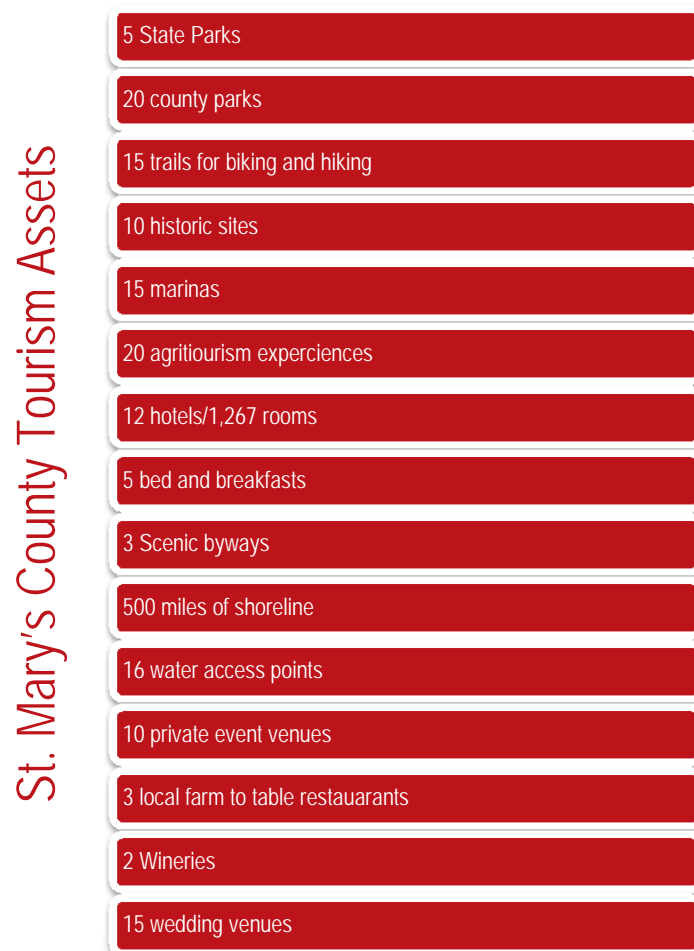


St. Mary's County Tourism Asset Review

Overview of Assets

A broad spectrum of activities and assets compose the St. Mary's County visitor landscape. There are more than 100 sites and physical assets, including more than 25 public parks, 16 public landings, 15 trails for hiking and biking, 15 marinas, 10 historic sites and museums, and a range of agri-tourism experiences. The chart below illustrates the breadth of physical assets to be evaluated in determining the priorities for the Master Plan.



Overview of Activities

The variety of activities that are available in St. Mary's County is equally as great.

St. Mary's Activities



Kayaking



Paddle Boarding



Trails



Racing



Sports



Arts & Culture



Sailing



Hunting



Fishing



Biking



Hiking



Heritage Tourism



Culinary



Lodging



Boating



Canoeing



Horseback Riding



Golf



Birding



Events



Shopping



Beach Going

Because there are so many activities and assets in St. Mary's County, setting priorities for support and investment is necessary to achieve the highest return and move the County toward becoming a strong tourism destination.

Asset and Activity Analysis

Assets and activities are organized as follows:

1. The Hotel Economy
2. Farm and Food
3. Events
4. Amateur, Youth and Competitive Sports
5. Water-Related Activities
6. Trails
7. Outdoor Activities
8. Birding and Hunting
9. Museums and Historic Sites
10. Parks
11. Arts and Culture

The Hotel Economy

The nature and variety of hotel and lodging properties play important roles in decision making by leisure travelers. The mix of lodging types and style of business is a key factor in defining markets that will deliver the most return on investment. Regardless of which market — business or leisure travel, group travel or family travel — overnight stays drive spending at a destination. Overnight visitors also increase tax revenues. Stimulating new hotel and lodging development is an important aspect of a tourism master plan and the future of St. Mary's County.

Hotel Inventory

Currently there are 1,267 hotel rooms in St. Mary's County, most of which are at limited-service hotels.

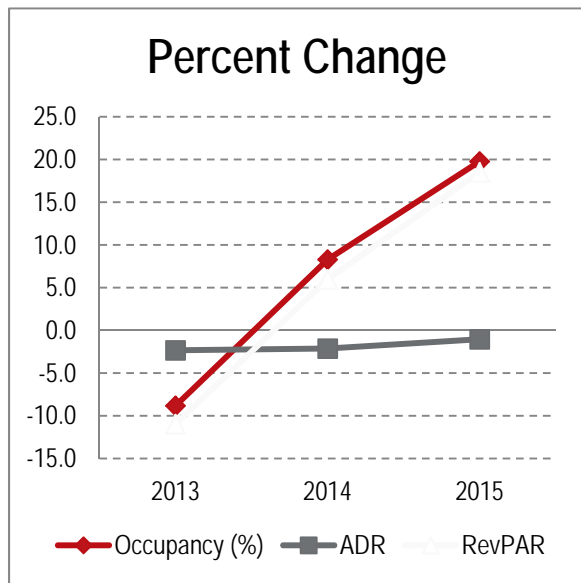
Hotels in St. Mary's County
Country Inn & Suites, California
La Quinta Inns & Suites California
Red Roof Inn & Suites, California
Super 8, Lexington Park
Holiday Inn Express & Suites, California
Charlotte Hall Motel, Charlotte Hall
Executive Inn and Suites, Leonardtown
Comfort Inn & Suites, Lexington Park
Home2 Suites, Lexington Park
TownePlace Suites, Lexington Park
Americas Best Value Inn & Suites, Lexington Park
Hampton Inn, Lexington Park
Fairfield Inn, Lexington Park
Extended Stay America, Lexington Park
Ascend Collection Island Inn & Suites, St. George Island

Current Hotel Climate

The majority of properties in the County are limited-service hotels built to serve base-related business travel. However, because of their dependency on base-related travel, rates and occupancy are overly dependent on this single market. Drops in business travel due to federal travel cutbacks and Sequestration in 2013 resulted in a decrease in occupancy as well as in the Average Daily Room Rate (ADR) charged by hotels. This in turn, has affected the government per diem rate that hotels may charge for federal travel. While it is encouraging that recent data shows demand is up 16.3% for 2015 compared to 2014, ADR has not risen with occupancy.

Local hoteliers do not believe occupancy or ADR is high enough to warrant additional limited-service hotels in this market. Furthermore, the current occupancy levels and descending ADR will create challenges in securing full-service hotel development. Limiting the number of per diem rooms sold in the market, raising ADR with weekend business, and creating new types of weekday business could help realign the industry.

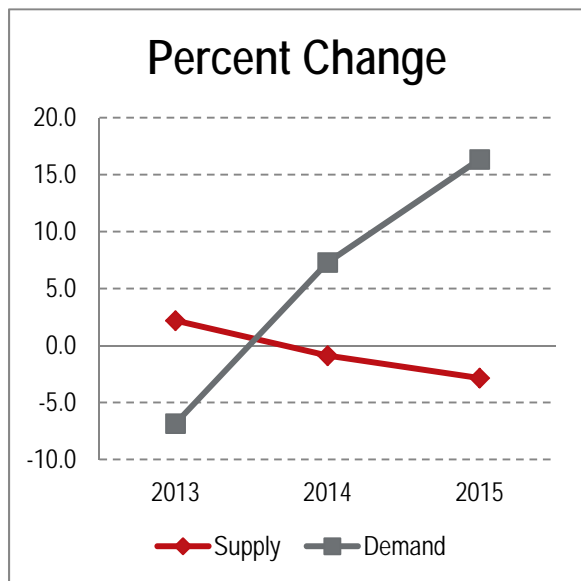
The following chart illustrates the key economic trends for the St. Mary's County hotels over the past three years.



Occupancy (%)	2013	2014	2015
This Year	46.10	49.91	59.77
Last Year	50.56	46.10	49.91
Percent Change	-8.8	8.3	19.8

ADR	2013	2014	2015
This Year	91.10	89.16	88.22
Last Year	93.28	91.10	89.16
Percent Change	-2.3	-2.1	-1.0

RevPAR	2013	2014	2015
This Year	41.99	44.50	52.74
Last Year	47.17	41.99	44.50
Percent Change	-11.0	6.0	18.5



Supply	2013	2014	2015
This Year	391,478	387,939	376,840
Last Year	383,143	391,478	387,939
Percent Change	2.2	-0.9	-2.9

Demand	2013	2014	2015
This Year	180,463	193,631	225,253
Last Year	193,733	180,463	193,631
Percent Change	-6.8	7.3	16.3

The GSA Per Diem Rate Challenge

Over the past three years, St. Mary's County has seen an annual decline in the government per diem rate set by the General Services Administration. This decline may be viewed as the byproduct of an economy that does not have other overnight travel "demand generators." With no other activities or types of business travel, it is not possible to increase performance factors that the GSA uses to calculate an area's per diem rate. This is an alarming trend that needs to be addressed in the near future. This also is an indicator of the importance of diversifying the types of visitors who come to St. Mary's County.

The government per diem is meant for official government travel although hotels often extend the rate to those doing business with the federal government such as military contractors. Some hotels have found an alternate government rate is higher than per diem but lower than RACK is a better alternative for many of these travelers, allowing the opportunity to gradually increase the rate while maintaining/growing occupancy.

Types of Hotels

Smith Travel Research places hotels into categories:

- Luxury
- Upper Upscale
- Upscale
- Upper Midscale
- Midscale
- Economy

Class Definitions according to STR:

Market Class —Hotel classes are scaled through a method by which branded hotels are grouped based on the actual average room rates (ADR). Independent hotels are assigned a class based on the ADR, relative to that of the chain-affiliated hotels in its geographic proximity. The chain scale segments are:

- Luxury – example Ritz Carlton
- Upper Upscale – example Hilton
- Upscale – example Hyatt Place
- Upper Midscale – example Clarion
- Midscale – example La Quinta
- Economy – example Days Inn

The following chart illustrates St. Mary's County Hotels by STR classification:

St. Mary's County Hotels by STR Classification							
	Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale	Economy	Limited Service
Ascend Collection Island Inn & Suites, St. George Island			✓				✓
Country Inn & Suites				✓			✓
Holiday Inn Express & Suites, California				✓			✓
Executive Inn, Leonardtown				✓			
Comfort Inn & Suites, Lexington Park				✓			✓
Home2 Suites, Lexington Park				✓			✓
TownePlace Suites, Lexington Park				✓			✓
Hampton Inn, Lexington Park				✓			✓
Fairfield Inn, Lexington Park				✓			✓
La Quinta Inns & Suites, Lexington Park					✓		✓
Red Roof Inn & Suites, California						✓	✓
Super 8, California						✓	✓
Charlotte Hall Motel. Charlotte Hall						✓	✓
Americas Best Value Inn & Suites, Lexington Park						✓	✓
Extended Stay America, Lexington Park						✓	✓

St. Mary's County does not have any luxury or upper-scale hotels. All properties are limited-service hotels that offer no extended food and beverage service. These hotels were developed to serve the business traveler related to NAS Patuxent River. The risk of having hotels appeal to only one market is evidenced by the post-sequestration impact on the local hotel industry.

Bed and Breakfasts

St. Mary's County has few unique lodging options for the leisure traveler. The Inn at Brome Howard and Woodlawn BnB both remain booked, with a high portion of wedding-related guests. Other BnBs struggle. Several are only open on a limited or seasonal basis, making them more difficult to market.

Regulations regarding occupancy numbers and fire codes can present challenges to anyone seeking to open a BnB, which tend to be located in older, historic properties.

Coltons Shipping Point Farm Cottage – two-bedroom, fully furnished cottage along St. Clements Bay. Maximum occupancy of four.

Inn at Brome Howard – 1840s inn with four bedrooms and private baths on historic grounds of St. Mary's City. Continental breakfast, which includes seasonal fruit, quiche, juices, cereal, Colombian coffee and a variety of teas. Part of Historic St. Mary's City, state-run.

Nekadesh Farm Bed & Breakfast – Two suites, each with a queen bed and bath. Continental breakfast. Internet access, pier for fishing and boat docking. Marketed mostly as a religious retreat site.

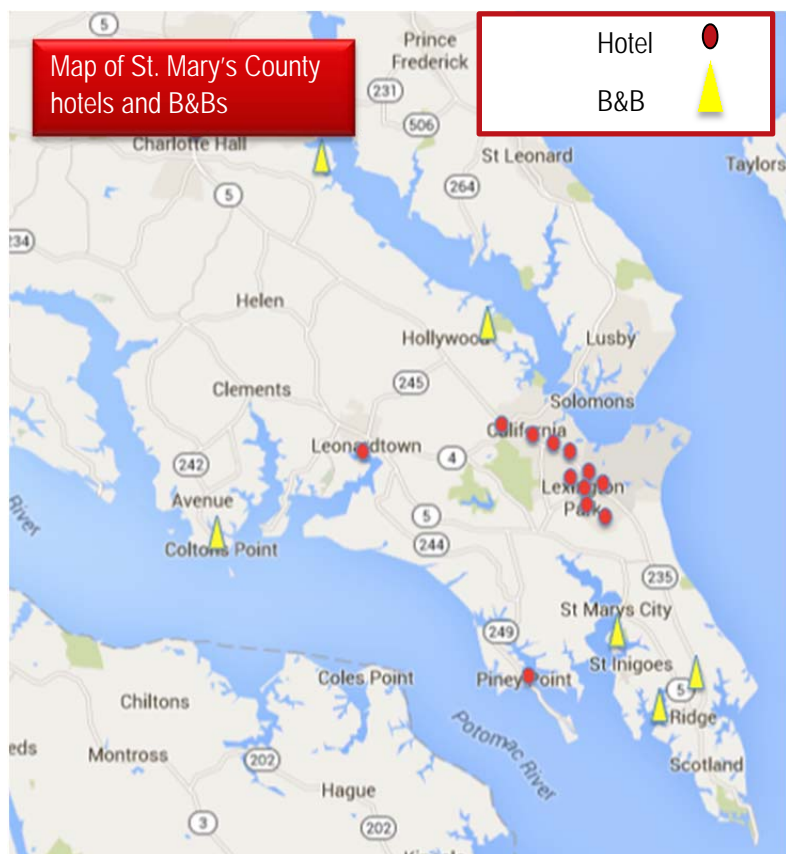
St. Michael's Manor – A 17th-century manor house with a three-acre vineyard. Complimentary breakfast. Bikes, canoe, paddleboat and rowboat are available for guests. Closed during winter months when proprietor travel.

Trent Hall Bed & Breakfast – An historic working farm on the Patuxent River, two suites with private bathrooms. Beach, pool, and pier.

Victorian Candle Bed & Breakfast – A Victorian-style house on 12 acres with 8 guest rooms and private full baths, refrigerators; some with private entrances. Includes internet.

Woodlawn Farm Bed & Breakfast – 18th-century manor located on 180 acres, views of the Potomac River. Accessible by boat.

The map demonstrates the concentration of properties along the Route 235 corridor in close proximity to the Naval Base.



Lodging in Leonardtown: Key to County Mix

Leonardtown's only lodging property is the Executive Inn and Suites on Park Avenue. This limited-service property does not offer the type of lodging experience compatible with the town's targeted leisure traveler who comes to spend a weekend of shopping, dining, art and culture. With its central location, charm, and cluster of assets and amenities, the town serves as the county's "tourism hub." Thus, the town's lodging deficiency has a great impact on the tourism industry. Industry feedback supports this view, calling for, at minimum, a boutique full-service hotel in the downtown area. Revisiting earlier plans to build a resort conference center should also be considered based on consistent feedback from visitors with interest in other St. Mary's County activities.

Vacation Rentals

Vacation rentals and the shared accommodations market are changing the way visitors book travel. The emergence of shared accommodations as a popular experience for visitors creates the opportunity to develop partnerships with the providers. This could include informing potential visitors of St. Mary's County experiences that include shared accommodations or vacation rentals. St. Mary's County has a growing vacation rental market with 10 known rentals posted on the county's Travel and Tourism website.

Airbnb is the primary example of how "home sharing" can bring more inventory to the market and create a unique experience to a destination like St. Mary's County. JLL looked into the shared accommodations in St. Mary's County and approximately 35 properties are listed between Airbnb, HomeAway and VRBO. The average nightly rate for a weekend stay is approximately \$117 and the properties range from a single room to a full house. The majority of the

shared accommodations in St. Mary's County are concentrated in Lexington Park and south to St. George's Island. This presents an opportunity to expand the lodging accommodations in the county.

Resorts and Lodges

The expansive shoreline coupled with outdoor activities that come with a rural destination may have the potential of attracting visitors who prefer to stay in resorts. St. Mary's County has one property designed to attract the leisure "vacation" traveler. This is the Island Inn on St. George Island which offers 28 water-facing rooms and is adjacent to one of the county's most popular seafood dining spots. Developing additional small resorts or lodges that cater to the types of visitors who participate in outdoor activities such as cycling, fishing, hunting, or other watersports is an important consideration in the quest to expand tourism opportunities in St. Mary's County.

Conclusion: *The limited types of lodging restrict the types of travelers who will venture to the County. Addressing and determining where new lodging should be located is critical to future tourism development in St. Mary's County and will be a critical factor in determining master plan priorities. This will require formulation of a considered economic development strategy and a close partnership with Leonardtown to achieve. The potential of a resort property developed in conjunction with the Tudor Hall Farm property development in Leonardtown is a high priority, as is having a full-service boutique hotel in the heart of the town. Such efforts will expand the opportunity to attract a broader base of visitors. The development of lodge-like accommodations near the key areas for outdoor activities is also a priority.*

Expanding markets for limited-service properties to youth tournament activities and other group markets could deliver new demand while longer-term development activities are underway.

Action needs to be taken to reverse the current downward trends in per diem rates. While this is largely in the hands of the hotels who set their rates, St. Mary's County unique circumstances should continue to be pressed with GSA.

Farm and Food

St. Mary's County's farm and water heritage provides the basis for local food-related and agri-tourism activities. Existing programs in both areas result from the efforts and programs of the St. Mary's County Division of Agriculture and Seafood, the St. Mary's County Agriculture and Seafood Commission, and the Southern Maryland Agricultural Development Commission. All will be essential partners in further development of culinary and agri-tourism activities.



Experiencing Local Cuisine

Dining has always been a popular tourism activity, and experiencing authentic local cuisine has been a high priority for tourists for many years. Today, the culinary experience is often a leading factor in determining where visitors choose to travel; food experiences that differentiate a destination and culinary events attract visitors. A June 2015 article in the Huffington Post noted that a growing number of travelers plan vacations specifically to incorporate culinary trips, and that culinary travel means more than fine dining.

Farm to Table

Concepts of "Farm to Table" experiences have become increasingly popular. The importance visitors place on their culinary experience is projected to increase over the next five years. Food-related travel meshes perfectly with experiential travel from wine tastings, to cooking classes to "how to" visits to organic farms. St. Mary's County experiences include the Amish Market at Charlotte Hall, Clover Hill Dairy, and Allen's Heirloom Homestead organic farm.

The simplest definition of "farm-to-table" is that the food on the table came directly from a specific farm or farms, without going through a store, market, or distributor. A recent survey by the National Restaurant Association of Chefs cited locally sourced meats and seafood, locally grown produce and environmental sustainability as the top three table service menu trends for 2015. The highlighted items below are potential opportunities for St. Mary's County from the national top culinary trends.

- Locally sourced meats and seafood
- Locally grown produce

- Hyper-local sourcing
- Sustainable seafood
- Farm/estate branded items
- Artisan cheeses

The definition of local

According to the definition adopted by the U.S. Congress in the 2008 Food, Conservation, and Energy Act (2008 Farm Act), the total distance a product can be transported and still be considered a “locally or regionally produced agricultural food product” is less than 400 miles, or within the State in which it is produced. In speaking with restaurant owners and representatives of the agriculture industry, the consensus is that local should mean “within St. Mary’s County” whenever possible.

Restaurants in St. Mary’s County Committed to Local Sourcing

St. Mary’s County has a number of locally-owned restaurants. However, only three meet the criteria set by the Southern Maryland Agricultural Development Commission for serving locally sourced foods.

Blue Wind Gourmet, Lexington Park

Offers local products year round: meats and poultry, dairy products, produce, wines, seafood.

Farms & Food promotion: *Promotes local farms by name • hosts events featuring local foods • participates in the Buy Local Challenge • trains staff about farms/foods.*

Elements - Eatery and Mixology, Lexington Park

Offers local products year round: meats and poultry, dairy products, produce, wines, seafood.

Farms & Food promotion: *Promotes local farms by name • hosts events featuring local foods • participates in the Buy Local Challenge • trains staff about farms/foods.*

The Ruddy Duck Seafood and Alehouse, St. George Island

Category: Restaurant, Caterer.

Offers local products year round: meats, poultry, seafood, processed foods, honey.

Farms & Food promotion: *Promotes local farms by name • hosts events*

Challenges

The commitment of local restaurants to serving local fare is directly related to the nature and dynamics of the local foods industry and to conquering the challenges of local distribution, seasonality, and cost. JLL met with local farmers, restaurateurs, and agriculture industry officials to understand specific challenges and opportunities in St. Mary’s County. These include:

- **The quantities and variety of products needed by local restaurants:** In some cases, the quantities of products that are needed are too small to warrant separate growing and production by local farmers. During some times of year, restaurants can go to food auctions and buy food.
- **Importance of promoting the local farms as part of the relationship:** In some cases, the restaurants do not promote the local farmers well, which is a key ingredient of a successful program. One of the benefits to the local farming community is raising awareness of local and regional audiences.
- **Meats and poultry:** Due to USDA regulations, all livestock must be processed in a USDA-inspected facility. There is currently no facility in St. Mary’s County, which limits the ability to serve fresh, timely products raised on St. Mary’s farms.

- **Need for more education and coordination:** A farm-to-table program that is part of a larger agri-tourism effort requires coordination and education.

Local Restaurants vs. Chain Establishments

Locally owned restaurants, especially those that feature St. Mary's County products, can be a catalyst for differentiating the overall tourism experience. It is becoming more prevalent in the tourism industry to exclusively feature local restaurants when marketing dining experiences. This will be another important strategy to consider as the master plan is developed.

***Conclusion:** Developing ways to encourage chef-driven, independent restaurants to open in St. Mary's County should be a high priority. This will require a targeted economic development strategy. Additionally, a farm-to-table program should be developed that meets the challenges of size and distribution. The partnership with SMADC in the development and support of a functional farm-to-table and agri-tourism program is a critical component of success and is the means to building a robust food-farm destination experience.*

The Amish and Mennonite Communities and other Food and Farm Experiences

St. Mary's County is home to an Amish and Mennonite communities of approximately 1,000 people. The St. Mary's County Division of Agriculture and Seafood and the St. Mary's County Agriculture and Seafood Commission (SMASC) have worked closely with the communities to assist them in establishing several successful food-related ventures. These include:

The North St. Mary's County Farmers Market, Charlotte Hall

- The market is located in a library parking lot and operates seasonally. Open six days per week on a seasonal basis, the farmers market annually does more than a million dollars in sales. SMASC is developing a plan to relocate the market because it has outgrown its present location. In addition to produce, baked and canned goods are sold at the market.

The Loveville Produce Auction, Loveville

- This Amish-owned and operated wholesale auction serves grocers and restaurants throughout the region. While it does not cater to individual customers, the spectacle of the auction and presence of the Amish community make it a visitor draw. The auction operates seasonally on Wednesdays and Saturdays.

Clover Hill Dairy, Mechanicsville

- The Amish-operated dairy produces cheese and offers baked and canned goods and a limited selection of crafts. Large windows afford a view of the cheese-making process.

Other Amish Opportunities

Further discussion of the Amish community and visitor opportunities is found in the section on Thematic Assets.

Other Farm Market Opportunities

Sotterley Plantation established a farmers' market open seasonally on Saturday mornings. The market offers organic produce grown onsite and provides space for other growers and some craft vendors.

***Conclusion:** Looking beyond the dining experience, expanding farm and food-related experiences should be considered — especially those that touch on sustainability and authenticity. Finding acceptable ways to further engage the Amish and Mennonite communities merits consideration to ensure the initiative to relocate the current Amish market provides an enhanced and expanded visitor experience.*

Wineries

The 2014 Wine Tourism Conference focused on the importance of developing a wine “experience” to attract visitors. A report from an attending business stated that visitors want to be “immersed in the culture of wine making, agriculture and become a part of the winery’s community” and that successful wine destinations provide an authentic experience. An article in Hotel and Resort Insider reported that wine tours were being developed that included taking visitors on tractors into the vineyards to understand the process and other outdoor activities.

Maryland's wine industry has experienced tremendous growth over the past decade. Wine sales have reached approximately \$26 million according to Maryland Wine Association (MWA) and there are currently 76 licensed wineries in the state. Unlike Virginia — which has extensive backing from the state tourism industry, prestigious festivals, and awards to draw interest to state-made wines and a lot of private investment — Maryland is still attempting to find its footing in the wine world. It also has a number of challenges to overcome — competition from better-known wine producing states, the perception that Maryland produces low-quality wines and the effect of climate on grapes. The market is primarily a local one, which draws day and weekend visitors.

St. Mary's County Wineries

The wine industry in St. Mary's County is less than 10 years old. It relies on small growers who are still establishing their vineyards and determining which grapes grow best in Southern Maryland with its high humidity. St. Mary's County has one winery (Port of Leonardtown Winery) and two tasting rooms (Slack Farms). Each offers a distinct experience based on location and ambience, but they are standalone wineries without onsite vineyards. With their opening five years ago, the wineries have become an important visitor draw.

Port of Leonardtown Winery, Leonardtown

POL is the product of the Southern Maryland Wine Growers Cooperative (SMWGC), the first agricultural cooperative in the state of Maryland and one of only a handful of such ventures in the United States. It is the result of a partnership between the town of Leonardtown and St. Mary's County. The winery pulls from 15 small vineyard operators, mostly located in southern Maryland, with a few located on the Eastern Shore. It employs some paid staff including its winemaker, but relies mostly on co-op members in its operations. Since opening in 2010, POL has established a reputation for producing high-quality wine and is a consistent award-winner at state and international competitions. The winery is located in a repurposed garage complex in Leonardtown in a park setting, which it shares with the launch site of the popular McIntosh Run Water Trail and a kayak rental outfitter.

The Port of Leonardtown Winery has seen changes in membership, partners and revenue streams and has reached a successful point in the co-op's brief history. The co-op desires to move the product into the wholesale market as well as drive sales via the tasting room experiences. Because it is a co-op, the operation requires a continuously strong level of engagement from members.

Slack Farms, Ridge and Leonardtown

Slack Winery is located at Woodlawn Farm, a historic property at the Southern-most tip of St. Mary's County, which operates as a B&B. The winery consists of a tasting room only. Grape growing and winemaking take place at the sister property of Jubilee Farm. The mix of B&B and a wine experience and expansive grounds presents many onsite opportunities. The site offers summer concerts and is a major destination-wedding site. However, hosting weddings and events takes away from the overall wine business and recently the proprietors have developed a new business model which employs both locations for weekend-only farm markets, tours and tastings.

Regulatory Challenges for Wineries

According to the local experts, the greatest challenge facing wineries in St. Mary's County are regulatory and permitting constraints. The current regulatory concerns surround the ability to expand operations, which would involve new construction. Additional regulatory challenges involve the types of and limits on events wineries are able to.

Needed Critical Mass: More Wineries, Wine Trails

A second challenge for wineries in St. Mary's County is lack of critical mass. "In the best wine tasting areas, including Napa, there is a critical mass of wineries that make it a wine destination," according to Jim Grube, owner/operator of Slack Winery and Woodlawn Farm. The addition of another wine experience with the anticipated opening of Still Creek Vineyard will be a positive step forward. Currently, POL and Slack are part of the Patuxent Wine Trail established by the MWA. The trail runs through Calvert and St. Mary's Counties.



Conclusion: County tourism will benefit from additional wineries. There is not enough of a "wine experience" to independently drive overnight visitors. However, wineries are a laborious and expensive start up, according to the MWA. If wineries are a tourism priority, an economic development strategy to attract and support additional wineries will be required to help expedite the process and provide assistance in getting the operation ready for visitors.

Breweries

Following its entry into the wine industry, Maryland began establishing a place for itself in the fast-growing brewing industry in partnership with the Maryland Brewery Association.

There are no breweries in St. Mary's County; Calvert County has five breweries. There is an opportunity to explore this market and encourage development for travelers interested in breweries and beer tastings, which have become popular in competitive destinations.

Robin Finnacom, Deputy Director of St. Mary's County's Economic Development Department, noted with regard to potential brewery development, that the County has met with the Alcoholic Beverage Board and other key leadership to understand the process. JLL also spoke with other counties, which have breweries and learned there is a large capital outlay in starting up a brewery. JLL interviewed Dorchester County as part of the benchmarking study and learned of a success story at RAR Brewery in downtown Cambridge. The community and economic development organizations worked collaboratively to support two entrepreneurs who had a vision for a brewery. Today RAR is a very popular business and catalyst for downtown.

Leonardtown is in the process of creating a text amendment to its commercial business zoning so as to be ready to allow a brewery to open.

There is also potential to encourage the development of cideries and distilleries that might be interesting to pair alongside breweries.

Ruddy Duck Seafood and Alehouse, St. George Island

While this restaurant does not brew beer onsite, it serves craft beer brewed at the Ruddy Duck location in Calvert County. Despite the out-of-the-way location, the restaurant — and its brews have a loyal local following and may serve as a supportive base for local industry growth.

Maryland Brewery Association

JLL spoke with Kevin Atticks of the Maryland Brewery Association (MBA) to understand the current support that is available for encouraging investment in Breweries. The MBA has created seminars on how to get started and be successful in the brewery business. The most successful seminars are presented in conjunction with the county economic development team to demonstrate the ease of doing business in the host county. This is a great example of partnering with an industry association to attract investment.

Conclusion: *The rising popularity of craft breweries is an indicator of the importance of including this industry in the master plan. There are no breweries; however, a proactive economic development strategy that specifically attracts breweries should be developed. A strategically located brewery could provide a new dimension to the overall tourism experience. The Maryland Brewery Association is a ready and willing partner in helping attract new breweries.*

Aquaculture & Oyster Farms

The State of Maryland is closely identified with Chesapeake Bay heritage and food. State agencies, such as the Department of Natural Resources, and private entities, such as the Chesapeake Bay Foundation, are involved in improving the health of the Bay and its bounty. Declines in fish and shellfish harvests have meant that the watermen's way of life is fast disappearing. However, the state is experiencing growth in the aquaculture enterprise of oyster farming. While oysters are integral to St. Mary's County's cuisine, the farms represent an untapped visitor experience.



St. Mary's County has a long history of producing high-quality oysters. The fact that the Oyster Festival turns 50 in 2016 is an indication of this. There are seven enterprises in St. Mary's County that produce farm-raised Oysters.

Oyster Producers in St. Mary's County
Hollywood Oyster Company, Hollywood
38 Degrees North Oysters, Scotland
Circle C Oyster Ranchers, Dameron
Shore Thing Shellfish, Tall Timbers
True Chesapeake Oyster, Ridge
Double T Oyster Ranch, Tall Timbers
Moonstruck Oysters, Hollywood

Oyster farming differs dramatically from traditional oyster harvesting and relies on seeding and raising oysters in beds rather than dredging them in the wild. Oyster farming operations present opportunities to combine agri- and eco-tourism in ways that are unique to the region. However, as with agri-tourism enterprises, creating a visitor experience moves well beyond simply opening one's establishment to the public. Access, hours of operation, interpretive programming, safe facilities, staffing and marketing all enter into the mix. Often, this is well beyond the scope of entrepreneurs facing the immediate challenges of growing their core business. Nevertheless, those that are able to add a visitor component early on as the industry develops will have a tremendous advantage in the tourism marketplace. With five viable operations, this is an area where St. Mary's County could truly move ahead. This opportunity needs serious consideration within the master plan.

Currently, only a few local restaurants sell locally-raised oysters. It will be important to improve the coordination of selling locally raised Oysters as part of the overall farm-to-table program discussed above. This will include determining if there are any regulatory hurdles in developing a sustainable program.

Conclusion: *Oyster farming as a visitor experience presents a great "fit" for St. Mary's County with potential to develop into a tourism component, especially when combined with other farm-to-table or eco-tourism experiences. Initial work with this young industry has not yet been done, in terms of readiness to integrate visitor programs into their business models.*

On-Farm Activities

Farms in St. Mary's

The number and variety of farms in St. Mary's County provides a good starting point for many distinctive experiences. The Southern Maryland Agriculture Development Commission (SMADC) published the following list of farm-related operations in St. Mary's County. Offerings range from tours, corn mazes, pick-your-own, or other types of activities. Operations that offer visitor experiences include: Allen's Heirloom Homestead, Bowles Farms, Forrest Hall Farm, Oyster Point Organic Farm, Southern Comfort Berry Farm, Moore or Less Farm, Suttler Post Farm, and Nobella Alpacas.

Grains	
Alvey Brothers Farms, Clements Beale Farm, Loveville Callaway Farm, Leonardtown Fairfield Farm, Park Hall	Moore or Less Farm, Bushwood T and A Farm, Dameron Weaver's Flower and Herb Garden, Leonardtown
Vegetables	
Alvey Brothers Farms, Clements *Allen's Heirloom Homestead, Lexington Park *Bowles Farms, Clements Beale Farm, Loveville Even' Star Organic Farm, Lexington Park Fairfield Farm, Park Hall *Forrest Hall Farm, Mechanicsville	Free Spirit Farm, Mechanicsville Friendly Hall Farm, Mechanicsville *Oyster Point Organic Farm, Abell Russell's Farm, Clements *Southern Comfort Berry Farm, Bushwood Trossbach Produce, Scotland Finch Family Farm & Nursery, Helen
Fruit	
Berrywood Farm, Hollywood Callaway Farm, Leonardtown Even' Star Organic Farm, Lexington Park *Forrest Hall Farm, Mechanicsville Free Spirit Farm, Mechanicsville *Southern Comfort Berry Farm, Bushwood	Oyster Point Organic Farm, Abell Russell's Farm, Clements Swell Honey Farm, Ridge Trossbach Produce, Scotland *Moore or Less Farm, Bushwood
Apiculture (Bees/Honey)	
Stauffers Farm Fresh Eggs, Leonardtown	Swell Honey Farm, Ridge
Livestock	
Alvey Brothers Farms, Clements Fairfield Farm, Park Hall	*Forrest Hall Farm, Mechanicsville WAG Meats, Leonardtown
Poultry	
Allen's Heirloom Homestead, Lexington Park Stauffers's Farm Fresh Eggs, Leonardtown	T and A Farm, Dameron
Aquaculture	
Circle C Oyster Rancher Association, Dameron 32 Degrees North, Scotland	Kellam's Seafood, Ridge
Horse Farms/Equestrian Centers	
Arabesque Farm, Leonardtown Persimmon Farm, Mechanicsville	Mount Olive Farm, Valley Lee Greenwell State Park Foundation, Hollywood

Hollywood Pony Farm, Hollywood El Najah Arabians, Mechanicsville	*Suttler Post Farm, Mechanicsville Endless Endeavor Farm, Mechanicsville
Other	
Ferny Brae Sheep & Wool Farm, Leonardtown	*Nobella Alpacas, Leonardtown

Examples of types of activities that blend well with agri-tourism include:

1. Farmers Markets and Specialty Products
2. Product Processing
3. Fairs, Festivals, and Special Events
4. Horses and other Farm Animals
5. Unique Dining Experiences
6. Wildlife and Fish
7. Education
8. Heritage and Culture
9. Arts and Crafts
10. Farm or Ranch Stays
11. Farm Tours
12. Pick, Cut, Gather or Grow Your Own.

Conclusion: Due to the number and variety of farms in St. Mary's County, there may be room for additional visitor experiences. However, adding visitor experiences to farming enterprises takes much effort, and most sections of the county offer similar experiences. Finding what can differentiate a farm experience in St. Mary's County from another county would be necessary for any successful new venture. SMADC's Trails Program which combines art and agriculture experiences is one example. Tapping into other trends to include farm-to-table, eco-tourism, or art and culture may be required.

Equestrian Activities

The Southern Maryland Historic Horse Trail is a joint project of the Southern Maryland Agricultural Development Commission and the Maryland Horse Industry Board and is part of a recent State initiative to develop products that capitalize on the State's equine heritage. The Southern Maryland Trail is one of a network of heritage trails across the state that highlights the contribution of horses to Maryland's history and culture. Photos, anecdotes, and other site information collected for this project will become part of a statewide catalog documenting the role of horses in Maryland's history.

The Southern Maryland Trail features stories and sites in Calvert, Charles, Prince George's and St. Mary's counties that illustrate the role of horses in the region's past. The centerpiece of the project is a mapped, self-guided trail of documented, equine-related destinations throughout the region that will offer historical insight and educational opportunities. In addition to the online version of the Trail, a printed guidebook will be published in conjunction with SMADC's equine directory in fall 2016.

Five County sites are currently in this developing program: Greenwell State Park, Historic St. Mary's City, Sotterley Plantation, Christ Church Chaptico, and Leonardtown.

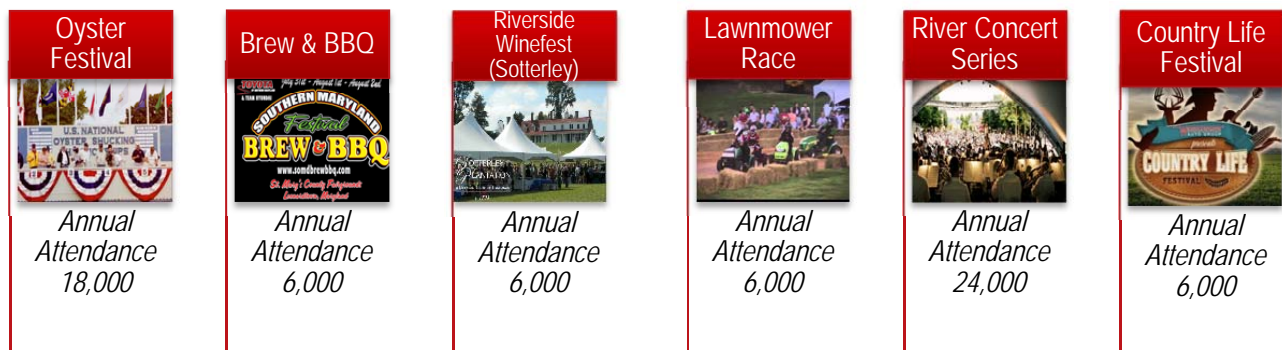
In addition, the following places also offer opportunities for equestrian experiences in St. Mary's County: Arabesque Farm, Persimmon Creek Farm, Hollywood Pony Farm, Mount Olive Farms, and Suttler Post Farm.

***Conclusion:** The popularity of horses and equestrian activities warrants consideration in the planning process, especially in light of the State of Maryland's commitment to the industry and the strong programs and support offered by SMADAC. St. Mary's County should consider further development of activities. Currently there are no consistent opportunities to experience an equestrian operation or ride a horse on St. Mary's County trails. These activities, while popular, require investment and a sustainable operation. The development of the equestrian experiences will be a low priority for the foreseeable future.*

Events

There is a wide variety of events in St. Mary's County and Southern Maryland. Most have a local or regional draw, and many are produced by nonprofit organizations and serve solely as a fundraising mechanism to support charitable causes. While these organizers would like to increase event attendance by attracting out-of-area-visitors, most have neither the manpower nor organizational infrastructure to greatly expand their event's focus or reach. To use events as a means to draw visitors, Leonardtown employs a full time events manager and works closely with the Leonardtown Business Association in event production. Events such as Beach Party on the Square, Christmas on the Square, and Veterans Day Parade draw day visitors from throughout Southern Maryland.

Below are the events with the highest attendance and draw at least some visitors from outside of the region. However, hoteliers report that events have little impact on weekend occupancy.



Source: St. Mary's County FY15 Annual Report

Below is a chart that indicates the type for criteria used for determining the tourism potential and sustainability of events.

	Total Points	Max Points Per Component	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation		5	1	2	3	4	5	
Program Components								
Tourism Promotion*								0
Benefit to the Destination*								0
Innovation								0
Evidence of Partnership								0
Management Capability								0
Organizational Structure and Capability								0
Economic Impact								0
Use of Brand								0
Quality of Research								0
Suitable Target Market								0
Comprehensive Marketing Approach								0
Degree of Match								0
Previous Replacement Funding								0
Evaluation/Measurement Plan*								0
Attendee Satisfaction								0
Room Nights								0

Scale of Project								0
Application Quality								0
Unique Selling Proposition								0
Total	95							0

Signature Events

In the development of an event strategy to drive overnight stays, the value of developing a “signature event” should be considered. A signature event will not only have significant economic impact, but will be a catalyst for year round tourism demand. In essence, a signature event should reinforce a positive attribute of a destination and support the overall brand. This will be reviewed in the next phase of the master plan process.

St. Mary’s County Fairgrounds

The St. Mary’s County Fair Association operates the St. Mary’s County Fairgrounds under a lease agreement with the St. Mary’s County government, which owns the land. The Association produces the annual county fair, maintains the grounds, buildings and equipment and pays for any new facilities out of its own funds. The fairgrounds and the association are considered significant community assets, and the grounds are made available to local nonprofits or other groups at modest cost for fundraising and for-profit events. The association views its mission as one of service to the community. While it is not averse to increasing tourism, the association would not welcome any attendant expansion of facilities that would warrant additional operational and maintenance support. The County Fair and Oyster Festival are the two largest events at the fairgrounds.

Events Coordination

A means to coordinate events among producers surfaced during focus groups and other discussions. The few major events typically fall during peak weekends for the hotels, which are the same weekends that swim tournaments take place. Date conflicts between these established events and the nation body governing the tournament qualifying schedule are unlikely to be resolved at this point, and all major events for the most part continue on the same month and weekend schedule from year to year. A collaborative web-based scheduling calendar might avoid some conflicts if all parties provide information on their events and do it well in advance to avoid conflicts during sold out weekends. A comprehensive calendar of events is currently maintained with full public access.

Conclusion: Focus groups and interviews with hoteliers in St. Mary’s County indicate that few events draw overnight guests. While community events add significantly to quality of life and unite the community through charitable causes—the majority of events in St. Mary’s County are produced by local nonprofit agencies as a means to raise funds—their primary objective does not always align with the tourism objective of “heads in beds.” Determining which events have the greatest potential and capacity to attract overnight visitors will be an important component of the master planning process. The potential development of a “signature event” that will enhance awareness and year round visitors deserves analysis. Finally, a collaborative scheduling calendar to align events and weekends when hotels are not booked with sports tournaments could also be of use.

Amateur, Youth and Competitive Sports

This section looks at the value of youth and amateur sports and current facilities, programs, and operations in St. Mary's County, with an eye to determining the merit of entering the youth sports market and includes a discussion that addresses local interest in developing a sports complex in St. Mary's County.

See the Outdoor Activities Section for discussions regarding competitive cycling and running.

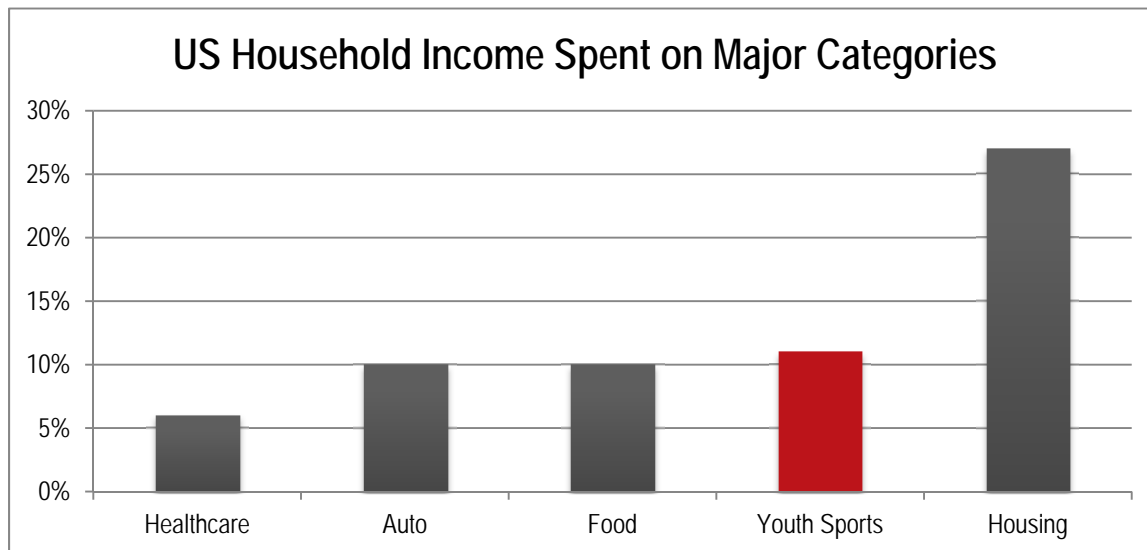
Youth and Amateur Sports

Overall trends related to youth participation in team sports are outlined in the following pages. The breadth of participatory youth sports is wide as depicted in the following chart.



Overall Trends – Second-largest U.S. household expenditure

In reviewing overall trends in youth sports, a 2014 MSNBC article reported that the youth sports movement has become a \$7 billion industry and estimated that 35 million kids between ages 5 and 18 play an organized sport in the United States each year. Another recent study showed that 60% of all youth who play organized sports participate in sports outside of their school. The following chart depicts the ranking of youth sports as the second-largest family household expenditure.



Source: US Department of Labor Expenditures Survey, September 2015

Participation Trends

	2009 (000S)	2014 (000S)	PCT. CHANGE
Baseball	7,012	6,711	-4.3%
Basketball	10,404	9,694	-6.8%
Field hockey	438	370	-15.5%
Football (tackle)	3,962	3,254	-17.9%
Football (touch)	3,005	2,032	-32.4%
Gymnastics	2,510	2,809	11.9%
Ice hockey	517	743	43.7%
Lacrosse	624	804	28.8%
Rugby	150	301	100.7%
Soccer (indoor)	2,456	2,172	-11.6%
Soccer (outdoor)	8,360	7,656	-8.4%
Softball (fast-pitch)	988	1,004	1.6%
Softball (slow-pitch)	1,827	1,622	-11.2%
Track and field	2,697	2,417	-10.4%
Volleyball (court)	3,420	2,680	-21.6%
Volleyball (sand/beach)	532	652	22.6%
Wrestling	1,385	805	-41.9%

Source: 2015 SFIA U.S. Trends in Team Sports

The chart above illustrates the changing nature of participation in youth sports. Currently some sports are on the upswing, including ice hockey and lacrosse. While there are shifts in participation of certain types of sports, the overall trends indicate the importance of the sports market for a destination.

Entering the Youth Sports Market and Providing Tournament Facilities

There is good precedent for the youth sports market in St. Mary's County, as youth swimming tournaments pull teams from throughout the region and fill local hotels. This illustrates the link between this market and adequate facilities as the Olympic trial-sanctioned pool at St. Mary's College is the only such pool in the region that meets the sanctioning body's requirements. More insight came from discussion points during a March 16, 2016 meeting that included representatives from local sports clubs and organizations, the directors of St. Mary's County Recreation and Parks, and Department of Public Works and Transportation, the directors of athletics and sports facilities at St. Mary's College, and the master plan executive team.

- There was consensus that there should be a central (and multi-use) sports "complex" or facility (in a public-private partnership).
- It makes sense to use existing facilities as ancillary locations to support a main complex.
- Use of existing sports assets would reduce the size of any future sports complex or facility, making it more attainable/affordable.
- A huge facility won't be able to support itself based on other examples around the state and country. Having the ability to accommodate local athletes and drawing those from outside the County are not separate issues, but would support each other.
- Indoor space should be considered as part of a new complex to allow year-round usage.
- St. Mary's College's sports facilities, in addition to the pool, present ample capacity for use by outside sports organizations but the college does not have the manpower to promote or coordinate such use.
- The college is hoping to open another stadium complex in two to four years.
- Good training facilities are needed to draw travel teams to our area. St. Mary's County currently has a poor reputation in the youth sports world as it does not have proper facilities to accommodate these teams and tournaments. Good facilities are needed to develop competitive local teams that feed tournaments.
- A first step might be establishing a marketing and coordinating authority that could bring together all local sports facilities, respond to RFPs, and bring tournaments and travel teams to the county.

Additional discussion focused on adult competitors, especially runners.

- St. Mary's County is cyclist and runner friendly, with many good races already held here. While perhaps not feasible for a "Boston Marathon," qualifiers for national races draw substantial participation.
- Besides the youth sports market, consider the "master" athletes, those 30 and older who are sometimes former Olympians, who are still competing in various sports and sporting events.

See the Outdoor Activities section for discussions regarding competitive running and cycling.

St. Mary's College — Potential Short-Term Opportunity

JLL has worked with Scott Devine, Director of Athletics and Recreation for the athletic department of St. Mary's College, to determine the layouts and capacities of their athletic facilities for outside tournaments. They have concluded that there is an opportunity to host 5 to 10 additional events at St. Mary's College sports facilities depending on size and length. The athletic department does not have the staffing capacity to sell and service additional events. This is a potential short-term opportunity if the needed support could be created to sell and service

these events. Dedicated staff time is necessary to sell St. Mary's County to sports event organizers. Also needed to be successful are personnel to service the needs of the organizations when their event is in St. Mary's County. Other tourism organizations interested in developing the youth and amateur sports markets have dedicated resources to support this effort.

The following is a list of sports venues for amateur and youth sports at St. Mary's College:

Baseball	Hawk's Nest
Basketball/Volleyball	Michael P. O'Brien Athletics & Recreation Center Arena
Field Hockey/Lacrosse/Soccer	Seahawk Stadium
Sailing	The James P. Muldoon River Center and Waterfront
Swimming	The Aquatics Center at the Michael P. O'Brien Athletics & Recreation Center
Tennis	Somerset Tennis Complex

Overview of Opportunities for additional events

There are some windows of opportunity to host additional tournaments by outside groups at the college based on its schedule. The potential dates include the College's winter break in December, the weeklong spring break, the month of May — except graduation weekend — and from mid-July to mid-August. St. Mary's College determined it could add 5-10 events annually for greater tourism and community needs depending on the type of event and time of year. With sales and service support, this is a short- to medium-term opportunity to drive additional visitors.

Sports Venues

St. Mary's County has capacity for sporting events for recreation and competitive youth and amateur sports. Budds Creek Motocross and the Maryland International Speedway are the primary venues for racing on dirt and paved tracks. Both are primarily used for private races and events. St. Mary's County also has various outdoor sporting venues as noted in the parks section of this report. The parks include amenities such as baseball diamonds, disc golf courses, and tennis courts.

***Conclusion:** National trends and participation levels in youth sports make this market worthy of exploration. However, entering the youth sports market and eventually building a facility represents a huge commitment on the part of local government at many levels — from land acquisition to developing public-private partnerships. There is current widespread call for a recreational facility for local use, but what type of facility and where is yet to be determined. It is vitally important that the conversation be expanded to entertain a move into the sports market based on the potential positive economic impact this market would have for St. Mary's County.*

Moving forward should be in accordance with standard economic development lines to include a feasibility study and engagement with the Maryland Sports Authority.

A shorter-term opportunity, existing local sports venues could be better used if means to coordinate and market them could be found. St. Mary's College has ample facilities and schedule opportunities but lacks the personnel to support the sales and service functions.

As with many areas of the master planning process, the cooperation of other entities and willingness to expand the scope of their purviews from provision of local services to attraction of outside markets is critical to the success of this effort. A collaborative partnership with the St. Mary's County's Department of Recreation and Parks is instrumental at every level.

Motorsports

St. Mary's County has three racing venues adjacent to each other in Budds Creek, a rural area just across the St. Mary's-Charles County line. While Budds Creek is an ideal location for track operators given the noise and vehicle traffic generated, the isolated location has been an impediment to realizing any appreciable economic impact from visitor spending. Race fans and race teams gain easy access to MDIR and the two adjacent tracks via Route 301 through Charles County whether traveling north from Virginia or south through D.C. Those races that draw overnight attendance fill hotel rooms that line Route 301 in Charles County. While those traveling south have a first opportunity to access Budds Creek via Route 5 which runs through St. Mary's County, the lack of race-friendly amenities in Charlotte Hall (chain restaurants and hotels), and the fact that the last leg of the trip along Route 236 is a winding road and major route for Amish buggies, make this option less desirable.

Maryland International Raceway (MIR)

The largest motorsports facility in Maryland features IHRA Championship Drag Racing. MIR hosts more than 100 events annually from March through November and seats 11,000 fans. MIR averages 100 races each year with an attendance of 100,000 in 2015. Nearby IHRA tracks are in Crofton, Maryland and Richmond, Virginia mean race fans are within easy drive distance of tracks for single-day events.

Potomac Speedway

The 3/8-mile clay oval stock car racetrack seating 4,000 runs approximately 20 races each year with an attendance of 20,000. In speaking with Denise Hollidge, general manager of the Potomac Speedway, attendance figures have steadily declined over the past 5 years.

Budds Creek Motocross Park

Budds Creek Motocross Park is a world-renowned, natural terrain motocross track. It hosts events nearly every weekend, and has held many major motocross events. The park runs approximately 10 races each year with an attendance of 18,000.

Past Interest in Adding Assets to Budds Creek

In recent years, there has been occasional outside interest in creating other race-related opportunities at Budds Creek to include building something akin to Summit Point Motorsports Park in West Virginia which offers racing circuits for amateur automobile, kart, and motorcycle racing, high performance driver education and emergency training for local and federal law enforcement. The proximity to federal agencies in D.C. combined with a rural location was a driving factor. Failure to proceed appears to have been lack of backing and resources on the part of the would-be developers, and site challenges.

Wicomico Shores

Motorsports participants might also take advantage of golf opportunities at the County-owned and run Wicomico Shores Golf Course and its restaurant. Neither the golf course nor its restaurant attracts current motorsports fans.

Southern Maryland BMX

Southern Maryland BMX, Inc. operates a BMX track in the County's Chaptico Park, just south of Budds Creek. The nonprofit organization that offers individuals of all ages the opportunity to compete at local, state, and national levels. Races are structured by age and class.

Conclusion: *Overcoming the challenges of the isolated location and fan-friendly amenities offered in Charles County, present a tall order. Royce Miller of MIR believes that construction of a chain restaurant in Charlotte Hall would motivate fans traveling south to access the racing venues via St. Mary's County, thereby providing opportunities for increased spending. As Charlotte Hall continues to see development along Route 5, this may occur. However, the mix of Amish buggies and race traffic on Route 236 may still make this the less desirable option.*

Other ways to generate more economic impact from Budds Creek may merit exploration. For example:

- *Utilize the tracks for concerts and other outdoor activities. For example, Budds Creek Motocross has held Red Frog Warrior Dashes that have brought up to 20,000 participants.*
- *Create a race-centric attraction at Budds Creek that appeals to a broader audience such as a "Motorsports Exploration Center" that includes track tours, tells the history of the sports and includes race-related collections. This could add a much needed family-focused attraction to County visitor offerings.*

Water-Related Activities

Water Access

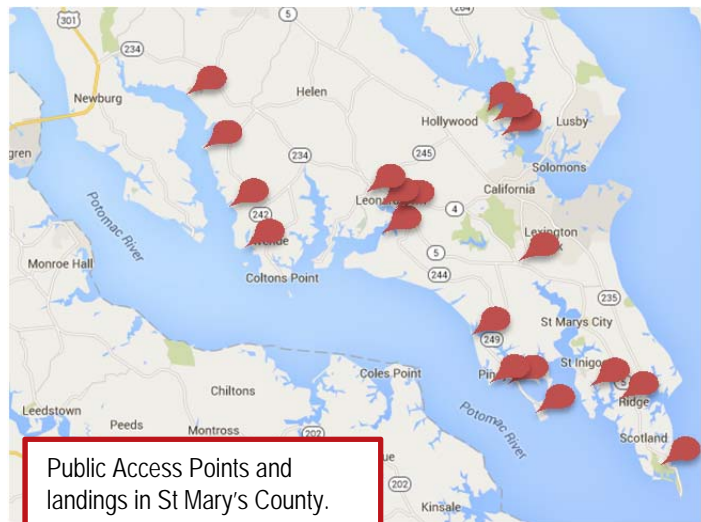
The proximity to the Chesapeake Bay and Potomac River and the County's extensive shoreline provide significant opportunities to increase the number of visitors to St. Mary's County. The importance of water access in St. Mary's County cannot be understated. Water location is listed as the number one strength in the master plan SWOT analysis and lack of access, is the number one weakness.

The Water Activities focus group felt that enhancing existing water access points such as public landings is as important as creating new access points

Public Landings

St. Mary's County has 20 public landings and launch sites for recreational water activities. Offerings at sites vary and include boat tie ups, docks, and simple paddle launch sites. At most of them, parking is limited.

In developing the tourism master plan, enhancing existing launch sites and creating new ones must be balanced with environmental regulations (see the Regulatory Environment section of this report). The Department of Recreation and Parks will soon engage in an update to its Parks plan which will include the county's public landings. Visitor use and needs should be taken into account.



Water access points with notations as to functionality offered by the Chesapeake Paddlers Association.

Name	Owner Type	Parking	Notes on Access Points for Kayakers
Piney Point Museum Soft Launch	COUNTY	15	Mechanical launch unacceptable for sea kayak, gated except museum hours.
St. Clement's Island Museum	COUNTY	20	Riprapped at museum. If paddle-in campsites developed on Island, need overnight parking.
Paul Ellis Landing	COUNTY	5	Pier only, no soft launch for kayaks.
Bushwood Wharf	COUNTY	15	Ramp launch only, no soft launch for kayaks.
Chaptico Wharf	COUNTY	15	Ramp launch only, no soft launch for kayaks.
River Springs Landing	COUNTY	0	This is really just a landing pier for watermen's boats. No soft launch for kayaks
Greenwell State Park	STATE	18	450 foot carries downhill. Existing paddle-in campsite limited to 4 — too small for most groups.
Wicomico Shores Landing	COUNTY	12	Can launch at the beach here, but a pretty long carry from the parking area.
Camp Calvert Landing	COUNTY	2	
Tall Timbers Landing	COUNTY	3	Very difficult to use this because of marina traffic and parking.
Leonardtown Wharf Public Park	MUNICIPAL	3	Mechanical kayak launch is unacceptable for sea kayaks
Great Mills	COUNTY	18	Launch is on St. Mary's River, pretty shallow at this point.

Canoe/Kayak Launch			
Port of Leonardtown Park	MUNICIPAL	10	Nice launch on Macintosh Creek, shallow water at low tide.
Elms Beach Park	COUNTY	30	At least 200-foot carry to the beach
Myrtle Point Park	COUNTY	15	300-foot carry to beach. Use Clarkes Launch at landing near Stoney's. Potential for paddle-in campsite.
Piney Point Lighthouse Museum and Park (transient dock)	COUNTY		N/A for kayakers
St. Clement's Island State Park	STATE	na	Great rest stop for kayak trips. It would be great if PLO SP would open this for paddle-in kayak camping.
St. Mary's City Park	OTHER	7	Good beach launch. Parking usually directed elsewhere, use discouraged when college is in session.
Point Lookout State Park - Marshland Nature Center	STATE	12	This is a dock launch. We usually get waterfront campsites and launch from our site.
Point Lookout State Park - Swimming Beach	STATE	68	Direct beach launch on the river, which is often quite rough.
Point Lookout State Park - Pet Beach	STATE	0	May be a rest stop, but difficult to use as a launch due to lack of parking.
Newtowne Neck State Park	STATE	10	Existing launch is onto Saint Nicholas Creek from small bank.
Point Lookout State Park - Boat Ramps	STATE	100	Ramp launch. We don't often use this.
Point Lookout State Park - Camp Store	STATE	50	At boat ramp
St. Inigoes Landing	COUNTY	12	Good beach launch without need to use ramp.
Piney Point Recreation Area	COUNTY	20	Ramp launch, no beach because of bulkheads and riprap.
Abell's Wharf	COUNTY	18	Beach launch onto upper part of Breton Bay; somewhat superseded by Newtowne Neck SP launch.
Forrest Landing	COUNTY	12	Ramp launch onto Cuckhold Creek.
St. Mary's Lake	STATE	80	Ramp launch, but lake is small.
Newtowne Neck State Park	STATE		2 new launches and 2 or 3 paddle-in campsites are planned for development.
St. Inigoes State Forest	STATE		A soft launch/paddle-in campsite(s) planned. Wonderful beaches, best in the county.

There are also some plans that could greatly enhance accessibility to the water: further development of the Leonardtown Wharf Park and waterfront to include a boat dock (see the Leonardtown section) and launch points and a boat dock at Newtowne Neck State Park. The latter is many years away and subject to state funding.

In-Water Trails

St. Mary's County's water trails offer touring by kayak and canoe for beginner and experienced paddlers. Six trails along the Western Potomac were mapped and published in a Map and Guide in partnership between the Department of Recreation and Parks, SMCT, and DNR. The routes are also mapped on the Travel and Tourism website. DNR has also mapped and published a water trail for Point Lookout. Both guides are also available from DNR. The Captain John Smith Trail is a multi-state trail discussed in the trails section of this report.

Water Trails in Western St. Mary's County
Wicomico River Trail
McIntosh Run Trail

Upper St. Mary's River Trail
Herring Creek Loop Trail
Piney Point Creek Trail
St. Inigoes Trails
Water Trails on the Lower Potomac River
Point Lookout Water Trail
Captain John Smith Trail

With the exception of the Smith trail, local paddleboard experts have indicated that these trails are more for weekend recreational kayakers. Serious kayak touring requires a system of paddle-in campsites or lodging facilities spaced about 10-15 miles apart along major waterways. There is currently one such site at Greenwell State Park, but it is limited to 4 persons per night. Two campsites are slated for development at Newtowne Neck State Park, and one at St. Inigoes State Forest. Others could be developed at St. Clements Island, at Point Lookout State Park, and at Myrtle Point Park according to the Chesapeake Bay Paddlers.

Water Excursions and Eco-tours

Ecotourism is defined as responsible travel to natural areas in a way that conserves the environment and improves the welfare of local people. Many "tourism forecasters" predict that ecotourism, nature, heritage, cultural, and "soft adventure" will grow rapidly over the next two decades. The International Ecotourism Society predicts that ecotourism could account for 25% of the global travel market within the next six years. This is an important trend to consider in the planning process.

Ecotourism in St. Mary's County is primarily a self-guided experience along the various water trails and birding locations. For example, Leonardtown's McIntosh Run winds through three ecosystems including 58 acres of Interior Dwelling Species (FIDS) habitat and Breton Bay.

Watermen Heritage Tours

The Watermen's Heritage Tourism Training Program was developed by a group of Chesapeake nonprofit organizations. The partnership was initiated and organized by the Chesapeake Conservancy. The program was created to support commercial watermen as a secondary avenue for income during slower times.



Currently, St. Mary's County has one certified guide offering heritage tours; three guides operate from Solomons Island in Calvert County. Phil Langley of Fish the Bay Charters offers tours in St. Mary's County. He attributes 5% of his overall business to Watermen Heritage Tours. However, Captain Langley believes there is a strong opportunity for growth. According to Langley, qualified support staff is the biggest hurdle in developing this line of business. With additional support, Langley feels this kind of experience could develop into a major avenue for tourism in St. Mary's County. This also corresponds to trends in "experiential tourism."

Other Types of Water Excursions

In addition to Watermen Tours, Langley offers sunset and lighthouse cruises. While Langley's location is fairly isolated, cruise operations out of Leonardtown could be attractive. The well-established Smith Island Cruises operating out of the boat launch at Point Lookout State Park takes passengers to iconic Smith Island. The cruise is more similar to ferry service as it provides no onboard interpretation and can be expensive for families at \$45 per

passenger. Finding ways to work with the Tyler family, which runs the cruises, to include packaging with South County B&Bs and attractions, could enhance benefits to South County.

Watermenn Heritage Tours

- Fish the Bay Charters, Dameron
- In addition to Watermen's Heritage Tours which focus on bay ecology and heritage, Fish the Bay offers fishing charters, sunset and lighthouse cruises and has shoreside cottages that may be rented for overnight stays.

Other Tours

- Smith Island Cruises
- Smith Island Cruises offers a daytrip from Point Lookout State Park to Smith Island. The island is emblematic of the Watermen's way of life and features a small museum and a restaurant. The trip does not feature onboard programming.

***Conclusion:** Improving water access is a high priority. Ensuring that existing access points have adequate parking, and signage is important, as is giving priority to those access points that will have the largest impact for visitors with additional investment and support will be the next step.*

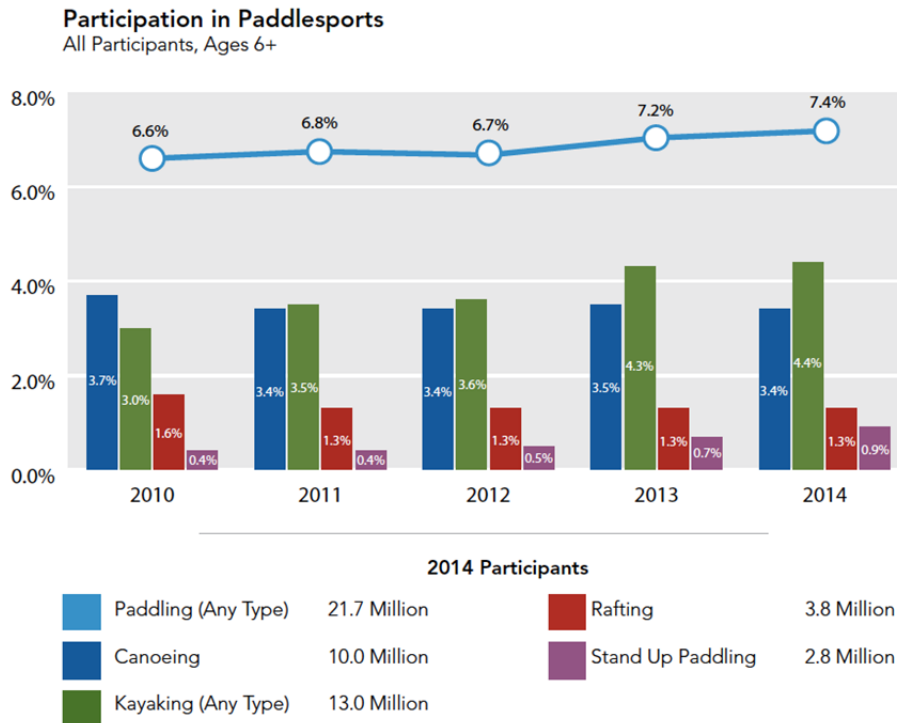
Water trails are also important as they provide the "road maps" for recreational paddlers. With 500 miles of shoreline including tidal inlets and creeks water trails go hand-in-hand with ecotourism and birding. Regional trails such as the John Smith Trail and The Potomac Segment Plan also offer opportunities for longer paddle tours. Combined with such assets as the Inner Harbor in Baltimore, Accokeek Farm in Prince George's County and Mallows Bay in Charles County, St. Mary's County should give serious consideration to enhancing its water access points and paddle tour opportunities along the Potomac. Wicomico Shores Landing also merits close study.

Waterman's Heritage Tours have potential to grow in the immediate future. This regional program supported by both Virginia and Maryland, ties together heritage, eco-tourism and experiential activities in a captivating way as the tours are conducted by experienced watermen. However, success and expansion is dependent on available watermen or charter captains willing to enter the field and capable of providing a quality experience. At the same time, being able to deliver passengers is critical. A first step to increasing the number of tour operators might be to ensure full support of the existing operator and supporting recruitment and training of a second to be based out of a location with a high visitor potential such as Leonardtown.

Partnerships with Smith Island Cruises also merit exploration.

Paddlesports

The popularity of paddle sports continues to rise according to a 2015 report by the Outdoor Foundation, the foundation that supports and conducts research for the Outdoor Industry Association. According to the 2015 report, 21.7 million Americans or 7.4 percent of the population participate in one or more paddling sports. This is an increase of more than 3 million participants since 2010. It is also interesting to note in assessing this potential market that paddlers average seven outings annually. This is an opportunity for St. Mary's County.



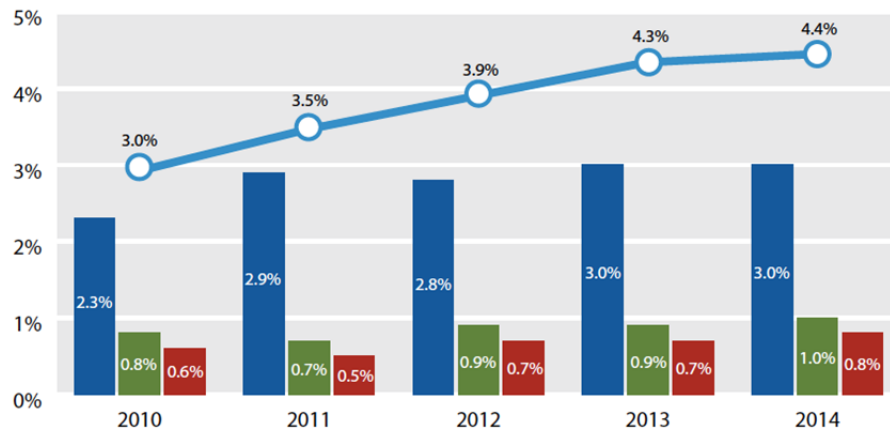
Source: The Coleman Company Inc. and the Outdoor Foundation

Kayaking

The overall level of interest in kayaking has increased over the past four years. Kayaking is the most popular form of paddling, increasing from 3 percent of Americans participating in 2010 to 4.4 percent in 2014. While the less popular forms of sea/tour kayaking and whitewater kayaking made marginal gains in participation in 2014, recreational kayaking remained stagnant. Still, recreational kayaking is, by far, the most popular type of kayaking.

Participation in Kayaking

All Participants Ages 6+

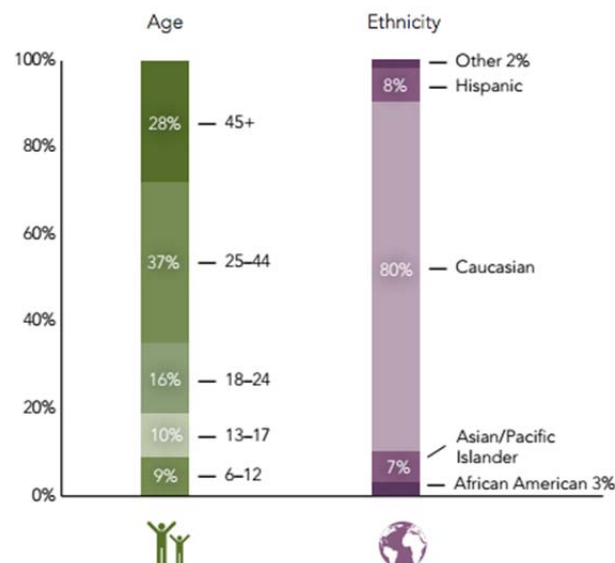


2014 Participants



Source: The Coleman Company Inc. and the Outdoor Foundation

Kayakers are the most avid paddlers, averaging 8.1 outings annually. Overall, kayaking is most popular among young adults, ages 18 to 24. Interestingly, a majority of participants in this age group — 62 percent — are female. These are national-level data to gain a sense of overall popularity. In St. Mary's County, there is no whitewater paddling (the nearest is at Great Falls, about 120 miles away).



Source: The Coleman Company Inc. and the Outdoor Foundation

In discussions with local paddleboard experts, the average age is closer to 55 for those who are currently participating in St. Mary's County. The Chesapeake Paddlers Association membership is about 60% female

paddlers, and maybe 10-15% is couples engaged in the sport. The national trends are an indication of the broader popularity of paddle sports.

Paddle Boarding

According to the Outdoor Foundation's report, stand up paddling continues to increase in popularity. In 2014, 2.8 million Americans, almost 1 percent of the population, participated in standup paddling. These participants averaged five annual outings each, making a total of 13.7 million outings last year.

The primary demographic (nearly 50%) that participates in paddle boarding are between the ages of 25-44 and have a more than \$100,000 household income.



Paddle boarding has a high percentage increase on a small base because it is a newer sport. Standup paddlers tend to cluster around marinas and towns (e.g., Annapolis) since the distances that are generally paddled on standup paddleboards are short (1-2 miles vs. 10-15 miles in a sea kayak).

Needs of Paddlers

According to Ralph Heimlich, of the Chesapeake Paddlers Association, the primary motivation for a kayaking trip is scenic waters; the second contributor is the overall experience, with a focus on the after-hours experience such as dining and nightlife. According to Heimlich, kayakers who are sporting enthusiasts are the main members of the kayaking community who can enjoy the St. Mary's County waters with the current amenities. Because of the level of knowledge and experience it takes to reach that point, Heimlich emphasized the value of adding easily accessible public soft launches near points of interest to make the destination more attractive to recreational kayakers. The proximity of the water access points to the most attractive parts of the water and the tourist attractions is too far. For example, the closest soft launch for kayakers to see Historic St. Mary's City by water is approximately 15 miles away, which is not a paddle most recreational kayakers would attempt. Heimlich added that Leonardtown has capabilities to launch kayaks, and with restaurants in close proximity, it will become a more popular place for kayakers to enjoy.

Many of the public water access points are boat ramps with shorelines bulk headed or riprapped. This forces paddlers to launch at the ramps, putting paddle boarders in competition with boaters for their use. Small amounts of funding to develop sand beach soft launches at these locations would vastly improve their appeal to paddlers, to the benefit of paddlers and boaters. Mechanical kayak launches are not recommended because they are awkward to use and damage paddle boats. If sand beaches can't be developed, simple floating docks (no more than 4-6" above the water surface) are preferred to expensive mechanical launching devices.

When the Chesapeake Paddlers Association makes summer season trips to St. Mary's County, trips typically include camping, so Point Lookout State Park is generally the destination. More paddle-in campsites would be attractive since it would expand the ability to do multi-night kayak touring, rather than car-based camping.

Attracting more paddle-based tourism from other states would be based on the availability of resorts with water access associated with marinas or other waterfront property.

Conclusion: The national trends show that paddle sports are growing in popularity. As with other water sports, the proximate lodging accommodations and amenities for multi-day trail trips must be developed. For touring paddlers, not only access but paddle-in camping sites are important, and few exist in St. Mary's County. The site at Greenwell State Park accommodates only four while most groups tour in larger number. St. Ingoes State Forest and Newtowne Neck State Park both plan campsites. These plans should be supported and fast tracked.

As mentioned above, the improvement of the water access points in closest proximity to the most desired paddle board locations is another necessary improvement. It may be necessary to develop new access points in the future. Just as with fishing parties, the lodging component is a critical component of a successful tourism plan.

Boating

Sailing

Four million people participate in sailing activities in the United States each year. Sailing activities can be broken down into six areas, according to World Sailing: fleet racing; match racing; team racing; offshore and oceanic; disabled; and bareboat chartering. According to local boating and sailing experts, sailing makes up about 10% of the total boaters who currently visit St. Mary's County.

Sailing in St. Mary's County

The County has several optimal locations for sailors including the water on the St. Mary's River leading up to Historic St. Mary's City. St. Mary's College has also been host to top regattas including the Governor's Cup. The Sailing Center Chesapeake, a nonprofit organization focused on sailing education, training, and recreation, located at Tall Timbers Marina, is working with Harvard University during the 2016 semester to bring their sailing team to train on the Potomac. The protected and flat waters along the County's rivers provide excellent opportunities to bring sailors to the area. The previous regattas and requests by Division 1 schools to practice on the County's waters is an indicator that sailing could have strong potential for future visitors.



The St. Mary's College of Maryland Sailing Department

St. Mary's College of Maryland has a nationally recognized sailing department, which creates an opportunity to leverage the benefit of sailing tournaments and regattas. JLL spoke with Adam Werblow, head coach of the sailing team, and he outlined opportunities to work with the department for future regattas or tournaments. They also host an annual alumni regatta and bring 18 teams to St. Mary's County. St. Mary's College is also host of the Governor's Cup, held July 31 and August 1. The Governor's Cup Yacht Race is the oldest and longest overnight race on the Chesapeake Bay. This year marks the 42nd running of the race from Maryland's current capital city to its first capital in St. Mary's City. Simultaneously, Potomac Leg sailors start at Dahlgren and sail to St. Mary's City.

High School Regatta

The other annual sailing event with potential is the Junior Varsity Championship Regatta.



This event, which is also an example of a youth sports opportunity, can draw 100 students with families. Sailing Center Chesapeake has overseen the event and expressed an interest in collaborating to determine how to evolve this and expand its impact.

Power Boating

According to Discover Boating, a nonprofit industry resource, boaters spent more than \$35 billion in 2014 with an estimated 171,000 new powerboats sold which is a 6.4% increase in the US. Of the current boats in the United States, 95% are less than 26 feet and can be trailered by a vehicle to local waterways.



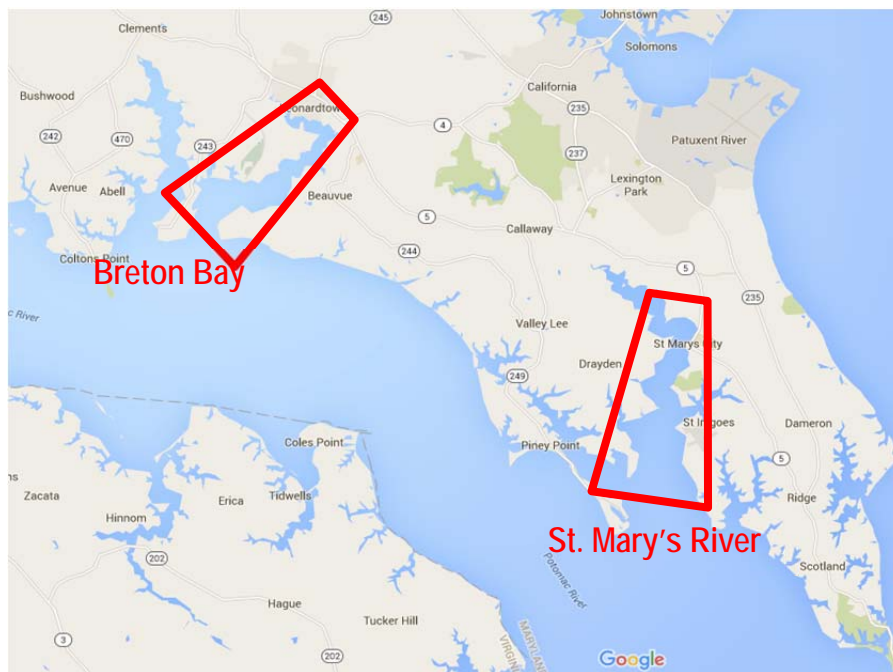
There were an estimated 940,500 pre-owned boats (powerboats, personal watercraft, and sailboats) sold in 2014, which demonstrates a high interest in the recreational activity. Boating is also primarily part of the middle-class lifestyle as 71.5% of American boat owners have a household income less than \$100,000.

Boating in St. Mary's County is accessible for visitors trailering their own boats at the following locations:

Abell's Wharf, Leonardtown
Bushwood Wharf, Bushwood
Chaptico Wharf, Maddox
Clarke's Landing, Hollywood
Forrest Landing, Hollywood
Piney Point Landing, Piney Point
St. Inigoes Landing, St. Inigoes
Tall Timbers Landing, Tall Timbers
Private Marinas

The challenge is that St. Mary's County does not have suitable marinas for boats to tie off or dock in order for boaters to spend time at restaurants or participate in other activities. Neighboring Solomon's Island is an active Marina, which indicates that there is an opportunity to increase St. Mary's County share of the boating traffic as the marinas improve. See the marinas section of this report for further discussion.

According to John Stefanik, of Chesapeake Bay Magazine, Breton Bay and St. Mary's River have the most protected and deep waters needed for boaters to access St. Mary's County's amenities. These areas are also Stefanik's recommendation for future development focus in order to create a critical mass of overnight boaters and cruising boaters. Stefanik explained that 92% of the boating community is power boaters and the number one activity for this group is dining. According to Stefanik, successful boating destinations have marinas within walking distance to restaurants and other cultural amenities. The marina acts as the "welcome mat" for boaters and provides a place to tie up and enjoy the surrounding area by foot. Stefanik noted an important trend in lodging: marinas are buying adjacent bed and breakfasts to entice smaller boaters to stay the night. This could be a potential avenue for future development in St. Mary's County. The below map indicates areas best suited for boating in St. Mary's County. Breton Bay area includes Fitzies Marina and Combs Creek Marina. Leonardtown plans to build a pier but will not have a marina. St. Mary's River does not have any marinas.



Marinas

Marinas offer water access to boaters. There are 15 marinas offering slip sales and rentals, some dock and launch sites as well as recreational rentals and fishing supplies. The health and status of the local marinas varies. Most are small operations in largely rural settings. Point Lookout Marina, Tall Timbers Marina and Dennis Point Marina have restaurant facilities and Dennis Point also features a campground.

Blackstone Marina, Hollywood
Buzz's Marina, Ridge
BluHaven Piers, Ridge
Boatel California, California
Cather Marine, Inc., Colton's Point
Cedar Cove Marina, Valley Lee
Colton's Point Marina, Colton's Point
Combs Creek Marina, Leonardtown

Curley's Point Marina, Tall Timbers
Dennis Point Marina & Campground, Drayden
Drury's Marina, Ridge
Haskell's Marina, Tall Timbers
Point Lookout Marina, Ridge
Tall Timbers Marina, Tall Timbers
Weeks Marine Railway & Marina, Hollywood

Conclusion: *The development of robust sailing activities in St. Mary's County will initially focus on trying to improve key water access points and marinas to attract multiple-day sailors. The Sailing Center Chesapeake sailing club and the nationally recognized sailing program at St. Mary's college are highly qualified, passionate partners that should be engaged in the implementation of the sailing plan. The opportunity to expand the high school regatta and other sailing regattas has the short-term potential to drive overnight stays. This could be another aspect of a focused effort on bringing youth and amateur sporting events to St. Mary's County.*

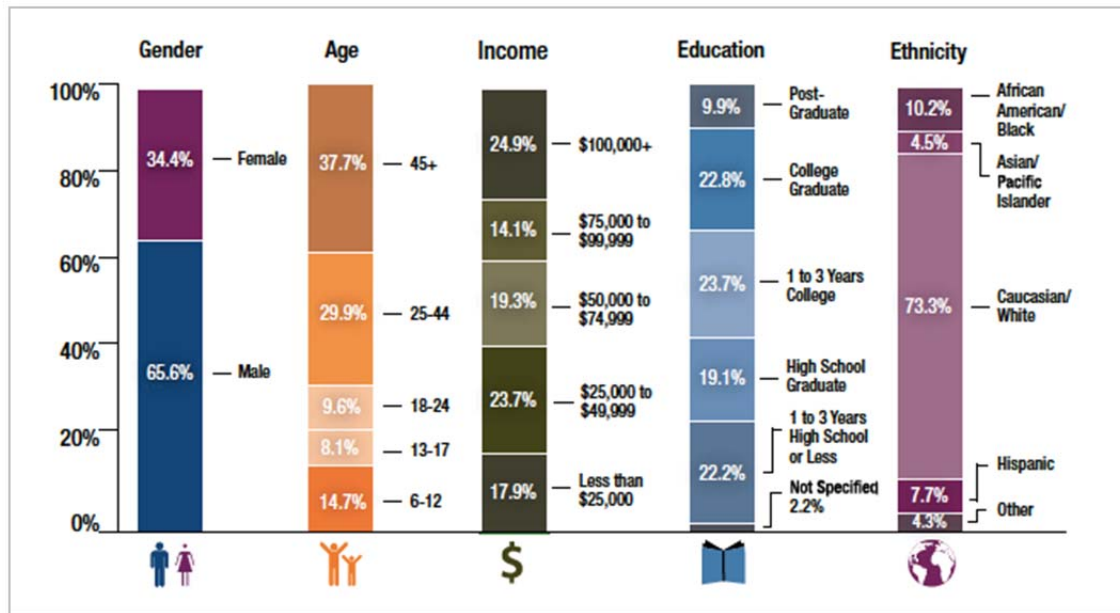
Increasing the number of power boaters visiting St. Mary's County is tied to the location and quality of local marinas. To make St. Mary's a popular boating destination will take a concerted effort. Assessing the health and needs of the County's marinas and their future role remains to be determined, and may require separate study. Once thriving along with the charter boat industry, many have seen a decline in business and attract few overnight visitors. Most are in rural locations and offer few opportunities for boaters to venture far ashore.

While Leonardtown has no plans to build a marina, it has immediate plans to build a dock for boats tie-ups with easy access from the wharf area to the downtown. Coupled with its existing paddle rental concession, boating opportunities along Breton Bay will be enhanced. It should be noted that construction of a waterfront restaurant at the Leonardtown Wharf as slated, and will be immeasurably important, as it provides the mix of boating and onshore dining attractive to boaters. The other areas noted above (St. Mary's River and Breton Bay) have been cited as having the most potential for attracting power boaters and sailors due to deep water, but there are few marinas in either area.

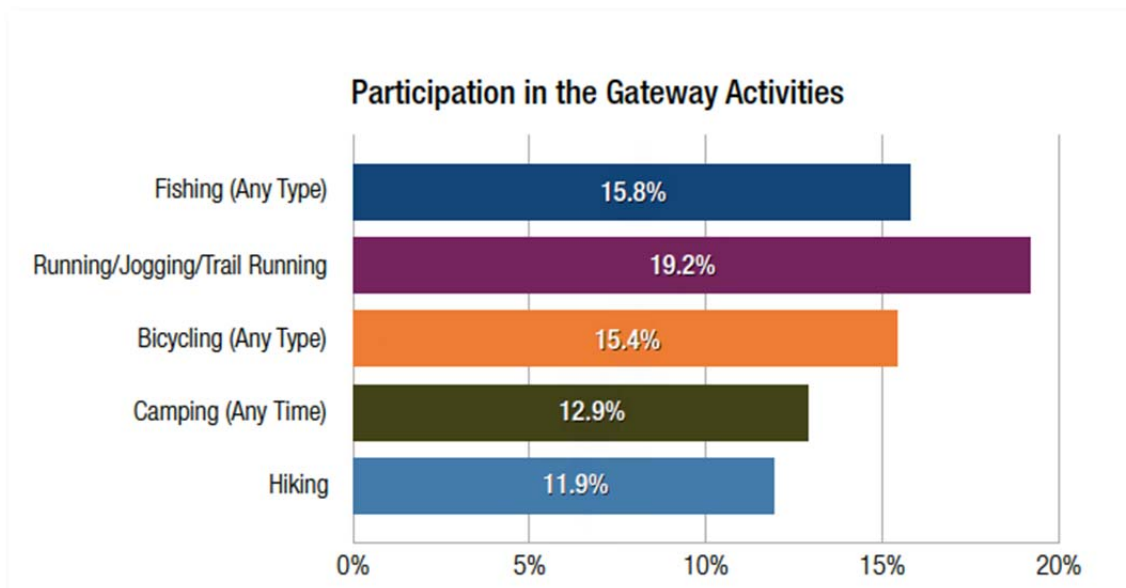
Fishing

A study by the Recreational Boating and Fishing Foundation and the Outdoor Foundation indicates that almost 16% of the U.S. population, or 46 million Americans fished in 2013. Fishing has become immensely popular for weekend recreation and is an increasingly strong demand generator for out-of-town trips. It is often the primary activity for a trip. Fishing trips are relatively spontaneous with approximately 79% of trips planned within a week according to the 2014 Special Report on Fishing. The length of travel for the average fishing participant is between 2-4 hours. Over 80% of fishermen purchase a fishing license in the state they reside.

While fishing has historically been a male-dominated sport, in 2013, 47% of those interested in fishing were female. The other new trend is the increased diversification in participation in recent years; 37% of potential fishing participants are ethnically diverse compared to the current 27% of participants. The chart below shows that 40% of fishing participants have a household income of more than \$75,000 with 25% over \$100,000. This is an indicator that this could be an important market to pursue.



Source: Recreational Boating & Fishing Foundation, Outdoor Foundation



Source: Recreational Boating & Fishing Foundation, Outdoor Foundation

Fishing as a Gateway

The 2014 report also noted the impact fishing can have on newcomers to the outdoors. Fishing is a close second to running as a "gateway" activity to the outdoors. "Gateway" activities are often favorite pastimes that extend an individual's interest and eventual participation in other outdoor activities. Those who participate in fishing are likely to do other outdoor activities — more than 77% of individuals who fish participate in other activities. This indicates an opportunity to market to a broader audience to future fishing visitors to St. Mary's County. JLL has reviewed the various types of fishing activities. The following are descriptions of these:

Types of Fishing Available in St. Mary's

Freshwater Fishing

Freshwater fishing is the most popular type of fishing by a ratio of three to one. Freshwater fishing also has the highest female and youth participation compared to other types of fishing. St. Mary's County has one freshwater fishing experience at St. Mary's River State Park.



Saltwater Fishing

The highest concentrations of saltwater fishing participants live in the South Atlantic region of the United States. They travel the most to fishing venues. More than one-third of those surveyed traveled four hours or more for saltwater fishing. This provides an opportunity to increase overnight stays. Saltwater fishing participants have the highest average income (more than \$100,000) of any other fishing group. St. Mary's County has 18 public access points for saltwater fishing and is on the Chesapeake Bay, which spawns 80% of the striped bass in the region. The striped bass influx during the six-week spawning season is a unique attribute to Southern Maryland and St Mary's County.

Fly Fishing

The western side of the Chesapeake Bay between the Potomac and Patuxent rivers can be great areas for fly fishing. Fly fishermen are predominantly male. The encouraging trend is the percentage of new participants in the last few years. St. Mary's County has some shallow flat areas best for fly fishing, but is not promoting or investing in this type of experience, according to local fishing experts.

Fishing Trips

Most fishing trips are planned within a week of a trip according to the recent study. The typical fishing party is fairly small with two to five participants. This dynamic has implications for future marketing efforts for charter boat fishing.



Charter Fishing in St. Mary's

Charter Boat fishing has a long history in St. Mary's County and once drove the economy in the southern portion of the county. Declining populations of fish in the Chesapeake Bay, an aging population of captains, a changing fishing demographic, and the Critical Area Law that makes it difficult to place amenities near the water have all contributed to this decline. Interviews with charter boat experts indicate the greatest challenge in attracting out-of-town fishing groups for charters is the lack of amenities at the key water access points, but other contributing factors warrant further study. The below list encompasses the charter boats in St. Mary's County.

Miss Flyaway, Lexington Park	Patty Lee II, Ridge
Audrey B, Tall Timbers	Fish the Bay Charters, Dameron
Ruth D, Ridge	Honey Bee, Ridge
North Star, Piney Point	Temple M, Ridge
Gerry C Charters, Lexington Park	Miss Evelyn, Drayden
Game Over, Ridge	Shannon IV, Ridge
Eva Marie, Ridge	Play Time, Ridge
Laura, Leonardtown	Marica II, Ridge
Ellen S, Ridge	Poor Boy, Valley Lee
Steven D, Ridge	Lisa Anne, Piney Point

Kayak Fishing

Kayak fishing is an increasingly popular paddle sport in the Chesapeake Bay area and St. Mary's County. Kayak anglers need the same kinds of facilities as other paddlers, but generally travel shorter distances.

Needs of Fishing Travelers – the full experience

While the demographics of fishing participants may be changing, the importance of the overall experience remains top of the list of factors driving destination choices. According to Sport Fishing Magazine, the top fishing trips across the country have the same key feature: unique, destination-specific lodging. For fishing enthusiasts, families and newcomers to the sport alike, having lodging that fits the rural, scenic charm of a destination like St. Mary's County is just as important as the fishing itself.



The Future of Fishing

The 2014 Report noted that 84% of fishing enthusiasts participated in fishing before the age of 12, making the introduction to the sport for youth critically important for developing and maintaining the market. Also, 66% have positive memories of fishing because of the outdoor experience and another 65% have positive memories because of the time the sport allows them to relax with family and friends. This further supports the initiative by the Maryland Office of Tourism to drive visitors interested in recreational activities that are focused on creating memories and spending time outdoors.

With the emphasis on quality time and experience combined with the changing demographic, St. Mary's County could compete for this type of visitor.

Conclusion: Fishing continues to be popular, and is attracting new audiences. Multi-day fishing trips that can best benefit the economy provide opportunities for fishing groups to get together and make memories. Appropriate lodging near the water access point is critical. One charter boat captain felt this was the most important factor to be addressed in attracting more fishing trips to St. Mary's County. An economic development effort to encourage investment in a lodge or resort would be required. This may be the time to think outside of the box and call for a public-private partnership to develop a small resort with a closed water system at a historic charter fishing location such as the former Scheibles Fishing Center. Understanding the reasons for the decline of the once-robust charter boat industry merits further examination.

Trails

Trails provide an exceptional way to link experiences and organize travel. Because of their ability to link experiences with amenities, trails can provide economic benefits to the communities through which they pass. Trails have proliferated across the nation, and today there is a high degree of overlap among the various federal, state and regional trail programs. Many trails combine various modes of travel such as hiking and cycling or components that may be water- and land-based. For purposes of analysis, trail systems have been divided into two subgroups: Scenic Byways and Cultural Trails, which are primarily driving experiences; and recreational trails, which are primarily land- or water-based trails for hiking or cycling. Local trail products are treated within the appropriate asset sections of this report.

Scenic Byways and Cultural Trails

Industry Data

From an economic impact perspective, consumers who seek out byways-type travel, classified as touring travelers, spend more per trip than the average Maryland overnight trip. Touring travelers spend 59% more per trip than average overnight travelers (\$858 versus \$541), according to a study conducted by Longwoods International. Touring travelers stay in paid accommodations at a much higher rate than the general overnight traveler, increasing the tax base when they travel to Maryland. Eighty-nine percent of touring travelers stay in a hotel, motel, or resort hotel during their overnight trip, compared to 51% of all overnight travelers. "From an economic development perspective, it would behoove us to ensure that this product remains attractive to these consumers," according to the Maryland Scenic Byways Strategic Plan.

Federal and State Partnership Trails

The state of Maryland has a network of 18 scenic byways encompassing over 2,221 miles. The State Highways Administration (SHA) administers the program and works closely with the Office of Tourism Development (OTD) and other state agencies. SHA has a strategic plan to guide development, management and funding of the byways program. Maryland's Scenic Byway program helps the communities along these routes enhance the quality of life and pride in their communities, as well as improve the visitor appeal by identifying, promoting, and encouraging the responsible management and preservation of the state's most scenic, cultural, and historic roads and surrounding resources. OTD is placing increasing emphasis on the byways as a way to link experiences. St. Mary's County is included in three byways.

Scenic Byways in St. Mary's County

The Religious Freedom National Scenic Byway

The Religious Freedom National Scenic Byway (RFNSB), runs through St. Mary's and Charles counties and is the only national byway within St. Mary's County (Maryland includes national byways in its byways program). The Religious Freedom National Scenic Byway is 195 miles and is approximately a 5-hour tour from start to finish. The RFNSB incorporates many of the nation's oldest churches, the site of the first Roman Catholic Mass held in English-speaking America and Maryland's colonial capital, Historic St. Mary's City. The byway has two anchor sites (Historic St. Mary's City and St. Clement's Island Museum in St. Mary's County), and 14 additional sites with limited hours and/or passive interpretive markers.



Maryland Civil War Trail: Booth's Escape

The Maryland Civil War Trails Program is part of a five-state network and has four trails including "Booth's Escape" which runs through Prince George's and Charles counties. Although the trail does not run through St. Mary's County, the trail map includes the following six sites, each with an interpretive wayside marker: Chaptico, St. Clement's Island Museum, Piney Point Lighthouse Museum, Point Lookout State Park, Leonardtown, and Sotterley Plantation.



Star Spangled Banner National Historic Trail (SSBNHT)

The SSBNHT includes sites in St. Mary's County. As with the RFNSB, the SSBNHT pulls-in recreational and cultural assets into the visitor's War of 1812 experience. The trail has both land and water components. Major St. Mary's County War of 1812 assets are Sotterley Plantation and Christ Church in Chaptico. The water trail is linked to the Chesapeake Gateways water trail system's Captain John Smith Chesapeake National Historic Trail.



Piscataway Trail Project

Now in development, the project will provide educational and interpretive opportunities regarding Piscataway culture in southern Maryland as seen through Piscataway eyes. The trail is being developed in partnership with the Southern

Maryland Heritage Area Consortium, the National Park Service Chesapeake Office, the Maryland Office of Tourism, Maryland Historical Trust, and St. Mary's College of Maryland. The Trail will be designed to engage a wide range of visitors, protect the sites and landscapes significant to understanding Piscataway culture, and provide opportunities for new land- and water-based heritage tourism and recreation.

Recreational Trails (hiking and cycling)

Captain John Smith Chesapeake National Historic Trail (water)

The water trail of the Captain John Smith Chesapeake National Historic Trail touches St. Mary's County on both the Patuxent and Potomac rivers. The Captain John Smith Trail has interpretative buoys, marinas, Chesapeake Bay gateway sites and public landings along the trail. St. Mary's County has one interpretative buoy on the Trail at Point Lookout State Park.

Potomac Heritage National Scenic Trail

St. Mary's County is also home to sections of the Potomac Heritage National Scenic Trail, operated by the National Park Service, which can be explored both on land and water. The Trail follows the paths explored by George Washington and links the Potomac to the upper Ohio River basins.



Challenges and Opportunities

When viewed in conjunction with the recreational trails, there is a plethora of overlapping products, which share many of the same historic, cultural and recreational resources. In recognition of this situation, a Common Interpretive Strategy was developed in 2014 to provide a foundation for collaborative interpretive efforts to interpret four intertwined routes in Charles and St. Mary's counties: Religious Freedom National Scenic Byway, Potomac Heritage National Scenic Trail, Captain John Smith Chesapeake National Historic Trail, and the Star-Spangled Banner National Historic Trail. The addition of the Piscataway Trail makes the situation more challenging for planners and for the traveling public. All the Byways programs require substantial management at the local level, as well as significant commitments of anchor sites and the Department of Recreation and Parks, which manages water access points, to integrate these programs into their programs and ensure the necessary allocation of resources.

Additional Trails

St. Mary's County Historic Rural Roads

The St. Mary's County Historic Preservation Commission and the Department of Land Use and Growth Management, catalogued seven rural roads that are part of the transportation history of the County and produced a booklet and map entitled "Historic Rural Roads in St. Mary's County." The booklet is distributed locally and at regional visitor centers. The booklet could serve as the basis for a driving itinerary to include sites and amenities to be encountered along the way. In effect, this could be a "local" version of the byways discussed above.

Southern Maryland Trails: Earth, Art, Imagination

Produced by the Southern Maryland Agricultural Division, the enterprise features a trail in each of the three Southern Maryland counties, which knits together farms, galleries, dining spots, and places to stay. The Trails exist in print and digital format, and the



enterprise is a remarkable core asset that establishes the region as an artistic haven and provides a framework by which road-trippers can navigate each county. It has also served as a catalyst for growth and engendered a sense of community among artists.

Conclusion: Recognizing that most visitors to Maryland travel in private vehicles, the Maryland Office of Tourism is placing increased emphasis on its Byways. Byways offer an opportunity to link experiences with amenities to bring economic impact to communities.

When viewed in conjunction with the recreational trails, there is a plethora of overlapping trail experiences, which share many of the same historic, cultural and recreational resources. In recognition of this situation, a Common Interpretive Strategy was developed in 2014 to provide a foundation for collaborative interpretive efforts to interpret four intertwined routes in Charles and St. Mary's: Religious Freedom National Scenic Byway, Potomac Heritage National Scenic Trail, Captain John Smith Chesapeake National Historic Trail, and the Star-Spangled Banner National Historic Trail. This initiative should be fully supported.

The Piscataway Trail is now under development and will link sites and experiences in Prince George's, Calvert, Charles and St. Mary's counties with interpretation from a Native American perspective. The trail offers an exciting opportunity to reach new audiences. The master plan should be sure to account for this project.

Outdoor Activities

Walking and Hiking Resources

The five state parks and the major historic sites in St. Mary's County offer walking trails. These present opportunities to expand the visitor experience by combining culture with nature. St. Mary's County offers one major standalone trail: The Three Notch Trail.



Three Notch Trail

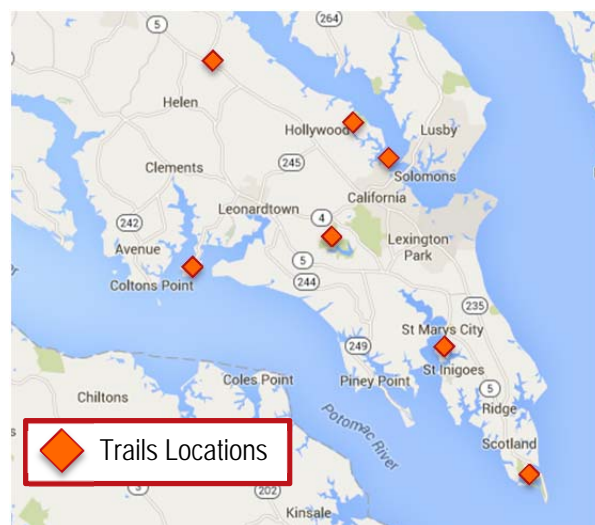
St. Mary's County Department of Recreation and Parks is in the process of constructing a local pedestrian and cycling trail that will extend approximately 28 miles. Three Notch Trail is currently 11 miles long with sections in the northern part of the county. The trail is being constructed of asphalt and will be 10 feet wide in most sections. Interpretive signage and benches enhance the trail.

Although Three Notch Trail features interpretive markers, it primarily serves the local community, not visitors. Once completed and it provides a way to traverse much of the county, that will likely change. In the long term, a planning effort among Charles and Prince George's counties to complete a tri-county portion of the Potomac Heritage Trail starting at Point Lookout and linking to the Three Notch Trail, then linking to trails in the other two counties, could be a visitor draw for the entire region.

Other Local Trails

In addition to the Three Notch Trail, St. Mary's County's state parks and several of its historic sites offer trail experiences. Hiking, cycling and walking trails in St. Mary's County include:

- Greenwell State Park, Hollywood
- Historic St. Mary's City, St. Mary's City
- Myrtle Point Park, California
- Newtowne Neck State Park, Compton
- Point Lookout State Park, Scotland
- Sottlerley Plantation, Hollywood
- St. Mary's River State Park, Callaway



Hiking

Hiking is one of the most popular outdoor activities. The annual participation cited in a 2014 report by the Outdoor Foundation showed over 34 million people in the United States participate in hiking. The same study showed positive growth over the past five years. Nationwide, hiking has the fifth largest participation rate with 12% and is favored behind running, cycling, fishing, and camping.

The challenge with multiple-day hikers is they do not have a high propensity to stay in hotels. The trails are the main pedestrian hiker experiences in St. Mary's County. Studies show that a prime motivator for hikers is to get away from the daily stress and spend time with family and friends. While day hiking is a popular activity, it is most likely a supplemental activity to a visitor planning a trip to St. Mary's County. With that in mind, there is an opportunity to develop specific content for hikers.

Recreational and Competitive Cycling

Cycling, or biking, is a popular leisure activity but also a means of transportation. Depending on the source, between 42 million and 51 million people rode a bike in the past 12 months in the United States, and 4.36 million young adults participated in bicycling in 2012 compared to 2.8 million in 2006. According to the Outdoor Foundation Cyclers spend more than \$46.9 billion in bicycling trip related expenditures. The Outdoor Foundation's Active Outdoor Recreation Economy annual report from 2006 cites \$11.3 billion in economic contribution from bicycling in the South Atlantic region. This report indicated a strong potential for growth in rural communities similar to St. Mary's County.

Needs of bicycle travelers

The self-sufficiency and budgets of cycling travelers varies, making a diverse hotel product important. Additional amenities important to bicycle travelers are access to showers if camping, and access to a laundromat and safe storage for their bicycle.

Bicycle travelers appreciate the journey. This presents a further opportunity for St. Mary's County as bicycle travelers enjoy scenic routes and destinations.

"Cycling tourism in rural areas should be part of a larger context and should include points of interest, community festivals, and historic infrastructure."

— Adventure Cycling Association, 2012

Importance of Infrastructure

The Adventure Cycling Association cites the importance of infrastructure for bicycle tourism and notes the above needs are staples for travelers. Communities attempting to establish themselves as "bike-friendly" should strive to create infrastructure and amenities that would support multi-day experiences for bicycle travelers. For example, Farmington, MO, which is located on the Adventure Cycle Association's TransAmerica Route "has made a number of deliberate accommodations for cyclists who travel through the community, including the conversion of a historic jailhouse to a cyclist-only hostel and the installation of way-finding signage specifically for cyclists," according to the Adventure Cycling Association Sally Broadway Master Report.

St. Mary's County Cycling Opportunities

The County's relatively flat terrain, and wide-shouldered roads make it attractive to cyclists. Hilly areas in the central and western part of the county add interest. The regional cycling club, Pax Velo, assisted SMCT in mapping several routes that incorporate points of interest and appeal to riders of varying levels of competency. Cycling routes are also posted on the Potomac Heritage Trail website. "Map my Ride" itineraries on the SMCT website allow cyclists to sync routes to their GPS systems.

7th District Loop

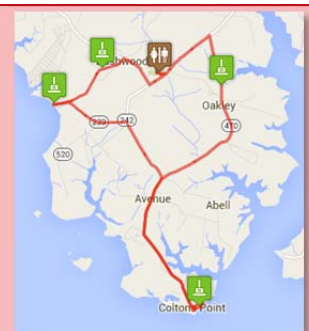
Distance – 18.8 miles with 311 feet of climbing

Description – Cycle through early Maryland history. This ride takes you to the Potomac River site of Maryland's founding and along beautiful, lightly traveled country roads.

Level – Relatively easy. Other than the start and finish, this course is very flat.

Parking – Yes

Bathrooms – Yes



Chapitco Loop

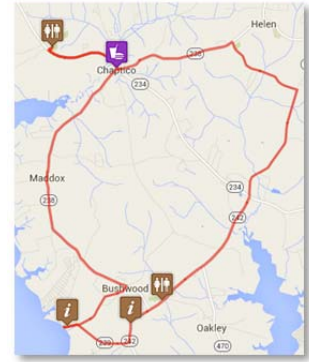
Distance – 25.5 miles with 803 feet of climbing

Description - Take in War of 1812 and Civil War history, cycle past tobacco barns and historic churches. These roads are lightly traveled or have buggy-wide shoulders.

Level - Requires a moderate level of fitness, as there are a few small climbs. and some roads are either lightly traveled, or have buggy-wide shoulders.

Parking – Yes

Bathrooms – yes (Chapitco Park – seasonal operation)



Amish and Mennonite Loop

Distance - 14.5 miles with 542 feet of climbing

Description – Ride through beautiful Amish & Mennonite country, with some time on the Three Notch Trail (railroad right-of-way converted into paved bike path). This ride runs through the heart of St. Mary's and along back roads only the locals (and devoted cyclists) know. Encounter rolling roads and slow-moving buggies.

Level – moderate with some small climbs

Parking – yes

Bathrooms – yes



St. Mary's City Loop

Distance – 9.7 miles with 214 feet of climbing

Description - Loop travels through beautiful countryside to historic St Mary's City, first capital of Maryland, and campus of St Mary's College of Maryland. The loop may be short but the history is deep. Take your time and travel across the peninsula on Mattapani Road, the oldest road in Maryland.

Level – easy

Parking – yes

Bathrooms – yes



Three Notch Trail

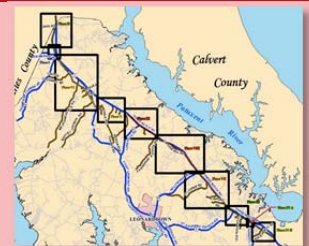
Distance – currently 11 miles, 28 miles upon completion of all phases

Description - The Three Notch Trail is a non-motorized pedestrian and bicycle trail being constructed on the St. Mary's County railroad right-of-way. The trail is constructed of asphalt and is 10 feet wide in most sections, with 2 – 3 ft. grass shoulders.

Level – easy

Parking – yes

Bathrooms – yes



Competitive Racing in St. Mary's County

Pax Velo sponsors the annual St. Mary's Century (formerly the Amish Hundred). Now in its sixth year, the race attracts approximately 300 racers from throughout the region and offers routes of various distances. Pax Velo varies the race course each year with the objective of creating courses that offer a variety of levels of difficulty, are scenically beautiful and have quality rest stops at interesting locations.

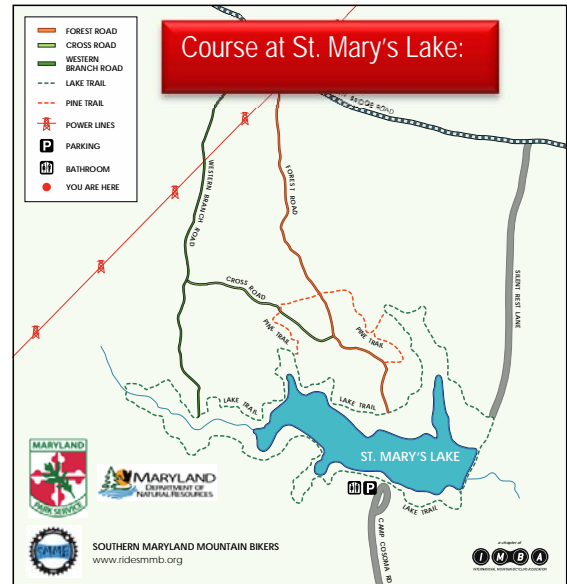
Until recently, the club hosted the Leonardtown Criterium with an in-town course that attracted race clubs from throughout the region. However, town officials decided to curtail the race due to opposition by a segment of town businesses and a series of damages caused by vandalism.

Mountain Biking in St. Mary's County

The national research on mountain biking and tourism indicates that mountain bikers primarily travel within a driving region, with a commanding 97% of mountain biking related travel being by car, according to Singletrack's Mountain Bike Tourism 2015 study. The same study stated that 48% of meals eaten during mountain biking trips are in restaurants.

St. Mary's County has one significant mountain bike path that encircles the lake at St. Mary's River State Park. While the course does not offer enough to attract serious mountain biking aficionados, it could be marketed to weekend warriors for its mix of paddling and onroad cycling opportunities.

Tre Johnson, with Southern Maryland Mountain Bikers, is a mountain biker and advocate for improving the mountain biking experience in St. Mary's County and the local chapter leader for the International Mountain Bicycling Association. He indicated the regional organization is pressing DNR for improvements and expansion of mountain bike paths at St. Mary's River State Park. With such improvements, he believes St. Mary's County would have a mountain bike course that could attract out-of-town mountain bikers.



Conclusion: *Cycling is an activity with great potential to attract overnight visitors to St. Mary's County. The path to developing the County as a destination for runners is through competitive events that increase awareness and introduce cyclists to the scenic beauty and quality of the cycling experience offered here.*

The benchmarking study of Dorchester County provides such an example. There, cycling has become a significant room night generator, based on leveraging a nationally recognized Iron Man event. An expert consulted with DED and SMCT several years ago about developing or attracting a high-profile race and did not believe the area had the mix of amenities, nor capacity in terms of parking and staging to pursue such an event. However, this approach may merit revisiting.

Pax Velo has been a strong tourism partner and should be enlisted in any further discussions regarding growing cycling in St. Mary's County.

Competitive Running

According to the recent article, marathons are becoming more popular as destination drivers. They can have a significant economic impact. If scheduled effectively, they can increase the number of booked room nights. Nearly 2 million runners complete half marathons each year. In addition, 43% of marathon finishers are female.

Destinations are developing experiences to entice runners to stay overnight. For example, the Westin in 15 Rock 'n' Roll markets across the country and offers a VIP Marathon Package that includes a complimentary pre-race dinner for two, a concierge-led shake out run, and late checkout on race day.

Recreational Running in St. Mary's County

St. Mary's County offers rural roads with shoulders through scenic landscapes, which is ideal for recreational runners. It has a strong community of local runners and a supportive regional club: The Chesapeake Bay Running Club. Numerous local fundraising runs, such as the 5K Run for Hospice, contribute to the continued growth of the local running community.

Competitive Running in St. Mary's County

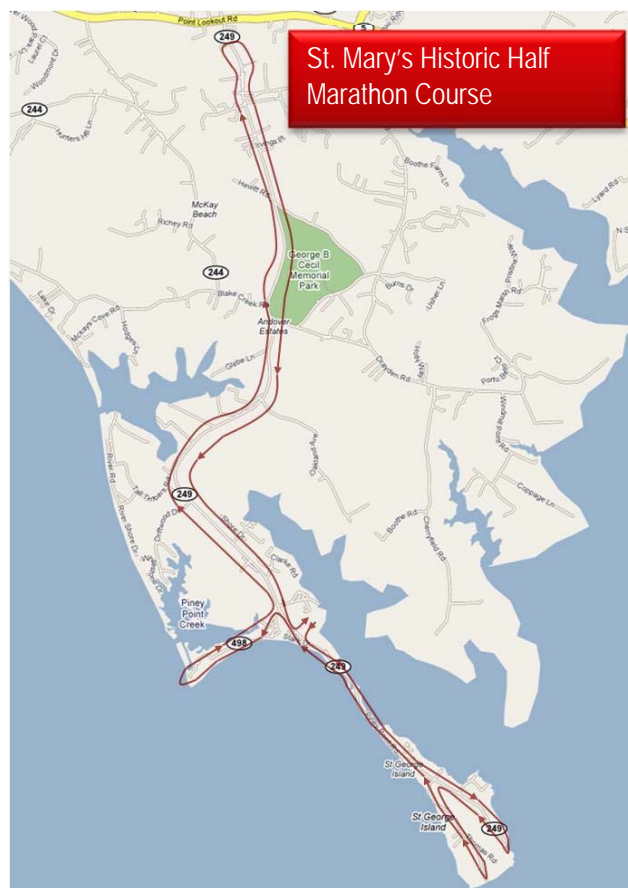
The Chesapeake Bay Running Club hosts the Lower Potomac River Marathon on St. George Island, and a Trail Run Series of five runs, which includes St. Mary's County. The race is limited to 200 competitors to ensure a high-quality experience.

Comments from runners such as this affirm the importance of location to race competitors: "I live in Ottawa, Ontario and drove 13 hours to do this race. It is well worth the drive. It is a couple of hours south east of Baltimore and the scenery is amazing. Driving up bridge to Piney Point was a real treat."

The St. Mary's Historic Half Marathon hosted by St. Mary's College had its inaugural run in May 2016.

Competitive runner Liza Recto, who organizes the Lower Potomac race and is leader in the race community, noted that St. Mary's County is cyclist- and runner-friendly, with many good races. Qualifiers for national races draw a substantial participation. In addition to the youth sports market, consider "master" athletes — those 30 and older who are sometimes former Olympians — who are still competing in various sports and sporting events.

Conclusion: Running and competitive running are a gateway to developing the county as a running destination, and shares much in common with cycling. The current races attract regional runners who come to St. Mary's County to participate and drive home without spending the night. Whether these races can be grown to attract a broader audience and formatted to encourage overnight stays will depend on many things such as infrastructure, the capacity of the organizing body, and the sponsorship pool. Perhaps of greater interest than overnight stays during races is the potential to develop the County's reputation as a great place to run and to do so in combination with other outdoor weekend activities.



Birding and Hunting

Birding

Birding has grown in popularity over the past five years with increased participation in most age groups.



Birding at Point Lookout State Park

- ✓ **47 million:** Number of birders, age 16 years and older, in the United States as of 2011.
- ✓ **38:** Percentage of away-from-home birders, or those who travel more than a mile from home to bird watch on private and public lands.
- ✓ **53:** Average age of a birder in the United States in 2011.
- ✓ **110:** Average number of days spent birding in 2011.
- ✓ **\$15 billion:** Estimated trip-related expenditures for birders in 2011.

Source: National Survey of Fishing, Hunting, and Wildlife Associated Recreation, 2011.

Areas cited by the Southern Maryland Audubon Society for birding in St. Mary's County are:

Point Lookout State Park, Scotland — With proper weather conditions, this site is a migrant concentration point, especially in autumn. Look for shorebirds, raptors, and songbirds. Cormorants are often in view during the winter months after late November. At low tide, the sand bar at Tanner's Creek can have a variety of in-season shorebirds or terns. Brown-headed nuthatches nest in the park and can be found near the visitor center or in the campgrounds.

St. Mary's River State Park, Callaway — Forest birds and freshwater shoreline birds can be spotted via foot trails and the canoe/kayak launch. This area often gets red-headed woodpeckers, tree swallow, hooded and Kentucky warblers, and other forest interior dwelling species, such as thrushes, during migration.

Historic Saint Mary's City, St. Mary's City — Good for open country, forest, and tidal shoreline birding.

Elms Public Beach, Lexington Park — Good for edge, pine forest/shrub, marsh, beach, and bay front birding.

Piney Point Lighthouse, Piney Point — Good viewing of waterfowl in the winter and nesting Ospreys and other summer water birds (gulls and terns).

Myrtle Point, California — Nesting area for yellow-breasted chats, prairie warblers, and white-eyed vireos.

Sotterley Plantation, Hollywood — Good for open country birds.

A list of the top 250 birding locations in the United States and Canada by Thyer Birding listed only four locations in Maryland — none of which were in St. Mary's County, which indicates St. Mary's County would benefit from better defining its birding experience.

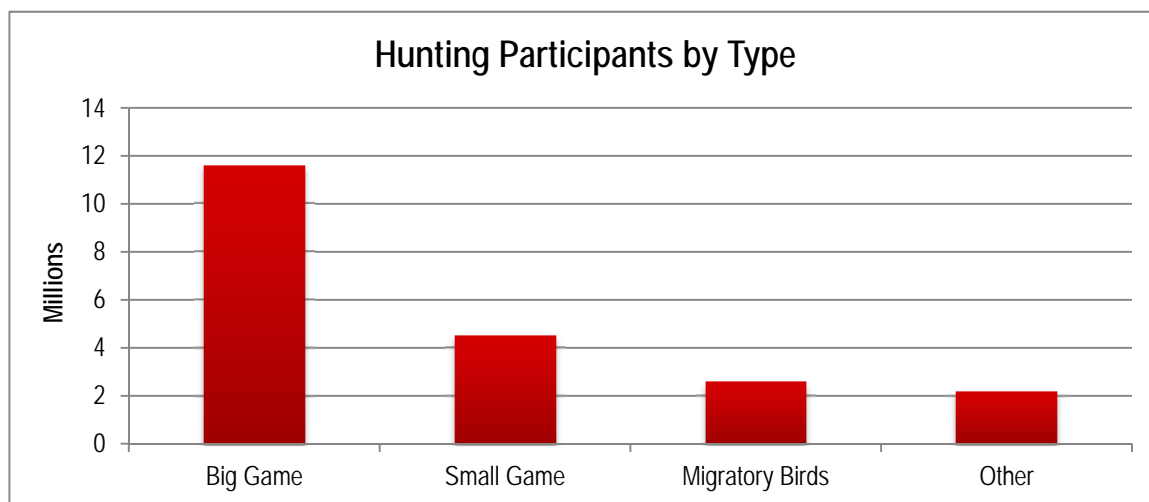
Of particular note is McIntosh Run, a unique “in-town” water trail that starts at the north edge of town, then meanders through three ecosystems including woodland forested interior dwelling (FID) bird habitat, through tidal marshland, and then along Breton Bay to the town’s Wharf Park. It presents significant opportunities for birding.

Sotterley Plantation has produced a guide for onsite birders.

***Conclusion:** Birding is an activity that may have great potential for St. Mary’s County. The breadth of species and the overall rural environment is consistent with the interest of birders. To make an impact in this market, the birding experience should be more clearly defined. A collaborative partnership with the Southern Maryland Audubon Society or the Maryland Ornithological Society to further detail the birding experiences in St. Mary’s County could prove fruitful. As with other activities, offering lodging attractive to this higher-income visitor will be an important factor.*

Hunting

The 2011 National Survey of Fishing, Hunting and Wildlife Associated Recreation conducted by the U.S. Fish and Wildlife Service and the Wildlife and Sport Fish Restoration Program (this study is produced every five years) reports that 13.7 million hunters took to the field in 2011. The most popular hunting is for “big game” animals. Hunting participants typically participate in more than one kind of hunting; 11.6 million participants hunted big game, 4.5 million hunted small game, 2.6 million hunted migratory birds, and 2.2 million hunted other animals.



Hunters spend nearly \$40 billion annually across the United States in tourism expenditures. St. Mary’s County has unique attributes that could attract this type of visitor in the future.

Big Game Hunting

St. Mary’s County qualifies for big game hunting with the native white tail deer population. The top areas for big game hunting in St. Mary’s County are Newtowne Neck State Park and Elms Beach Park. Big game hunters have a high propensity to travel, and St. Mary’s County has some of the highest quality deer in the region.

Small Game Hunting

According to stakeholders, St. Mary’s County does not have a premier product for small game hunting. Small game, which is popular, includes rabbits, squirrels, pheasants, quail, and grouse.

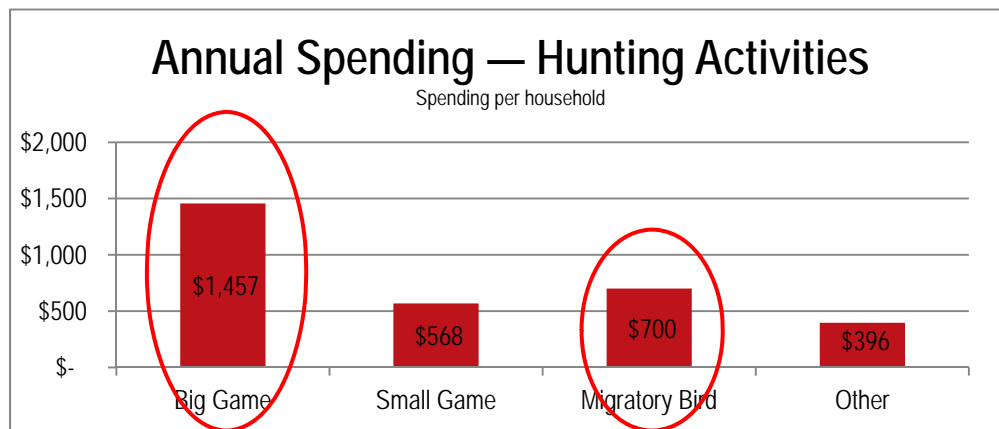
Migratory Bird Hunting

Migratory Bird Hunting accounts for 23 million total days a year of hunting birds including doves, ducks and geese, and a total \$316 million spent on food and lodging during these trips. Each migratory bird hunter averaged nine days of hunting per year. The opportunities for migratory bird hunting in St. Mary's County include the state parks and county-designated areas. There is also potential to work with landowners to develop hunting on private lands.

Hunting Other Animals

Nearly 2.2 million hunters a year reported spending 34 million combined days on 25 million trips pursuing other animals such as groundhogs, feral pigs, raccoons, foxes, and coyotes. They averaged 16 days of hunting each year and spent a combined \$858 million in 2011 on trips and equipment in pursuit of the animals. Trip-related costs totaled \$653 million. Of that, food and lodging was \$259 million or 40 percent of all trip costs; transportation was \$324 million, 50 percent of trip expenses; and other trip expenses were \$70 million, 11 percent of all trip costs. Equipment expenditures for hunting other animals totaled \$205 million. In pursuit of other animals, hunters spent \$189 million on hunting equipment (such as firearms and ammunition) and \$6 million on auxiliary equipment.

Based on stakeholder conversations and JLL's research, the top two hunting types are big game and migratory bird.



Challenge for Hunting & Tourism in St. Mary's County

While St. Mary's County has high-quality big game in the white tail deer and the large tracts of public lands available for hunting, most visitors likely want a guided experience. Guiding on public lands is illegal in the state of Maryland, which makes it more difficult to package, promote, and sell this experience.

Outfitters need agreements with private landowners to guide hunts for visitors. Moreover, local clubs and groups are able to lease private lands for themselves and are not necessarily open to the idea of promoting hunting as a tourism asset. There is a potential opportunity to develop a coordinated approach to managing some of the St. Mary's County private land to accommodate outfitters. Outfitters are businesses that supply items needed for hunting as well as trained guides for hunting groups.

Opportunities for Hunting in St. Mary's County

Similar to fishing, participants are interested the overall experience as well as the specific activity. Like fishing, hunting offers opportunities for bonding and traditions. With the Maryland Office of Tourism's recent push into the hunting market, developing programs that appeal to hunters may merit consideration.

Hunting locations in St. Mary's County

Elm's Beach Park, Lexington Park
Greenwell State Park and Foundation, Hollywood
Myrtle Point Park, California
Newtowne Neck State Park, Compton
Point Lookout State Park, Scotland
St. Clement's Island State Park, Colton's Point
St. Inigoes State Forest, St. Inigoes
St. Mary's River State Park, Callaway

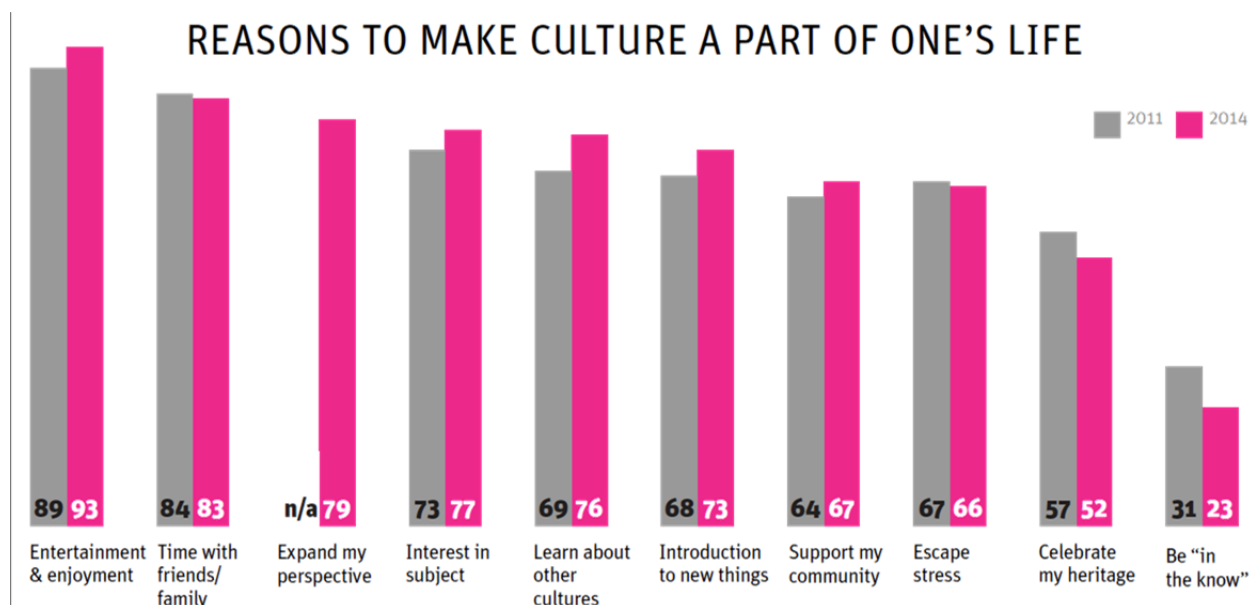
Conclusion: National statistics demonstrate a continued, strong interest in hunting. Whether St. Mary's County is able to develop a hunting experience remains in question. The inability to offer guided hunting experiences on public lands and the lack of suitable amenities are key challenges. Hunting may be a long-term initiative as the experience will further development when coupled with new lodging opportunities.

Museums and Historic Sites

St. Mary's County's museums and historic sites are, along with outdoor activities, the main reason visitors travel to the County. Together, the museums and sites detail the majority of the County's history and heritage.

Nationally, there has been a decline in historic museum attendance, which is linked to the perception that historic museums are not "engaging," as discussed in the 2014 Culture Track study. This study focused exclusively on the attitudes, motivators, and barriers of culturally active audiences. Museums have met this challenge by increasing living history offerings.

The following graph from the 2014 national Culture Track study shows how attitudes toward cultural activities focus more on the entertainment value and spending time with friends and family than on the interest in the subject.



Source: Culture Track, 2014 LaPlaca Cohen

This study continues to reinforce the importance of "entertainment and enjoyment" as a key motivator for visitation and participation in cultural activities. With its many historic resources and interesting stories, St. Mary's County's sites could benefit by deeply embracing an "active engagement" approach to the visitor experience.

Museums and Historic Sites in St. Mary's County

St. Mary's County is the birthplace of Maryland. Sites include the island where Maryland was founded, its first settlement, and first capital. Significant stories and events relate to early practices of religious toleration, tobacco and slave culture, the War of 1812, and the Civil War. Chesapeake Bay maritime heritage and present-day U.S. Naval Aviation activities also inform the character of the County. St. Mary's County has six historic sites and museums with a full range of visitor programs, numerous smaller sites open on a seasonal basis or with limited interpretation, several lighthouses, and a wealth of colonial churches.

Contrary to the national trends, the St. Mary's County Museum Division — which operates St. Clement's Island Museum, Piney Point Lighthouse Museum and Historic Park, and Drayden African American Schoolhouse — has enjoyed a general increase in visitation over the past five years. The only exception was in 2015, when staff resources and inclement weather affected overall attendance. The museum division agrees that "active engagement" and visitor-staff interaction of some style (talks, tours, demonstrations and other forms of presentation or hands-on activity) enhances the visitor experience.

Historic St. Mary's City, St. Mary's City

Historic St. Mary's City identifies itself as an "outdoor museum of living history and archaeology." It contains more than 800 acres of woodlands, fields and shoreline with numerous historic buildings and a large amount of waterfront property. The site, which tells the story of Maryland's first colony and first capital, operates year round, with the prime season of March-November. Interpretive sites, many built upon archaeological foundations, include:

1. Maryland Dove
2. Town Center
3. Woodland Indian Hamlet
4. Godiah Spray Tobacco Plantation
5. First Catholic Church

A self-guided audio tour has been developed to enhance the overall experience at Historic St. Mary's City. In addition, at designated times there are opportunities for visitors to do hands-on activities that reflect the approach used in the early 1700s.

A primary focus of Historic St. Mary's City is education. A visit is part of the curriculum for fourth grade in Maryland schools. This brings approximately 20,000 school children to the city annually.

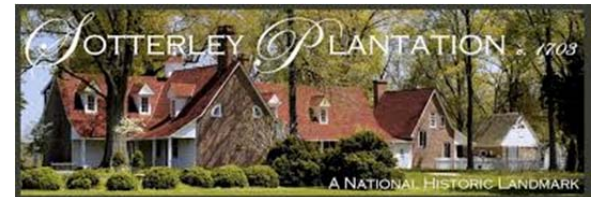
Current annual paid attendance is approximately 10,000 with total attendance in 2015 of 33,651.



HISTORIC
ST. MARY'S CITY

Sotterley Plantation, Hollywood

The history of the Sotterley Plantation dates back to the early 1700s. It is the only remaining Tidewater Plantation in Maryland that is open to the public. Buildings include the 1703 Plantation House, a rare restored slave cabin and other outbuildings. The expansive grounds border the Patuxent River and include gardens, open fields and woodlands. Sotterley offers guided tours of the Manor House and other topics. It provides educational programs and produces special events.



The mission of Sotterley Plantation is to preserve, research, and interpret Sotterley Plantation's diverse cultures and environments and function as an educational, cultural, and community resource.

Current annual paid visitation is 27,063.

St. Clement's Island & Museum, Coltons Point

St. Clement's Island State Park is located in the southern Potomac River between the Wicomico River and St. Clements Bay. The island is said to be the first landing site and short-term refuge of the Maryland colonists as they sought permissions for a permanent settlement site from the Piscataway Indians. The state park supports walking trails with interpretive signage; a full scale replica of the Blackstone Lighthouse; boating piers; picnic; and composting restroom facilities. Programs and tours are available on a seasonal basis or by appointment. The 2015 visitor attendance was 6,948.



St. Clement's Island Museum is a county-operated park and museum on the Maryland shore of the Potomac River within view of St. Clement's Island. The museum offers exhibits and interpretive

programming that illustrate the history of St. Clement's Island, the Potomac River, and lesser known elements of St. Mary's County history. The museum grounds offer picnic facilities, a one-room schoolhouse and a St. Mary's County dory boat exhibit and public boating pier. Programs, tours, and special events are offered March through December on seasonal schedules, or by appointment. A water taxi service from the museum pier to St. Clement's Island is seasonally offered. The 2015 visitor attendance was 21,276.

Piney Point Lighthouse & Historic Park, Piney Point

Piney Point Lighthouse, Museum and Historic Park is a county-owned and operated park, museum, and historic site on the Potomac River in Piney Point, MD. The recently restored 1836 lighthouse and keeper's quarters are the focal point for visitors from all over the world. The museum exhibits feature the lighthouse, WWII Navy torpedo testing, the Coast Guard presence and Potomac River and Chesapeake Bay maritime history as it pertains to the site and region. A U-1105 submarine that sunk in the Potomac River near the park is recognized as Maryland's first underwater preserve and is interpreted through an exhibit and site signage. The park supports a picnic area, boardwalks, pier, kayak launch, interpretive signage, and examples of bay wise and storm water management features. Programs, tours, and special events are offered March 25 through December on seasonal schedules, or by appointment. The 2015 visitor attendance was 21,508.



Patuxent River Naval Air Museum, Lexington Park

The multimillion-dollar construction and renovation project could position the museum as the highest profile attraction in St. Mary's County. The overall focus is on research, development, testing and evaluation. The museum will have interactive opportunities with simulators and 22 new one-of-a-kind aircraft that will be accessible to the public. This increased interactivity will greatly enhance the overall experience.

Ongoing plans include renovating the current buildings and adding a Flight Academy and a Children's Discovery Zone. There is also a plan to acquire nearby parking for visitors and tour buses. The museum is committed to developing new exhibits and experiences in an effort to stay relevant attract visitors.



The museum is operated by the Patuxent River Naval Air Museum Association and there is currently no paid museum staff. Annual attendance for the museum averaged 68,896 attendees over the past three years.

Point Lookout - Civil War Museum, Point Lookout

Co-located with the Nature Center in the overnight camping section of the Point Lookout State Park, the museum has seasonal and limited hours of operation. Park staff cares for the exhibits, but there is no professional museum staff. The civil war museum tells the story of Point Lookout at the time when it was a Civil War hospital and Confederate Prisoner Camp. This is done with static displays and artifacts and is primarily a self-guided site. The surrounding environs, including the park's reconstructed Fort Lincoln and several monuments to the Confederate Soldier, including an interment site, extend the story.

The annual attendance at the museum was not available; however, the attendance to the Point Lookout State Park was 128,423 in FY2015.

Old Jail Museum, Leonardtown

Built in 1858 and in use until 1942, the granite block and brick structure retains its original upstairs cells where prisoners were once segregated by gender and race. The jail keeper's quarters downstairs house artifacts that relate county history. The museum also serves as a county visitor information center although its hours limit how useful it is as an information center. Special tours and hours are available by advanced arrangement.

The museum is one of only two historic sites in Leonardtown, the other being Tudor Hall. The building is owned by the County and leased to the St. Mary's County Historical Society, which staffs the museum with volunteers. The granite block and brick structure once housed prisoners and the jail keeper's quarters. The museum is primarily self-guided; guided tours are available upon reservation. The museum is currently open three days a week, four hours a day. There is also significant African-American history at the museum.

The annual attendance at the Old Jail Museum was 1,011 in 2015, in combination with Tudor Hall.

Drayden African American Schoolhouse

The Drayden African American Schoolhouse is a county-owned historic schoolhouse on Cherryfield Road near Valley Lee. The 400-square-foot wood frame building is a preserved example of an early 20th century African American school used during the segregation period in St. Mary's County. The site has minimum off-road parking and exterior interpretive panels. Tours can be arranged by appointment. The 2015 pre-arranged tour visitor attendance was 73.

Additional Historic Sites

Summerseat Farm, Mechanicsville
Tudor Hall, Leonardtown

Historic Site Meetings

Ongoing discussions have taken place with the leaders from Historic St. Mary's City, Sotterley Plantation, St. Clements Island Museum and the Southern Maryland Heritage Area Consortium. These discussions are intended to develop a proactive approach to enhancing the interactive overall experience of each site. The leaders agree that this is a priority and are developing budgets and additional support that is needed.

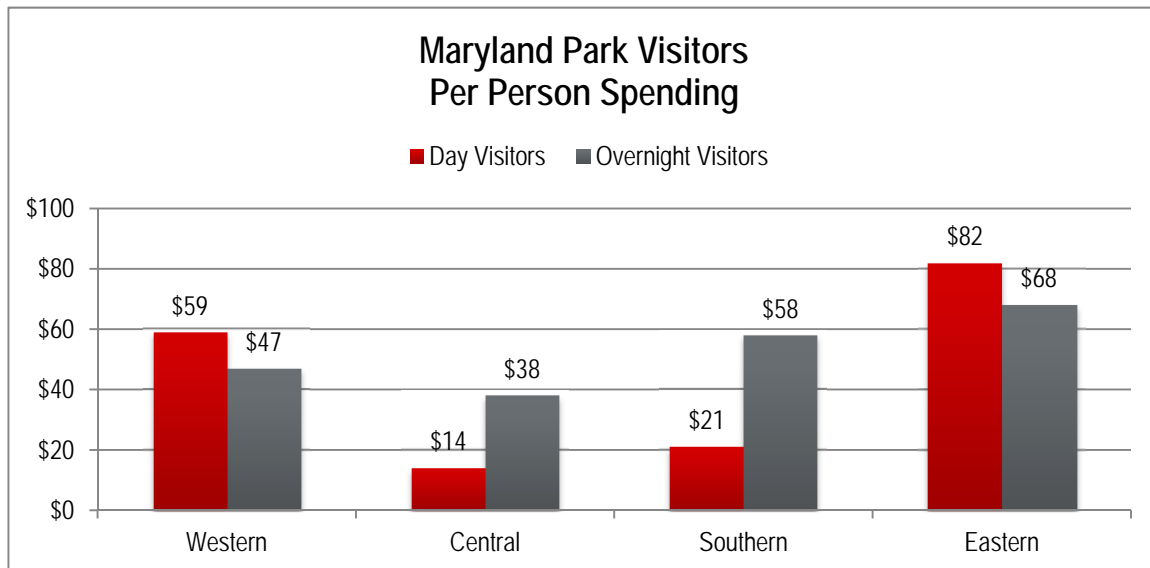
Conclusion: *Collectively, historic sites and museums in St. Mary's County present a broad swath of historic, compelling stories as well as events significant to Maryland and the nation. The sites have great potential to engage and attract visitors, but that will require investment of time, effort, and funding to further develop the "visitor experience" at county sites and museums. This will be a high priority in the master planning process. Supporting the numerous capital projects and programs underway or in the planning stages at the sites and museums should be a first step. Establishing collaborative channels dedicated to connecting stories and programs among the sites is necessary to inspire and encourage travelers to explore.*

Parks

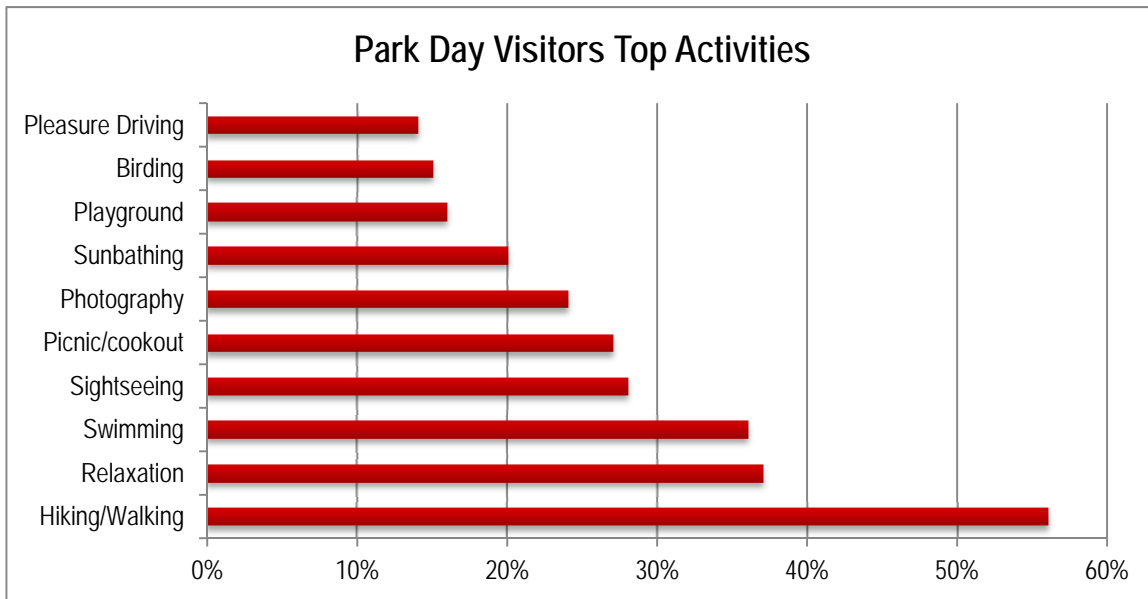
The Maryland Department of Natural Resources Land Preservation and Recreation Plan 2014-2018 states that there is a high participation rate (more than 80%) in outdoor recreation across the state and that walking was the No. 1 recreation activity and the No. 2 was visiting cultural/historical sites. The plan showed there is a desire for enhanced connectivity to trails and that heritage tourism has become a priority for Maryland.

State Parks Overview

A 2010 economic impact study conducted by the State of Maryland indicated high spending levels for overnight lodging in Southern Maryland by park visitors. The same study sites significant expenditures by visitors in gateway communities. While four of the County's five state parks are not within a community cluster, this bodes well for Leonardtown, which is situated near recently opened Newtown Neck State Park. And, with the water-based nature of all the state parks in the County, outfitters and other retail services no doubt benefit. The state parks offer the most opportunities for water access and related outdoor activities and, as such, are extremely important to tourism development in St. Mary's County.



The same study outlined the most popular activities for people visiting state parks. The following graph illustrates the top activities of visitors who did not camp or stay within the park.



Greenwell State Park, Hollywood

Greenwell State Park is operated in partnership with the Greenwell Foundation. DNR cares for the land and facilities while the foundation develops and manages the programs. The foundation is committed to full accessibility to individuals, regardless of their abilities. While that may be a vision shared by all, the foundation's commitment to making this vision a reality makes the park a unique place in the marketplace.

Facilities at Greenwell include 600 acres of parkland, 10 miles of trails, and two miles of waterfront along the Patuxent River. Amenities include an accessible 50-foot pier, kayak/canoe launch sites, beach, and picnic areas. Quarter Creek Pavilion and Rosedale Manor House are wheelchair accessible. The manor, chapel, and gardens are available for weddings and events. All-inclusive programs include recreational and therapeutic horseback riding lessons, summer camps, and special events. There is also 187 acres of public hunting lands.

In 2015, the park saw 73,342 visitors.

Newtowne Neck State Park, Compton

Cradled by Breton Bay, the Potomac River, and St. Clements Bay, this 776-acre property with woodlands, wetlands, and agricultural fields offers low-impact recreational opportunities such as biking, walking, kayaking, hunting, birding, and fishing. Capt. John Smith explored the waters surrounding the property in 1608. Newtowne was the first settlement in the Maryland province after St. Mary's City. Hunting is permitted except on Sundays. Goose field blind sites are open Saturdays, Mondays, and Thursdays only.

The State of Maryland acquired the Newtowne Neck peninsula in 2009 to preserve the area's rich natural, cultural and historical heritage. A recently completed master plan includes \$700,000 in improvements over the next five years. Some of the highlights include an extension of trails, new kayak launches, two paddle-in campsites, improved beach access, improved fishing areas and a transient pier.

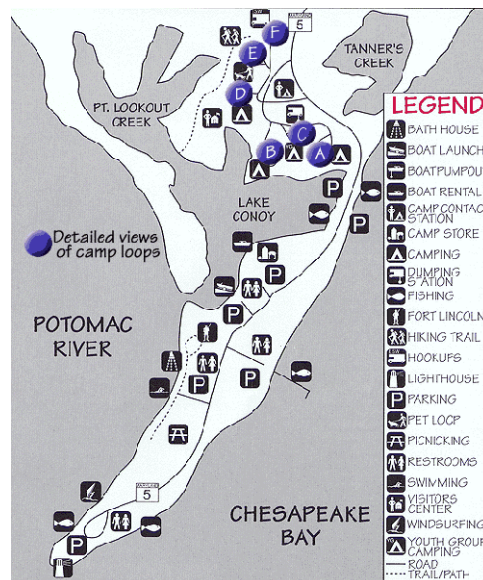
Visitation in 2015, the park's second year in operation, was 31,543.

Point Lookout State Park, Scotland

Located at the tip of St. Mary's County, Point Lookout combines a rich history with recreation options. This is one of the state's most popular parks.

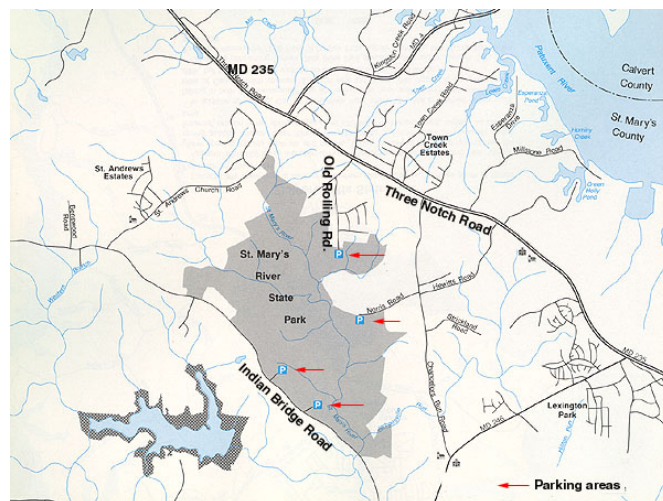
Point Lookout offers 143 wooded campsites (26 full hook-ups, 31 electric); one campsite for youth groups; 710-foot fishing pier and surf fishing areas; swimming beach with grills, picnic tables, playground, showers and restrooms; boat launch facility; fish cleaning station; boat rentals; and a camp store. The park is open for active night fishing after sunset. Hunting is allowed on approximately 240 acres. Point Lookout Lighthouse is located at the southern tip of the park. The point's rich Civil War history is found at Fort Lincoln and at the Point Lookout Civil War Museum.

In 2015, the visitation was 128,423.



St. Mary's River State Park, Callaway

At the north end of the St. Mary's River watershed in the center of the county, the park consists of approximately 3,000 acres of land with a 250-acre fishing lake. The relatively flat landscape of St. Mary's County is not usually thought of as mountain biking terrain, but a 7.5-mile course encircles the lake. The lake offers freshwater fishing and is designated a trophy bass lake. Only electric boats are permitted. The State Park is divided into two areas: Site 1 includes St. Mary's Lake and has full public access, Site 2 is a wild lands and managed hunting area. Hunting is allowed on 2,200 acres.



St. Clement's Island State Park, Colton's Point

The history of St. Clement's State Park dates back to 1634, when the first English settlers under the Baltimore proprietorship sailed to St. Clement's Island on the Ark and the Dove. The 40-acre park is only accessible by boat. Water taxi transportation (26 passengers) is offered on weekends in the summer. Activities on the island include hiking, picnicking, and fishing. Camping facilities are available and hunting is permitted.

The county-operated St. Clement's Island Museum provides the water taxi service. An interpretive guide accompanies the taxi group, offering information about the island's history and that of Blackistone Lighthouse visitors.

In 2015, the visitation was 8,593

Beaches

While the existence of jellyfish during the summer in the Chesapeake Bay and its tributaries keeps the area from becoming a beach-going mecca, the swimming beaches in the county are extremely popular and fill with visitors from outside the county on summer weekends. During the weekdays, visitation is mostly by locals.

Elm's Beach Park, Lexington Park

Elm's Beach Park is operated by the County Department of Recreation and Parks. It is located along the Chesapeake Bay in South County and has 80 acres dedicated to unsupervised swimming with a picnic pavilion, playground, portable restrooms, changing area, and parking. This park is extremely popular and receives the "overflow" from Point Lookout State Park beachgoers. DRP plans to enhance facilities in the coming years. The beach is a portion of the larger Elms Property of 1,020 acres: 311 of which are dedicated to Board of Education Environmental Programming, 85 to county-managed hunting, and 544 to DNR-managed hunting.



Myrtle Point Beach Park, California

Myrtle Point Beach Park is operated by the County Department of Recreation and Parks. It is located along the Patuxent River across from Solomons Island and has nearly two miles of shoreline including beach areas (no lifeguard), picnic tables, informal canoe/kayak launching, three miles of hiking trails, parking, and portable restroom facilities.

Point Lookout State Park Beach, Scotland

The swimming beach at Point Lookout State Park is along the Potomac River. This is the most popular beach in the county and fills to capacity in the summer when it is open for swimming, during which there is a lifeguard on duty. The beach offers grills, picnic tables, and a playground.

Potential New Beach at Shannon Farms

This recently acquired property lies along the Chesapeake Bay at the northern edge of South County. DPR plans to construct a swimming beach at this location.

County Parks

St. Mary's County Department of Recreation and Parks maintains the 20 parks listed below. Parks are located throughout the county and are primarily community parks with various sporting and recreational amenities such as baseball diamonds and tennis courts. The municipal parks in Leonardtown are discussed in the Leonardtown section.

Cardinal Gibbons Park, Ridge
Carver Heights Community Park, Lexington Park
Cecil Park, Valley Lee
Chancellor's Run Regional Park, Great Mills
Chaptico Park, Mechanicsville
Dorsey Park, Hollywood
Elm's Beach Park, Lexington Park
Fifth District Park, Charlotte Hall
Hollywood Soccer Complex, Hollywood
Jarboesville Park, Lexington Park
John G. Lancaster Park, Lexington Park
John Baggett Park at Laurel Grove, Mechanicsville

Laurel Ridge Park, Mechanicsville
Miedzinski Park, Leonardtown
Myrtle Point Park, California
Nicolet Park, Lexington Park
Seventh District Park, Bushwood
St. Andrews Estates Park, California
St. Clements Shores Park, Leonardtown
Town Creek Park, California

Conclusion: *State parks will be at the core of any effort to attract visitors seeking to interact with the natural environment and participate in outdoor recreational activities such as hiking, trail riding, paddling, fishing, camping, and hunting. Since the inception of the tourism master planning process, the limited amount of access to the water has been cited as the greatest impediment to tourism growth and as such, must be addressed. With five water-based state parks, it is here that visitors find the most direct access to uninterrupted shoreline. However, for many, water access means beach access for swimming. In terms of swimming beaches, this is where county offerings fall far short of demand. The addition of a swimming beach at Shannon Farms will help in fulfilling this need, and will add another amenity to South County offerings.*

Arts and Culture

The development of arts and culture experiences in St. Mary's County should be taken into consideration as part of the master plan process. The interest in cultural tourism continues to remain high with a new development called creative tourism that includes hand-on arts and cultural activities.

Performing Arts

The Newtowne Players and Three Notch Theater, Lexington Park

The Newtowne Players is the only community theatre group in St. Mary's County. Established in 2006, the group entered into a partnership with St. Mary's County government, which leases the Lexington Park Library to the group. The library was then refurbished and the group offers a full annual schedule of performances.



St. Mary's College of Maryland, St. Mary's City

The college offers a lecture series and theater and music performances and has plans to construct a multipurpose, 700-seat auditorium to serve as the consolidated venue for most of its public activities. The college also has a small art gallery open to the public. The college produces a popular seven-week summer music festival with concerts on Friday evenings. Often cited as a tourism draw, The River Concert Series featuring the Chesapeake Orchestra attracts a loyal and supportive audience of local residents; its Friday-night schedule makes it difficult to a weekend audience from outside of the area. The music director continues to seek other venues for the orchestra, which also performs at Woodlawn Farm and provides ensemble performances on occasion in Leonardtown.

Arts & Entertainment District, Leonardtown

Maryland's Arts & Entertainment (A&E) Districts help develop and promote community involvement, tourism, and revitalization through tax-related incentives that attract artists, arts organizations, and other creative enterprises. A&E Districts collectively supported an estimated 6,000 new jobs that paid \$199 million in wages. During the same year,

new jobs combined with A&E District festivals and events supported more than \$571 million in state GDP and \$39 million in state and local tax revenue. There are currently 24 A&E districts in the state.

After Leonardtown received A&E certification in 2013, the town has worked to further arts activities and events and hosted the first Southern Maryland Film Festival in 2015 and an “Art-Work-Shop” campaign which combined creative and retail experiences to visitors. Ongoing arts events include First Fridays and summer outdoor concerts. The St. Mary’s County Arts Council actively engages with the town and shares its vision of the town as an arts-based community.

The town has 11 arts entities within the confines of the district, which centers on the historic downtown. These include:

- Bella Music School — music lessons
- Black market Interiors — home furnishings and accessories
- Caught My Eye — clothing, jewelry, small objects
- Crazy for Ewe — yarns and knitting accessories, classes
- David’s Antiques and Flowers — florist and antique/collectible combo
- Fenwick Street Used Books and Music — secondhand books, albums, CDs, DVDs
- Fuzzy Farmers Market — textile crafts and apparel
- Heritage Chocolates — house-made chocolates
- Leonardtown Arts Center — rentable studio space, gallery space
- North End Gallery — artist co-op gallery
- Opal Fine Arts Gallery — art gallery
- Wine and Design — franchise arts operation
- Yellow Door Arts Studio — classes in various mediums for children

The owner of Rex Restaurant, located in the lobby of town’s old movie theater, has announced plans to refurbish the gutted theater section as a concert and performance venue.

Leonardtown Arts Center

The Leonardtown Arts Center is housed within a privately owned building and is overseen by the St. Mary’s County Arts Council. The building owner leases space to artists for studios and retail sales. The center opened prior to the town’s A&E designation as a means to kick-start arts activity in the town. However, studio occupancy remains low.

Future Performing Arts Center

Leonardtown’s Tudor Hall Farm property is discussed in the Leonardtown section; however, worth noting here is the potential inclusion of a performing arts center with amphitheater as part of the development. Viki Volk, director of the Community Development Corporation for Lexington Park, envisions a performing arts center that adjoins Lancaster Park and borders Route 235.

Conclusion: *Developing ways to support cultural development in St. Mary’s County is important. A cultural performing arts center ranked high in “aspirational improvements” in the early stakeholder survey. While the college offers can extend its offerings with its planned auditorium, a performing arts center would move beyond an auditorium’s scope and operational structure. Performing arts centers are significant investments and require ongoing support — and they require a location, with capacity for parking and a mix of surrounding amenities conducive to their success. The arts and culture opportunities have great potential and should be woven together*

through the development of a cultural plan with an overarching approach on enhancing and supporting future arts and cultural initiatives.

Thematic Assets

The following assets are organized according to themes as they either appeal to a specific enthusiast or would generally be experienced together as a single experience.

Civil War

According to the Civil War Trust's 2015 Economic Impact Study, "Blue, Gray and Green," major Civil War sites each add about \$11.7 million per year to local government and a typical family of four spends \$1,000 during its battlefield visit. Although St. Mary's County is not a battlefield location, and these economic impact figures relate to battlefield visits, it may be reasonable to assume that further development of the County's rich Civil War history and constellation of related sites could increase visitation with beneficial economic impact to the area.

St. Mary's County possessed a cultural affinity with the Old South, but its location in a state that the Union absolutely could not let declare secession, meant an extraordinary Union military presence. Compelling stories center around Point Lookout's role as a Confederate Prisoner Camp, and local African-American contributions to the war effort.

Beyond the interpretive markers associated with the Maryland Civil War Trail, *Booth's Escape*, the County has five memorial monuments, a small Civil War Museum, and three major sites including remnants of the largest prison camp for Confederate soldiers at Point Lookout. Sites also include the tiniest Civil War Monument in the nation (USS Tulip Monument) and the only federal monument to the Confederate Soldier.

Sites

Point Lookout State Park Civil War Museum, Scotland
Point Lookout State Park Fort Lincoln, Scotland
Point Lookout Confederate Cemetery, Scotland
Confederate Memorial Park, Scotland
Sotterley Plantation , Hollywood
USS Tulip Monument, St. Inigoes
United States Colored Troops Memorial Monument, Lexington Park
Town of Leonardtown

Conclusion: *The local interpretive markers of the Civil War Trail, combined with other Civil War assets merit forming a local Civil War driving itinerary. Additionally, Point Lookout is the County's anchor Civil War Site and its Civil War Museum tells that story. While its story is well known among Civil War enthusiasts, it remains less known to the general public. The museum's limited size, hours, and access hamper efforts to develop the County's attractiveness as a Civil War destination to a broader audience. Re-visioning the museum to overcome current limitations could serve to attract Civil War and general leisure travelers with economic effects for South County. Management at Point Lookout State Park and leadership are receptive to relocating the museum within the park, which would provide easier access. Another idea is to construct a Civil War Visitor Center outside of, but immediately adjacent to, the park to be operated in partnership with the park.*

African American Heritage

African-American history in Maryland begins in 1634 with the arrival of indentured servant Mathias de Sousa, one of 140 settlers who established Maryland. Although de Sousa's story is inspiring — he voted in the early legislature, as tobacco became the basis for the Southern Maryland economy, slavery soon took hold. Local historic sites and museums such as Sotterley Plantation, the US Colored Troops Memorial and Drayden African American Schoolhouse, tell the local African-American story while mirroring the larger story of the nation.

The Unified Committee for Afro-American Contributions (UCAC) is the guiding force behind interpretation and dissemination of local African-American history. UCAC has produced traveling exhibits, collected oral histories, erected monuments and markers and established an annual Juneteenth Celebration. Several years ago, a UCAC-St. Mary's County partnership produced a guide to local African-American sites and churches. Recently, UCAC worked with the County's Department of Recreation and Parks to adapt and reuse a modest residence under state easement and create a meeting space in Lancaster Park that connects via interpretive markers to the U.S. Colored Troops Memorial.

African-American Sites

Historic St. Mary's City, St. Mary's City
United States Colored Troops Memorial Monument, Lexington Park
African-American Monument at Freedom Park, Lexington Park
Cardinal Gibbons Park, Ridge
Drayden African American Schoolhouse, Drayden
Old Jail Museum, Leonardtown
Point Lookout State Park, Scotland
Pathway through History Markers, Lexington Park
St. Clement's Island Museum, Coltons Point
St. Jerome's Hall, Ridge
Sotterley Plantation, Hollywood

Historic Black Churches

Bethesda United Methodist Church
Ebenezer African Methodist Episcopal Church

First Missionary Baptist Church
Galilee United Methodist Church Cemetery
Mt. Calvary United Methodist Church
Mt. Zion United Methodist Church
St. Luke Union American Methodist Episcopal Church
St. Luke United Methodist Church
St. Mark Union American Methodist Episcopal Church
St. Peter Claver Church and McKenna Hall Museum

Conclusion: *The configuration of meeting space, monument, and open parkland at Lancaster Park as cited above has the potential to become a cohesive visitor experience. Although small, the center could hold modest displays of interest to visitors. The addition of a natural-in earth amphitheater for story-telling and small musical events and landscaping features could make the site very special.*

Amish and Mennonite Community

During the 1930s, Amish and Mennonite families left Lancaster, PA, and relocated to St. Mary's County. There are several Amish and Mennonite enterprises related to farm production and food processing. These are discussed in the Farm and Food section of this report. While the Amish and Mennonite communities are interested in expanding the awareness of the products they produce and increasing revenues, they have no interest in creating an immersive experience. However, there are several ways visitors can experience Amish and Mennonite culture. These include scenic drives through the northern and central portions of the county along roads dotted with farms and traversed by buggies, and visiting shops that offer Amish-made leather goods, furniture, and quilts for sale to the public. The County's senior living program Learning is Forever offers an extremely popular shopping tour of such outlets.

Amish and Mennonite Retail Sites

Henry B. Stauffer Local Crafts
Zimmerman's Greenhouse
Stauffer's Produce and Greenhouse
Dove Point Lane Grocery
Green Acres Nursery
Quilt and Crafts, Friendship Furniture
Loveville Produce Auction
Gehman's Utility Barns
Wenger's Electric Motor Service
Friendship Buggy Shop
Hillalee Greenhouse
Thomas Swarey Chair Caning
Kurtz's Furniture Shop
Hertzler's Mini Barn
Mast Furniture Shop
HSK Furniture Repair, Antiques and Goats
Pine View Amish Grocer
Hertzler's Modular Homes and Fabric Shop
Granpa's Place Custom Woodwork

Clover Hill Dairy
Yoder's Furniture I and Yoder's Furniture II
Locust Grove Fabric Shop and Greenhouse
Kurtze's Cabinet Shop and Variety Store
Quilts and Crafts

***Conclusion:** Creating a shopping trail based on the retail sites and farmer's markets would be a good step in creating an organized experience for visitors. Several small, non-Amish enterprises offer Amish and Mennonite items such as gazebos and furniture, but the item is disconnected from the craftsman, and has little visitor appeal. An Amish- or Mennonite-owned and operated craft center that brings together items from various makers might merit exploring. A new produce market facility, as discussed in the Farm and Food section, might be able to accommodate an expansion into retail items.*

Lighthouses

There are an estimated 700 or more lighthouses in the United States. Most were built and or established by the U.S. Lighthouse Board from 1852 to 1910. Lighthouses have taken on roles as museums, B&Bs, and settings for weddings. The Chesapeake Bay has numerous lighthouses including four in St. Mary's County.

Blackstone Lighthouse, St. Clement's Island (managed by the St. Clement's Island Museum), Coltons Point (water access only)
Piney Point Lighthouse, Piney Point Lighthouse, Museum and Historic Park, Piney Point
Point Lookout Lighthouse, Point Lookout State Park, Scotland
Point No Point Lighthouse, Chesapeake Bay (water access only)

Lighthouses are emblematic of maritime culture and the four in St. Mary's County are important visitor assets. Although Blackstone Lighthouse is only accessible by water, it is integrated into interpretive programs of the St. Clement's Island Museum, which manages the site under an agreement with Department of Natural Resources. A water taxi operated by the museum runs to the island on summer weekends. Piney Point Lighthouse is fully interpreted and forms the central experience for visitors at the Piney Point Lighthouse Museum and Historic Park. Point Lookout Lighthouse at Point Lookout State Park is open seasonally one day a month by the Friends of the Point Lookout Lighthouse. In poor repair, the lighthouse and two adjacent buoy sheds are undergoing restoration by DNR. Enhanced interpretation is also planned. Point No Point is featured in water excursions.

***Conclusion:** Because lighthouses are so important to St. Mary's heritage, they should be a priority in development of a robust visitor experience. The importance of restoration, addition of enhanced interpretation, and greater public access to the Point Lookout Lighthouse cannot be understated. With enhancement of its Civil War offerings and road improvements, the park is key to South County tourism development.*

Religious Heritage

Maryland's first colony is where the concepts of religious toleration and separation of church and state were introduced to the New World. The County's religious heritage sites and colonial churches speak to this time of experimentation. In addition to the historic churches within the purview of the Religious Freedom National Scenic Byway, others lie outside the Byway's scope, such as Dent Chapel in Charlotte Hall, which has been noted as the

finest example of Victorian vernacular church architecture in Maryland. The County also contains churches important to the African-American story.

Religious Heritage sites

St. Clement's Island
Historic St. Mary's City Brick Chapel
St. Andrew's Episcopal Church
St. Francis Xavier Church
St. George's Episcopal Church
St. Ignatius Church
Christ Episcopal Church, King and Queen Parish
All Faith Episcopal Church
All Saints Episcopal Church
Dent Chapel

Conclusion: *The Religious Freedom National Scenic Byway offers a good means of exploring the County's early religious history. However, additional experiential offerings, such as itineraries and tours that expand and extend that story and include other local churches, could serve to enhance the visitor experience.*