPOC communities, who want to pursue careers in the outdoor industry. Specific skills often needed include training like first aid, swiftwater rescue, bike technicians, and boat repair. However, the national certification frameworks that do exist are often cost-prohibitive and not tailored to Massachusetts' specific regulatory environment or recreational landscape.

"If we could get a certification program for guides particular to Massachusetts... it just gives your brand or your business that trust."

-BIPOC Outdoor Guide and Business Owner

What the Industry is Asking For

Workforce needs vary meaningfully across business types, what a small equestrian farm needs is different from what a summer camp or a guided fishing operation needs.

Across the research, three priorities emerge consistently:

- **Shared workforce models** that allow trained workers to move between complementary seasonal employers, enabling more stable year-round employment while giving each business access to skilled staff during peak periods

- **A Massachusetts-specific outdoor guide certification** or professional credential that establishes clear skills standards, builds customer trust, and creates a recognized pathway from outdoor participation into outdoor industry careers

- **Youth engagement programs** with explicit career development pathways: campership and scholarship funding, mentorship, and workforce development that bridges outdoor participation to industry careers and business ownership, with particular attention to communities historically excluded from both.

Case Study: Registered Maine Guides

The Registered Maine Guides program, administered by the Maine Department of Inland Fisheries and Wildlife since 1897, certifies outdoor professionals authorized to lead activities like hunting, fishing, and wilderness recreation. Guides must pass written and oral exams, maintain first aid certification, and complete background checks to ensure safety and expertise.

With roughly 6,300 licensed guides, the program supports tourism while promoting responsible access to Maine's natural resources, complemented by the Maine Professional Guides Association, which upholds professional and ethical standards.

WHAT IS A SHARED WORKFORCE MODEL?

A shared workforce model in the outdoor industry is a collaborative staffing approach where multiple businesses pool talent and coordinate scheduling to meet fluctuating seasonal demand. Instead of competing for the same limited labor pool, employers share access to trained workers who can move between roles, locations, or employers as needs shift throughout the year. For example, an employee might work at a ski resort in winter and transition to a rafting company in the spring and summer. This model helps stabilize employment for workers, extends earning opportunities across seasons, reduces recruitment costs, and improves workforce resilience for employers. Early conversations and actions toward developing a shared workforce model are occurring in Western Massachusetts.

The Opportunity

Survey participants showed strong interest in shared workforce models with 63% of respondents at least somewhat interested, and 30% very interested. This model could address both seasonal staffing gaps and year-round employment stability. Careful program design will be needed to address potential challenges around cultural fit, staff management, skill development, and liability. A regional pilot in one or two sectors with naturally complementary seasonality, ski and paddlesports, for example, could demonstrate proof of concept before scaling.

A Massachusetts-specific outdoor guide certification is one of the highest-potential organizing functions the sector identified, particularly for BIPOC-owned guide businesses that named it as a direct path to the professional credibility needed to grow their operations.

Access, Accessibility & Community Connection

- **Access to outdoor recreation is a business development issue as well as a quality-of-life and health issue. The future participants, workers, and customers that Massachusetts outdoor recreation businesses need most are often the ones least able to reach the places where outdoor recreation happens. Transportation gaps, cost barriers, and the cultural dimensions of access all shape who participates in outdoor recreation, and therefore who outdoor businesses can serve and grow with.**

The Barriers

TRANSPORTATION is one of the most urgent access barriers identified across stakeholders. For example, there is no public transit serving many major outdoor recreation destinations in the Boston metro area. Across the state, multiple businesses and organizations reported having to personally transport participants, rent vehicles at their own expense, or simply lose community members who cannot arrange their own transportation.

Relatedly, access to key recreation sites, particularly coastal and water-based assets, is often constrained by **PARKING**. Multiple stakeholders, including fishing charter operators and kayak guides, identified limited parking, overcrowding, and resident-only restrictions as significant barriers to both participation and business operations. These challenges reflect broader, long-standing coastal access constraints in Massachusetts, where only a limited portion of the shoreline is fully accessible to the public. As a result, demand is concentrated at a small number of access points, contributing to overcrowding and limiting the reach of marine and waterfront businesses.

"Fewer and fewer of our kayaking excursions are taking place in Massachusetts, mainly because of the hurdles involved. For example, access to the ocean. Towns and cities across the board have made parking at boat ramps and such residents only, which therefore cuts it off unless you're a resident of the town. "

– Kayak Guide

Physical access also extends to **ACCESSIBILITY**. While Massachusetts has thousands of miles of trails, only about 1% meet accessibility standards. Efforts such as the state's "Trails for All " initiative are beginning to address this gap, but the limited availability of accessible trail and water access infrastructure continues to restrict outdoor participation for people with disabilities and others with mobility needs.

Barriers (Continued)

COST OF ENTRY compounds the transportation and accessibility barriers, particularly for gear-intensive activities like skiing, climbing, and mountain biking. Group discounts and free access programs exist, but accessing them typically requires relationships, organizational capacity, and advance planning that small and volunteer-run organizations often lack.

Stakeholders also identified fear, unfamiliarity, and **SAFETY** concerns rooted in lived experience as key barriers to access. Many residents, particularly in black and brown communities, may live near parks but have never visited, due to fear, lack of cultural connection, or histories of exclusion and violence at outdoor spaces. Addressing access and accessibility requires deliberate, ongoing efforts that extend well beyond infrastructure: transportation, cultural representation, active outreach, and a genuine sense of belonging are all essential.

What the Industry is Asking For

Specific needs expressed across the research include:

- **Transportation solutions** to outdoor recreation destinations: dedicated shuttle programs, expanded transit options, and carpooling coordination.
- **Advocacy for better parking** and water access for guides and operators who rely on water access for their businesses.
- **Gear lending programs** and subsidized equipment access to reduce the cost-of-entry barrier for new participants, particularly for youth and communities new to outdoor recreation.
- **Awareness campaigns** about public lands and coastal access rights, including what people are entitled to use and how to get there.
- **Community & youth-focused programming** with campership and scholarship funding to create early entry points into outdoor recreation, with an emphasis on programs led by individuals who reflect the communities they serve.
- **Expanded urban green space** and tree canopy investment in under-resourced neighborhoods, so that access to nature doesn't require traveling to distant destinations.

"[The biggest barriers are] cost and lack of knowledge. Lots of people we talk to 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 to ensure your safety. Beyond this, things like mountain biking, skiing, and rock climbing all have high costs. Additionally, people lack the community to go and try something new" – *BIPOC Guide*

The Opportunity

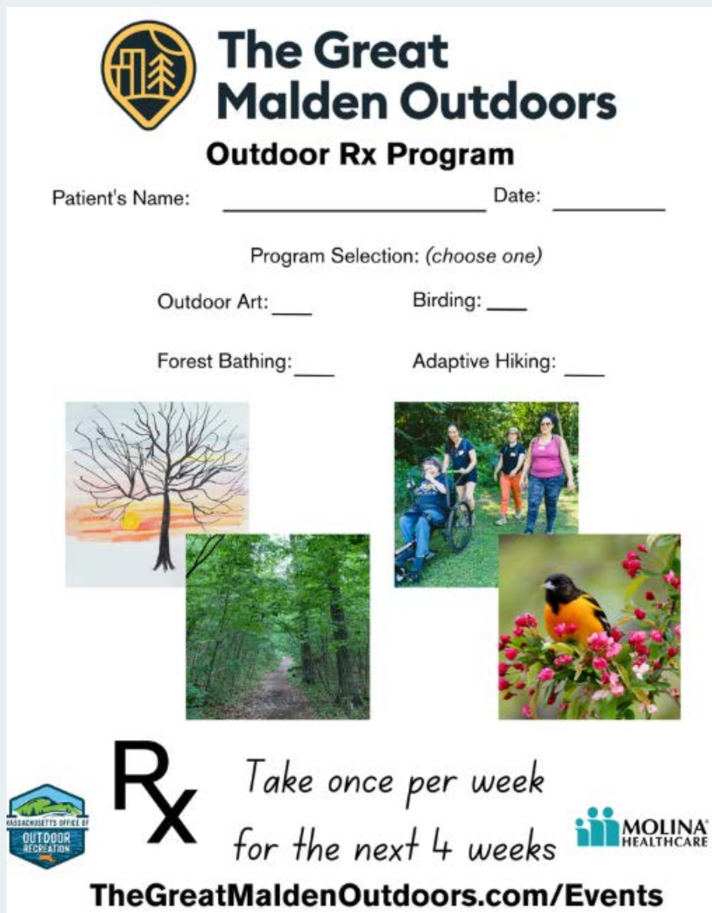
Massachusetts residents are currently a primary customer base for northern New England's outdoor economy, driving tourism and spending in Vermont, New Hampshire, and Maine while underinvesting in the Commonwealth's own outdoor sector. Expanding culturally relevant, accessible in-state outdoor recreation opportunities doesn't just serve equity goals. It captures spending that currently leaves the state, grows the customer base for Massachusetts businesses, and positions the Commonwealth as a national leader in outdoor recreation equity alongside outdoor recreation growth.

Guided experiences and community-based outdoor programs are powerful tools for growing the outdoor recreation market. By introducing new audiences to the outdoors through accessible and culturally relevant experiences, Massachusetts can expand participation rather than compete for existing users. These programs help turn first-time participants into lifelong recreationists while cultivating future leaders, instructors, and ambassadors. As participants gain confidence and share their experiences with others, they create a multiplier effect that increases participation, strengthens outdoor culture, and supports spending on recreation-related goods, services, events, and destinations.

Outdoor Recreation as a Health & Wellbeing Strategy

Massachusetts has been working to advance the connection between outdoor recreation and public health. A growing "Outdoors as Medicine" movement is encouraging healthcare systems, insurers, and public agencies to view time outdoors as a meaningful intervention for improving physical and mental health outcomes while helping reduce long-term healthcare costs. Programs such as Great Malden Outdoors Rx[1] are already demonstrating how partnerships between healthcare providers, funders, public agencies, and outdoor recreation businesses can connect residents with guided outdoor experiences and nature-based programming.

Momentum behind this approach continues to grow. National organizations such as the Outdoor Recreation Roundtable have increasingly positioned outdoor access as a form of health infrastructure,[2] while Massachusetts policymakers are exploring legislation that would expand nature-based health initiatives, such as "Nature as a Prescription," across the Commonwealth.[3]



For outdoor recreation businesses, this represents more than a public health opportunity. By creating formal pathways that introduce new participants to outdoor activities, these programs can expand the customer base for guides, outfitters, retailers, instructors, campgrounds, and recreation destinations while directing new spending into both urban and rural communities. In this way, investments that improve public health outcomes can simultaneously strengthen the outdoor recreation economy and broaden access to the outdoors for populations that have historically faced barriers to participation.

1 *The Great Malden Outdoors*

2 *Outdoor Recreation Roundtable. (2026). Outdoor Recreation Roundtable's Vision for a Healthier America*

3 *Massachusetts General Court, An Act Relative to Nature as a Prescription, S.791, 194th Gen. Ct. (2025–2026), Bill History, Massachusetts Legislature Bill S.791.*

Regional Variation & Unique Needs

The needs and barriers documented in the previous section are cross-cutting, appearing in some form across every region of Massachusetts. But how they manifest, which are most acute, and what opportunities exist varies meaningfully by geography. Regional listening sessions and survey responses segmented by region surfaced both the common ground and the distinctiveness of each region's outdoor recreation identity, business needs, equity dimensions, and organizing potential.

Regional Variation

Massachusetts' outdoor industry varies significantly region-to-region. Statewide approaches to supporting the outdoor industry will be most effective when amplifying and connecting these place-based strengths rather than attempting to replace them with a single unified identity.

During the engagement process, there was a consistent theme across the state: effective organizing must be additive rather than duplicative, building on existing networks and filling genuine gaps rather than creating parallel systems. In every region, expanding local awareness, getting more residents - including residents from communities that have not traditionally participated in outdoor recreation - to discover and use what's nearby, was identified as foundational to the success of the industry.

Note on Regional Survey Data

The business survey is not perfectly geographically representative: the Berkshires/ Western MA is overrepresented (29% of responses vs. 14% of inventoried businesses), while Cape Cod & the Islands (11% vs. 20%) and Southeastern MA (12% vs. 18%) are underrepresented. Regional patterns should be interpreted with this in mind.

Top Barriers to Business Growth by Region

	Western MA/ Berkshires	Central MA	Greater Boston Area	Northeast MA	Southeastern MA	Cape Cod and the Islands
#1	Cost of wages/ benefits	Cost of wages/ benefits	Market uncertainties/ fluctuations	Workforce availability/ seasonal staffing	Permitting/ regulatory complexity	Permitting/ regulatory complexity
#2	Insurance availability/cost	Permitting/ regulatory complexity	Climate impacts/ weather variability	Lack of qualified workforce	Climate impacts/ weather variability	Access to land/ water
#3	Workforce availability/ seasonal staffing	Infrastructure needs	Permitting/ regulatory complexity	Cost of wages/ benefits	Cost of wages/ benefits	Workforce availability/ seasonal staffing

Western Massachusetts & the Berkshires

Western Massachusetts has a well-established outdoor recreation identity. The Western Massachusetts Outdoor Recreation Summit organized by Greenfield Community College and the Western Mass Outdoor Recreation Coalition hosted by MassHire Franklin Hampshire, represent established regional leadership that a statewide organizing effort should build on, not compete with.

Western MA businesses noted feeling underrepresented in Boston-centric statewide conversations, a concern that recurred in survey open-ended responses. The region also has meaningful diversity in its workforce and visitor base that is not always reflected in how outdoor recreation in the region is marketed or who it is seen as serving.

KEY NEEDS:

- Statewide visibility and marketing that actively represents Western MA
- Streamlining of land access
- Shoulder-season development
- Connection to state tourism promotion
- Ensuring that expanded outdoor recreation investment in the region reaches the region's Latino and immigrant communities, particularly in Pittsfield, Holyoke, and Springfield. Ensure outdoor businesses in those communities are visible within the regional ecosystem

OPPORTUNITY:

A statewide organizing entity that visibly partners with and builds on Western MA's existing momentum.

Central Massachusetts

Central Massachusetts has abundant but underrecognized outdoor recreation assets: water-based recreation on lakes, rivers, and reservoirs; an extensive rail trail network; forests and agricultural landscapes. The region is well-positioned to serve as an accessible, four-season destination for Greater Boston day-trippers, but lacks the supporting services infrastructure (e.g., lodging, food and beverage, equipment rental) that would enable it to capture visitor spending.

Central MA has significant communities of color, particularly in Worcester, that are close to outdoor recreation assets but often lack information, cultural connection, or transportation to access them. Resident-focused outreach that is culturally specific and transportation-linked is as important as visitor marketing in this region.

KEY NEEDS:

- Coordinated regional storytelling and branding
- Supporting services infrastructure near key recreation sites
- Transportation connections from Worcester and other population centers to recreation assets
- Outreach to Worcester's diverse communities and investment in accessible recreation infrastructure near population centers, not just at destination sites

OPPORTUNITY:

Positioning Central MA as the accessible outdoor recreation option for a large, proximate, diverse Greater Boston market.

Northeast Massachusetts

Northeast Massachusetts combines coastal and riverfront recreation assets with equestrian experiences, climbing, and strong trail infrastructure. Proximity to Greater Boston's population creates strong demand for short-duration outdoor experiences, and an opportunity to reach residents who are close to outdoor recreation but don't know it's there.

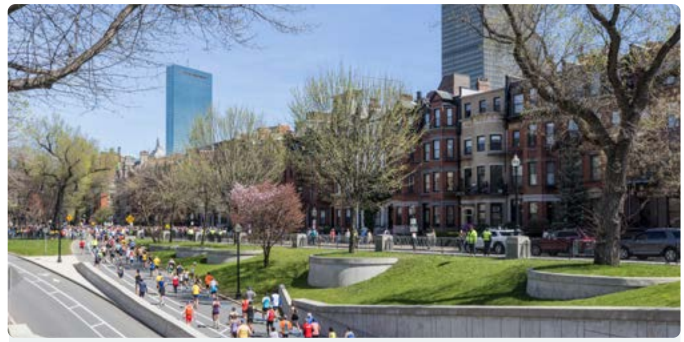
Regional listening session participants emphasized the need to expand awareness and invite in residents who do not currently recreate outdoors, with particular emphasis on inclusivity and reaching new and diverse user groups through municipal partnerships and community-based outreach.

KEY NEEDS:

- Resident awareness campaigns
- Municipal partnerships for outreach to diverse user groups and stronger connections between community recreation, regional trails, and local businesses
- Disability access and adaptive recreation were surfaced as specific gaps in this region. Expanding accessible trails, equipment, and guided experiences serves both equity goals and a growing market

OPPORTUNITY:

The region's proximity to Greater Boston's diverse population makes it a natural testing ground for urban-to-outdoor access programs.



Greater Boston Area

Greater Boston is Massachusetts' most populous region and a major hub for outdoor recreation businesses. The region's stakeholders place strong emphasis on equity, access, and expanding participation among historically excluded communities.

Youth engagement emerged as a critical priority, with stakeholders highlighting the need for clear pathways from outdoor experiences to careers and business ownership, supported by programs like camperships, mentorship, and workforce development.

Transportation remains a key barrier. Despite robust transit systems, most outdoor destinations are still car-dependent, limiting access, especially for BIPOC communities and urban residents.

KEY NEEDS:

- Equity-centered access programming
- Transportation solutions to regional recreation destinations
- Youth engagement and workforce development pipelines
- Resident education about nearby opportunities

OPPORTUNITY:

Greater Boston's philanthropic, corporate, and institutional resources could be mobilized by a statewide organizing entity in support of outdoor recreation equity initiatives to create more visibility.

Southeastern Massachusetts

Southeastern Massachusetts is defined by working waterfronts, maritime communities, coastal recreation, agritourism, and suburban towns. The region has struggled with a pass-through identity, with visitors moving between Boston and Cape Cod without stopping.

The region's working waterfront economy includes a significant Portuguese-speaking community in New Bedford and surrounding towns, a cultural connection to marine recreation and fishing heritage that is rarely reflected in how the region's outdoor industry is marketed or who it sees as its audience.

KEY NEEDS:

- Cohesive regional storytelling and branding
- Centralized visitor information
- Promotion of the region's maritime and agricultural outdoor recreation identity
- Marketing and programming that reflects the cultural heritage and community identity of Southeastern MA's diverse coastal communities, including Portuguese, Cape Verdean, and immigrant fishing communities

OPPORTUNITY:

Working waterfront and agricultural landscapes offer differentiated outdoor recreation products, fishing heritage experiences, agritourism, equestrian experiences, with cultural differentiators.

Cape Cod & the Islands

Cape Cod and the Islands lead all regions in outdoor business density and represent the most tourism-dependent outdoor recreation economy in the Commonwealth. Marine and coastal recreation dominate the business landscape. The visitor demand surges in summer and collapses in winter, creating sharp challenges for workforce retention, year-round viability, and infrastructure management.

The Cape includes both year-round and seasonal immigrant and communities of color, who are often underrepresented in tourism and outdoor industry narratives and navigate complex relationships with recreation and the local economy. Conservation groups and land trusts are central to maintaining access to outdoor recreation, but balancing conservation, community needs, and visitor demand remains a defining regional challenge.

KEY NEEDS:

- Shoulder-season development
- Workforce housing and year-round employment solutions
- Balance between conservation, community access, and visitor management
- Ensuring that year-round Cape communities have affordable access to the same outdoor assets that make the Cape a visitor destination

OPPORTUNITY:

The Cape's national profile, visitor volume and seasonality make it a central hub of outdoor recreation. However, there are opportunities to support year-round outdoor recreation sustainability that benefits both residents and visitors.

Key Takeaways

- **Throughout the research process, businesses and stakeholders identified several consistent opportunities where state agencies, partners, and future coordinating efforts could play a meaningful role in strengthening Massachusetts' outdoor industry.**

Marketing & Visibility

Key Takeaways

- Marketing and visibility represent the largest unmet need identified by outdoor recreation businesses in Massachusetts.
- Despite operating within one of the nation's fastest-growing outdoor recreation economies, Massachusetts outdoor recreation businesses lack a unified statewide outdoor recreation identity that businesses can align with and benefit from.
- Coordinated statewide promotion, storytelling, and business visibility efforts could help Massachusetts outdoor recreation businesses attract customers, strengthen brand recognition, and compete effectively across markets.

Cost Burden, Operations & Regulations

Key Takeaways

- Rising operating costs are affecting outdoor recreation businesses across Massachusetts and are limiting growth, investment, and expansion opportunities.
- Massachusetts outdoor recreation businesses interact with multiple regulatory and permitting systems and frequently identified navigation, coordination, and lack of predictability as ongoing challenges.
- Improved regulatory navigation support, business assistance, and cross-agency coordination could help outdoor recreation businesses reduce costs and barriers while maintaining important public safety, stewardship, and resource management goals.

Workforce Development

Key Takeaways

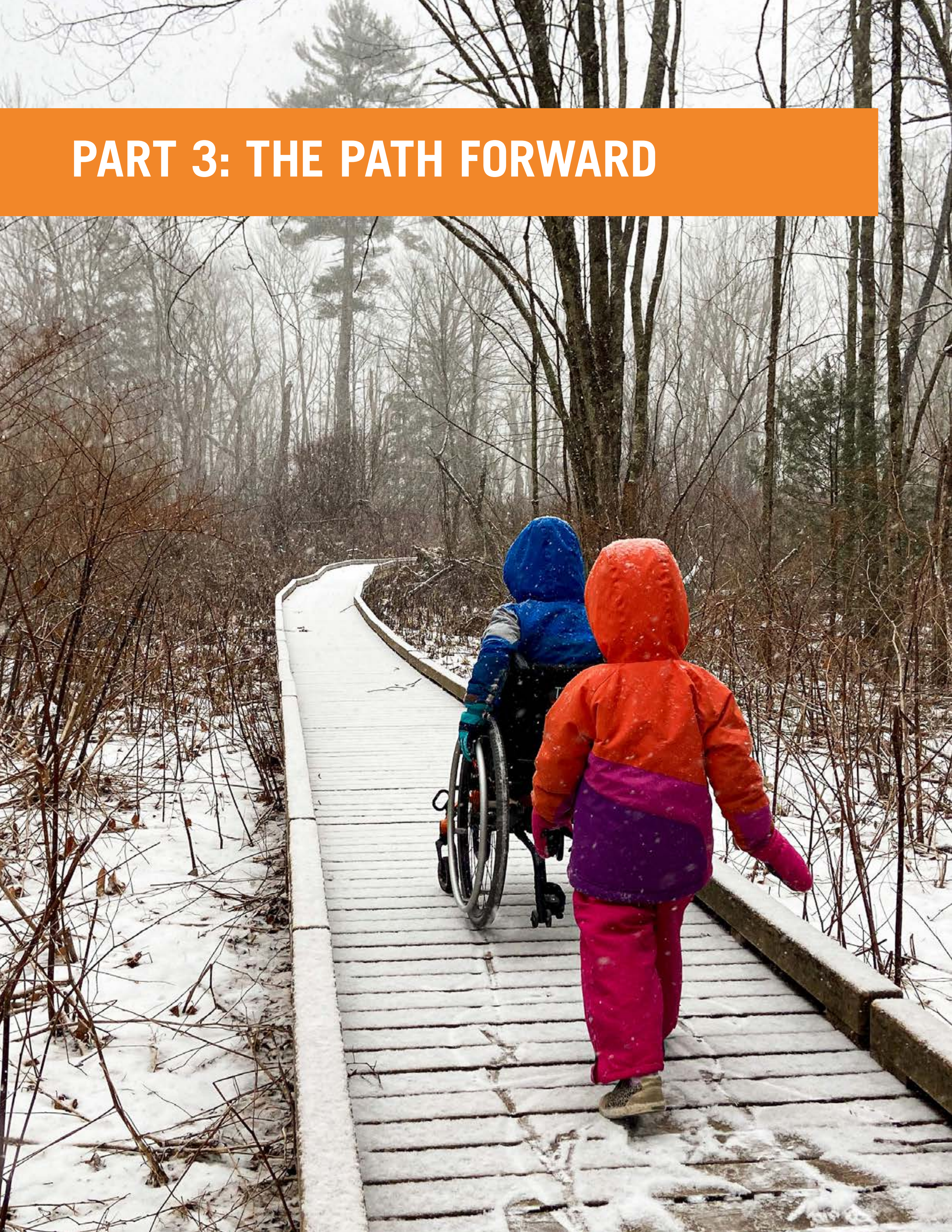
- Workforce availability, recruitment, retention, and labor costs are significant challenges for outdoor recreation businesses across Massachusetts.
- Massachusetts outdoor recreation businesses expressed strong interest in collaborative workforce solutions, including shared workforce models and professional certification or credentialing programs.
- Expanded early-career pathways could help outdoor recreation businesses develop talent, address industry skill gaps, and support long-term employment within Massachusetts' outdoor industry.

Access, Accessibility & Community Connection

Key Takeaways

- Transportation limitations and the cost of participation remain significant barriers that limit access to outdoor recreation experiences and customers for outdoor recreation businesses.
- Accessible trails, facilities, and infrastructure are essential for connecting people of all abilities with Massachusetts' outdoor recreation opportunities and businesses.
- Expanding participation in outdoor recreation can support equity goals while helping outdoor recreation businesses grow their customer base and strengthen demand for recreation experiences and services
- Community-based, culturally relevant, and accessible programming can help outdoor recreation businesses and community partners connect new audiences to outdoor recreation while supporting long-term industry growth.

PART 3: THE PATH FORWARD



Organizing Pathways

The research conducted for this initiative points less toward creating a single new organization and more toward establishing a coordinated process for bringing stakeholders together around shared goals. Businesses, nonprofits, tourism organizations, public agencies, land managers, and community organizations consistently expressed interest in greater collaboration, but emphasized that any future effort must build upon existing networks rather than duplicate them.

To explore potential approaches, stakeholders were asked to react to three organizing pathways.

- **Massachusetts Outdoor Recreation Summit:** A recurring statewide gathering focused on connection, knowledge sharing, visibility, and identifying shared priorities across the outdoor recreation sector.

- **Massachusetts Outdoor Recreation Coalition:** A broad cross-sector network of businesses, nonprofits, tourism organizations, community groups, land managers, and public agencies working together to advance shared priorities and coordinate action.

- **Massachusetts Outdoor Recreation Business Alliance:** A business-focused membership organization primarily dedicated to supporting for-profit outdoor recreation businesses through services, networking, advocacy, and business development

While each approach received support, a consistent theme emerged throughout the research: stakeholders favored a broad, collaborative model that brings together the full outdoor recreation ecosystem rather than a standalone business-only organization.

A recurring statewide summit and a coalition-building process were viewed as the most complementary approaches. The summit provides a platform for connection, visibility, and shared learning, while a coalition can sustain momentum, coordinate action, and address challenges that extend beyond any single event.

"A combination works best. A recurring Summit builds connection and visibility, but the biggest impact will come from a Coalition that can maintain momentum year-round and represent the sector on practical issues like permitting, regulations, workforce, and infrastructure. Outdoor recreation businesses are often seasonal and resource constrained, so any structure should be lightweight to participate in, with clear value for members."

- Boat Rental Company

Feedback on Organizing Approaches

Statewide Summit

Stakeholders consistently viewed a statewide outdoor recreation summit as one of the most achievable near-term actions. Participants saw value in creating a recurring opportunity for sectors that do not regularly interact to come together, build relationships, share information, and identify common priorities.

Many participants envisioned a summit that extends beyond a traditional conference format, combining networking, educational sessions, outdoor experiences, business showcases, and community-focused programming. Several stakeholders also highlighted opportunities to elevate underrepresented voices through components such as a BIPOC Outdoor Expo or similar community-facing experiences.

Importantly, participants generally viewed the summit as a convening and relationship-building tool rather than a solution to the industry's challenges on its own. Many felt that the Massachusetts Office of Outdoor Recreation (MOOR) is well-positioned to coordinate the logistics, administration, and facilitation of a recurring statewide summit.

Outdoor Recreation Coalition

Among the organizing approaches discussed, stakeholders expressed the strongest support for a coalition-oriented model. Participants consistently noted that many of the industry's most pressing challenges—including marketing, workforce development, access, and regulatory issues—cannot be addressed through a single event or by individual organizations acting alone.

Stakeholders consistently favored a structure that:

- Connects businesses, nonprofits, tourism organizations, land managers, and public agencies
- Coordinates efforts across regions and sectors
- Provides a forum for ongoing collaboration
- Helps advance shared priorities and initiatives
- Builds upon existing organizations and networks rather than creating competing structures

Many participants described the coalition not as a new organization, but as an ongoing collaborative effort that helps align stakeholders around common goals. Several stakeholders also emphasized that coalition-building should begin with a representative Working Group that can help identify priorities, guide implementation, and determine the most appropriate long-term structure for Massachusetts.

While the summit was viewed as a mechanism for convening stakeholders, the coalition was viewed as the mechanism for sustaining momentum and advancing action throughout the year.

Why a Business Alliance Is Not the Recommended Starting Point

Stakeholders acknowledged that many services commonly associated with outdoor business alliances—including networking, technical assistance, workforce development, business support, and workshops—would be valuable additions to Massachusetts' outdoor recreation ecosystem.

However, support for a standalone business-only alliance was more limited. Participants raised concerns about duplication with existing chambers of commerce, tourism organizations, and business networks. Instead, many felt that these functions could be delivered more effectively through a broader coalition structure that includes businesses alongside nonprofits, tourism organizations, community partners, and public agencies.

The findings suggest that Massachusetts should focus first on building a broad-based coalition and testing collaborative initiatives before determining whether a separate business alliance is needed in the future.

Comparative Context: Lessons from Other States

- **Massachusetts is not the first state to explore how to organize its outdoor recreation sector. State outdoor business alliances (SOBAs) have emerged across the country as models for connecting businesses, amplifying the industry's voice, and creating support structures that individual businesses cannot build alone. Reviewing what other states have built offers a useful lens for understanding what Massachusetts might need, and what it might do differently.**

The SOBA Landscape

There are more than 20 different state outdoor recreation business alliances or broader coalitions, with some states, like North Carolina, having multiple groups supporting outdoor recreation businesses and advocacy around outdoor recreation.

State outdoor business alliances take a range of organizational forms, each with distinct tradeoffs. The most common model is the independent nonprofit, operating as a 501(c)(6) or 501(c)(3), seen in states like California, Maine, Vermont, and Pennsylvania. This structure offers the greatest flexibility: organizations can build membership programs, pursue a broad fundraising base, take political positions, and sustain operations without depending fully on government support or priorities

Core Functions Across States

- **Advocacy & Policy:** Nearly every SOBA emphasizes advocacy for outdoor recreation policy, funding, access, and land stewardship
- **Economic Development:** Many alliances frame outdoor recreation as an economic driver, promoting job creation and rural development
- **Business Support:** Technical assistance, workforce development, and mentorship programs are central in states like Maine, Vermont, Utah, and North Carolina
- **Signature Events:** Conferences, expos, and summits drive visibility, connection, and annual momentum
- **Education & Research:** Economic impact reports and legislative education establish the industry's credibility with policymakers

What Is Universal vs. What Is Distinctive to Massachusetts

Some challenges appear across virtually every state's SOBA experience:

- The tension between small, resource-constrained businesses and the time and cost of participation in an organizing structure
- The risk of building a structure that produces events and conversation but fails to deliver tangible policy or operational wins
- The importance of early, visible wins in establishing trust and sustaining engagement

Massachusetts also faces challenges and opportunities that are more distinctive:

- A large, diverse urban population with real demand for accessible outdoor recreation creates a chance for Massachusetts to lead nationally on outdoor recreation equity, not just growth.
- Massachusetts is not a state where most residents immediately think of outdoor recreation, despite the sector's $14.6 billion contribution, making the case for organizing investment harder than in states with established outdoor brands.
- A crowded landscape of local, regional, and statewide agencies and non-profits that are already connecting with their members and stakeholders.

What Nearby States Are Doing

Maine Outdoor Brands (MOB)

Founded: 2017

Structure: Independent, member-driven non-profit; partners with Maine Office of Outdoor Recreation

Mission: "Unite and provide a voice for Maine's outdoor product, service, and retail companies"

Key Offerings: 3-day Outdoor Economy Summit; joint marketing and trade show efforts; holiday gift guide; job board; workforce partnerships; networking events; Trailblazer Awards

Membership: Application-based, dues required; primarily for-profit outdoor companies

Notes: Supports Maine's $3B outdoor economy; strong state partnership; L.L. Bean as anchor brand; includes programs for underrepresented communities

Vermont Outdoor Business Alliance (VOBA)

Founded: 2018

Structure: Independent nonprofit (501c3); works alongside state agency VOREC

Mission: "VOBA educates Vermonters on outdoor recreation and educates businesses on business development, collaboration initiatives, and outdoor recreation policy."

Key Offerings: Outdoor Economy Summit; business technical assistance; workforce programs; branding; $5K climate resilience grants; equity toolkit

Membership: ~135 members; primarily for-profit outdoor businesses across sectors

Notes: Strong state alignment; access to grants and planning; 2025–2030 plan emphasizes climate resilience, innovation, and career pathways

Granite Outdoor Alliance (New Hampshire)

Founded: 2020

Structure: Independent nonprofit; partners with NH Office of Outdoor industry Development (ORID)

Mission: "Advance NH's outdoor industry toward a sustainable and responsible future by uniting businesses and communities around land conservation, economic development, education, and health & wellness"

Key Offerings: NH Outdoor Industry Day event; industry networking and community building; policy advocacy; industry resource and guidance development

Membership: 200+ members; open to businesses, nonprofits, and professionals; dues from $30

Notes: Private-sector oriented; "Grounded Growth" initiative; active in state and federal policy

Outdoor Business Alliance of Pennsylvania

Founded: 2025

Structure: Launched with $50K state funding + $200K from Richard King Mellon Foundation; operates as independent nonprofit with strong state government partnership

Mission: "Elevate the needs of PA's outdoor industry and support business development, innovation, and growth across the state's $19B outdoor economy"

Key Offerings: Outdoor Economy Summit & Expo; technical assistance and workshops

Membership: Early-stage; broad stakeholder network built through Elevate Outdoors PA engagement process; no membership fees

Notes: Newest alliance; priorities: small business growth, workforce, capital access, collaboration

Next Steps

The Massachusetts Outdoor Industry Pathways initiative confirmed that outdoor recreation is a significant and growing part of the Commonwealth's economy. However, outdoor recreation businesses continue to share common challenges related to visibility, workforce, operating costs, and participation. Industry stakeholders expressed strong interest in coordinated efforts to tackle these challenges, while emphasizing that future efforts should be practical, inclusive, and focused on delivering tangible value.

Rather than creating a new organization immediately, stakeholders favored an approach focused on bringing partners together to identify shared priorities, strengthen collaboration, and advance collective action. The findings point to three complementary elements: a MOOR-led statewide summit, a stakeholder-led Working Group focused on coalition building, and active participation from state agencies and partner organizations.

A Statewide Summit Led by MOOR

A statewide outdoor recreation summit was consistently identified as the most achievable near-term action. Organized and coordinated by the Massachusetts Office of Outdoor Recreation (MOOR), the summit will provide a recurring opportunity for businesses, nonprofits, tourism organizations, land managers, community organizations, and public agencies to come together around shared interests and priorities.

Importantly, the summit functions as a convening mechanism. It creates space for collaboration, learning, and relationship-building, but is not intended to be the primary vehicle for implementing long-term initiatives.

A Working Group Focused on Coalition Building

As a next step, MOOR will convene a statewide Working Group in Fall 2026 representing businesses, nonprofits, tourism organizations, land managers, community organizations, and government partners. The Working Group will serve as the bridge between research and implementation, helping translate the findings of this report into actionable priorities and recommendations.

The Working Group's primary focus will be building a statewide coalition capable of coordinating action across the outdoor recreation ecosystem.

Rather than creating a new organization immediately, the group will identify opportunities for collaboration, develop consensus around priorities, and determine what type of long-term coordinating structure is most appropriate for Massachusetts. Outcomes will include the development of 1-year, 3-year, and 5-year goals, actions, and leadership roles.

State Agency Partnership Will Be Essential

While MOOR can convene a statewide summit and a Working Group can advance coalition-building efforts, many of the needs identified through this research will require active participation from a broader range of state agencies and partners. Workforce development, tourism promotion, transportation, accessibility, economic development, permitting, and business assistance all extend beyond the authority or capacity of any single organization.

Stakeholders consistently identified opportunities for stronger coordination among agencies whose work intersects with outdoor recreation. Just as businesses and organizations benefit from greater collaboration, outdoor recreation outcomes can be strengthened when agencies align efforts, share information, and identify areas of mutual interest.

Roles in Advancing Industry Needs

The findings of this report suggest that strengthening Massachusetts' outdoor recreation sector will require action from multiple partners. Some needs are best addressed through a statewide summit coordinated by MOOR, while others require ongoing collaboration through a coalition-building process or support from state agencies and partner organizations. The table below illustrates how different entities can contribute to addressing the industry's most frequently identified needs.

Marketing & Visibility

- **Summit:** Share success stories, showcase businesses and destinations, build awareness of outdoor recreation opportunities across the Commonwealth.
- **Coalition:** Coordinate a statewide outdoor recreation identity, support a business directory, identify marketing priorities, and elevate regional stories.
- **State Agencies:** Support coordinated promotion through tourism and economic development programs; integrate outdoor recreation into statewide marketing and destination development efforts.

Workforce Development

- **Summit:** Connect employers, educators, workforce partners, and outdoor organizations; showcase workforce programs and success stories.
- **Coalition:** Advance shared workforce pilots, identify workforce needs, support professional development and credentialing initiatives.
- **State Agencies:** Explore workforce development funding, career pathway programs, certifications, internships, apprenticeships, and partnerships with educational institutions.

Cost Burden, Operations & Regulations

- **Summit:** Surface recurring challenges, facilitate dialogue, and educate stakeholders about existing programs and resources.
- **Coalition:** Identify common regulatory barriers, coordinate feedback, and engage state agencies and legislators around shared solutions.
- **State Agencies:** Improve cross-agency coordination, provide clear guidance and navigation resources, and evaluate opportunities to streamline administrative processes where appropriate.

Access, Accessibility & Community Connection

- **Summit**: Highlight successful programs, partnerships, and community-led initiatives; convene diverse stakeholders around participation goals.
- **Coalition:** Build partnerships, identify barriers to participation, and advance collaborative projects that expand access and community engagement.
- **State Agencies**: Support accessibility improvements, transportation solutions, inclusive programming, and investments that connect more residents to outdoor recreation opportunities. Study outdoor recreation participation by demographics to measure effectiveness of programming.

Equity as a Guiding Principle

The findings from the BIPOC focus groups suggest that equity should not be treated as a separate program area, but instead should be incorporated into how any future organizing effort is designed and governed. Participants consistently emphasized the importance of building structures that are inclusive from the outset and reflective of the full diversity of Massachusetts' outdoor recreation ecosystem.

This includes:

- Representation from diverse communities within leadership and decision-making structures
- Increased visibility for BIPOC-owned and BIPOC-led businesses and organizations
- Peer networks, mentorship opportunities, and relationship-building
- Accessible workforce and leadership development opportunities
- Intentional outreach to historically underserved communities
- Community-facing programming and events that create meaningful opportunities for participation

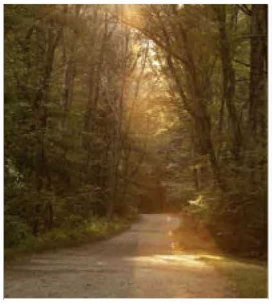
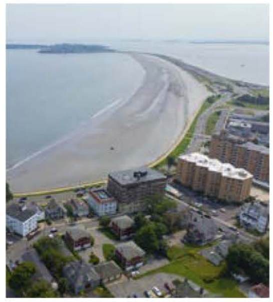
Looking Ahead

As an immediate next step, MOOR will work to coordinate a statewide summit and convene a representative Working Group to begin coalition-building efforts. Together with support from state agencies and partner organizations, these efforts will help establish shared priorities, advance early actions, and build a stronger, more connected outdoor recreation ecosystem across Massachusetts.

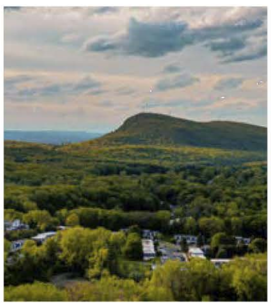
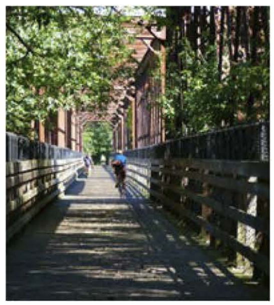




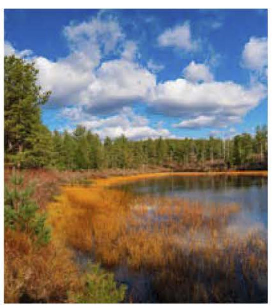
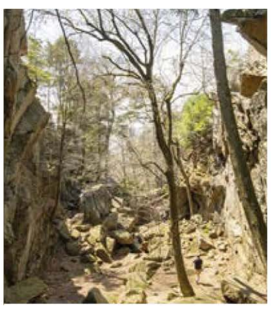


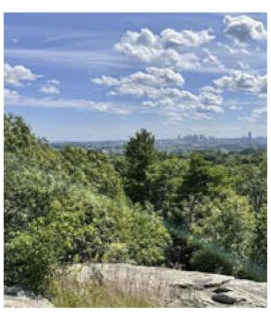




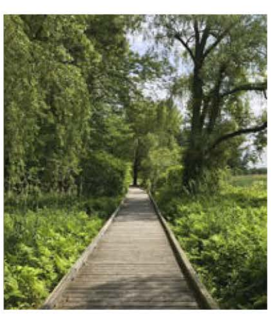












MASSACHUSETTS OFFICE OF OUTDOOR RECREATION

MASSACHUSETTS OUTDOOR INDUSTRY PATHWAYS