



Montgomery County Agricultural Reserve Study Report

**Submitted by:
Department of Commerce**

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Wes Moore, Governor | Aruna Miller, Lt. Governor

Montgomery County, Maryland Agricultural Reserve Study

I. Introduction

Chapter 235 of the 2025 Legislative Session requires the Maryland Department of Commerce to conduct a study on economic development and the tourist and visitor economy of the Montgomery County Agricultural Reserve. This study finds that the Agricultural Reserve functions as a regional, primarily day-trip destination, where visitor spending plays an increasingly important role in supporting the financial viability of farms and small businesses. Barriers such as limited lodging, transportation constraints, and limited wayfinding reduce the Agricultural Reserve's ability to capture the full economic benefits of visitation.

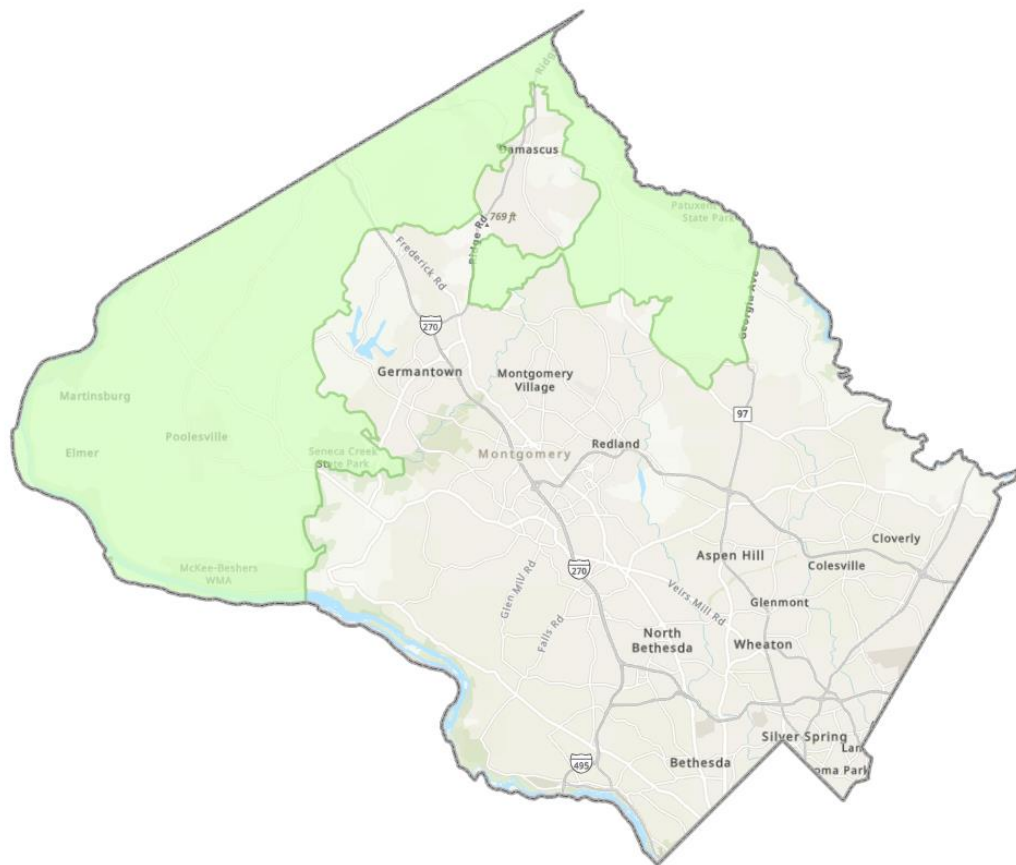
The goal of this study is to better understand the role of tourism and visitation within the Agricultural Reserve, complementing existing knowledge of its agricultural economy. This study examines how visitors perceive the Agricultural Reserve, why they visit, where they originate, and which assets they find most compelling. It also identifies the small businesses, recreational assets, and historic resources that contribute to the visitor economy.

This study was conducted through a collaborative framework that integrates existing data with stakeholder input and expertise.

- **Agricultural Reserve Familiarization Tour:** A tour of the Agricultural Reserve was given to better understand the geography and community of western Montgomery County. Businesses visited included Deere Valley Farm, Calleva Farm, One Acre Farm, Riverworks Art Center, Rocklands, The Garage/Honey Acres Farm, and Lewis Orchard. The tour included additional discussions and points of view provided by Poolesville Town Commissioners, and members of the Sugarloaf Citizens Association, Fair Access Committee, Maryland General Assembly, and the Montgomery County Farm Bureau.
- **Roundtable Review:** A roundtable consisting of the Montgomery County Revenue Authority, Visit Montgomery, Maryland Department of Agriculture, Poolesville Fair Access Committee, Maryland General Assembly, Montgomery County Councilmembers, Montgomery County Office of Agriculture, and Montgomery Planning Board convened to serve as the primary vehicle for data sharing, discussion, and analysis.

The term *visitor* is used throughout this report in reference to the terminology employed by the underlying data sources. Because this study draws upon multiple datasets and stakeholder input, the definition of a visitor varies by source. For example, the Maryland Office of Tourism defines a visitor as a person who stays one or more nights and/or travels more than 50 miles to their destination. Other reports and studies may use different methodologies or definitions. Throughout this report, references to visitors reflect the terminology and methodology of the original cited source.

II. Montgomery County Agricultural Reserve



Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community

Figure 1: Montgomery County Geographic Information Systems Office. (2026). Map of Montgomery County with the Agricultural Reserve shown in green.

The Montgomery County, Maryland Agricultural Reserve is a nationally recognized¹ 93,000 acre land-use zone representing nearly one-third of the County's total land area. Montgomery County is home to 583 farms with a market value of products sold exceeding \$70,900,000.² The Agricultural Reserve was established in 1980 to preserve farmland and open space, and has since successfully maintained agriculture as a foundation of its rural landscape. Approximately 70,000 acres (75%) are protected through permanent easements that restrict residential, industrial, and commercial development.³

This preservation framework is supported by a coordinated set of County and State agricultural land preservation programs, each designed to limit future development and

¹ Montgomery County Agricultural Reserve won the 2017 APA Planning Landmark Award

² Montgomery County Office of Agriculture. Ag facts.

³ Montgomery Planning. (2019). Agritourism study.

maintain land for agricultural use. These programs place easements on properties through a combination of development rights purchases and tax-based incentives, ensuring long-term protection of farmland. The programs include the Montgomery County Agricultural Easement Program (AEP), Transfer of Development Rights Program (TDR), Building Lot Termination Program (BLT), Maryland Agricultural Land Preservation Foundation (MALPF), Maryland Environmental Trust (MET), Montgomery County Rural Legacy Program (RLP), and the Legacy Open Space Program (LOS).⁴

The zoning of the Agricultural Reserve (AR zone) encourages agricultural use and limits development to one house per 25 acres. Prior to implementation in 1980, development had been allowed at the rate of one house per 5 acres. “Economic studies indicated that this [25 acres] was a sufficient amount of land for a viable farm in Montgomery County,” Dr. Royce Hanson, former Montgomery County Planning Board Chair.⁵ Dr. Royce Hanson and former Planning Director Richard Tustian, with the support of the County Council, initiated the effort that would create the Agricultural and Rural Open Space Master Plan in 1980.⁶

While agriculture remains central to the Agricultural Reserve, value-added agriculture, agritourism, and the broader visitor economy increasingly complement traditional production agriculture and provide supplemental economic opportunities for some farms and small businesses. Diversified income streams can help build resilience against market volatility. Maintaining a balanced and diverse agricultural economy is important to the long-term sustainability of the Agricultural Reserve.

III. Agricultural and Business Economy

Agricultural Economy

Farming and farmland are essential to the Agricultural Reserve and its economy. Trends in total farm operations are shown in Figure 2. In 1978, just prior to the establishment of the Agricultural Reserve, Montgomery County had 667 farms. This number declined to 561 by 1992,⁷ then increased slightly to 596 in 1997, before gradually decreasing to 540 farms by 2012. Since then, the number has rebounded, with the County now supporting 583 farms, an increase of 25 farms since 2017.

Approximately 355 of these farms produce crops on a total of 51,340 acres.⁸ Total farmland operated in the County is demonstrated in Figure 4, with the most recent

⁴ Montgomery County Office of Agriculture. Agricultural preservation.

⁵ MoCo Alliance. Growing legacy: Montgomery County’s Ag Reserve [Video].

⁶ Montgomery Planning. Agricultural Reserve award.

⁷ Montgomery Planning. (2019). Agritourism study.

⁸ Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

Census of Agriculture reporting just over 69,759 acres. This includes crops as well as land for other farm related purposes.⁹

As shown in Figure 3, Montgomery County gained large (over 1,000 acres) and small (under 50 acres) farms but lost midsized farms. This trend aligns with national trends, however, Figure 5 demonstrates the median farm size in Montgomery County is small compared to more rural counties in Maryland and nearby Virginia.¹⁰

Recent reports indicate that 92% of farms in the County are family-owned, including many, if not all, of the large production farms that account for a substantial share of the Agricultural Reserve's land base.¹¹ The decline in mid-sized farms, combined with growth in smaller farms, may reflect an increasing diversification in farm business models. While some farms supplement agricultural income through agritourism and direct-to-consumer activities, others continue to rely primarily on wholesale production, Community Supported Agriculture (CSA) subscriptions, farmers markets, and regional supply chains.

Stakeholder input emphasized the importance of maintaining a balanced agricultural economy that includes not only small diversified farms and large-scale operations, but also economically viable mid-sized production farms. The continued loss of mid-sized farms may represent a vulnerability, as a resilient agricultural economy depends on a diversity of farm scales and business models.

While visitor-oriented activities and value-added agriculture play an important role in supporting portions of the Agricultural Reserve economy, production agriculture remains central to the purpose and long-term viability of the Reserve. Row-crop, hay, nursery, and livestock operations remain central to the Agricultural Reserve's economy and preservation mission. As agritourism and visitor-oriented activities continue to evolve, maintaining agricultural production as the primary focus of the Reserve will be important to ensure that future initiatives do not unintentionally prioritize one type of farming operation over another.

The Statewide Guidance and Analysis on Maryland's Value-Added Agriculture and Agritourism from the Maryland Department of Agriculture confirms this trend by stating that Maryland's smaller parcels are evidence of a changing farm footprint.¹²

⁹ Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

¹⁰ Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

¹¹ U.S. Department of Agriculture. (2022). 2022 Census of agriculture county profile: Montgomery County Maryland.

¹² Proulx, M., & Boline, A. (2025). Statewide guidance and analysis: Maryland's value-added agriculture and agritourism. Maryland Department of Agriculture.

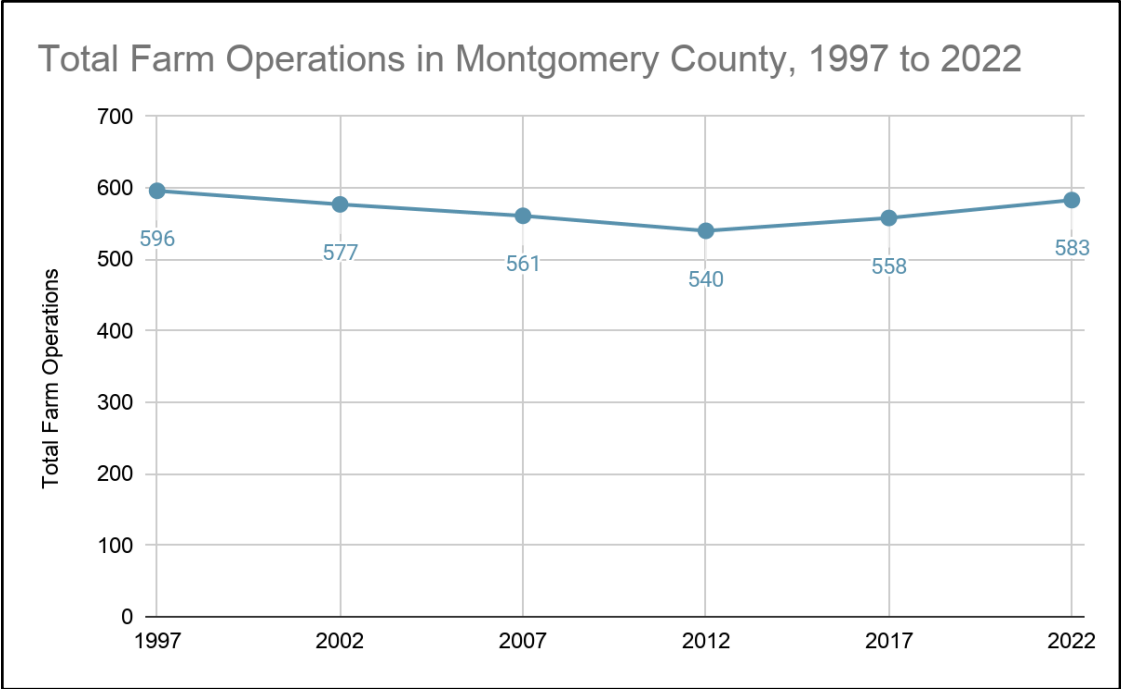


Figure 2: Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

Change in Number of Farms by Size Category in Montgomery County

Size Category	2002	2007	2012	2017	2022	Change (2002-2022)
Area Operated: (1,000 or more acres)	13	12	11	13	18	5
Area Operated: (500 to 999 acres)	20	15	15	17	12	-8
Area Operated: (180 to 499 acres)	62	52	39	37	52	-10
Area Operated: (50 to 179 acres)	134	118	114	102	75	-59
Area Operated: (1.0 to 49.9 acres)	348	364	361	389	426	78
Total Operations	577	561	540	558	583	6

Figure 3: Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

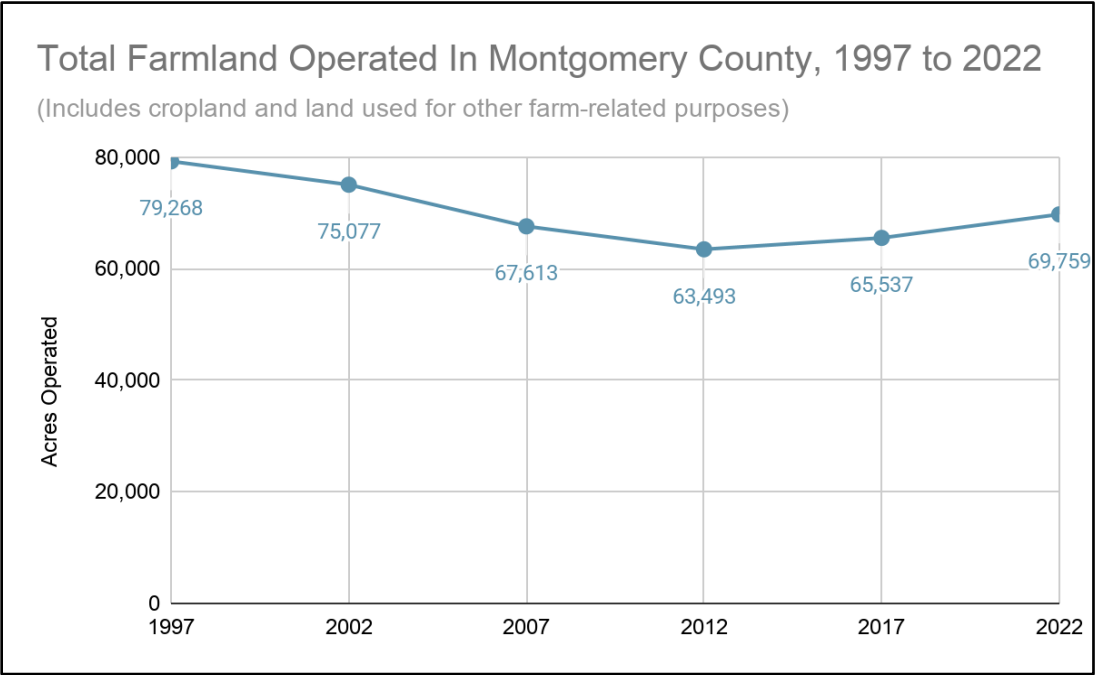


Figure 4: Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

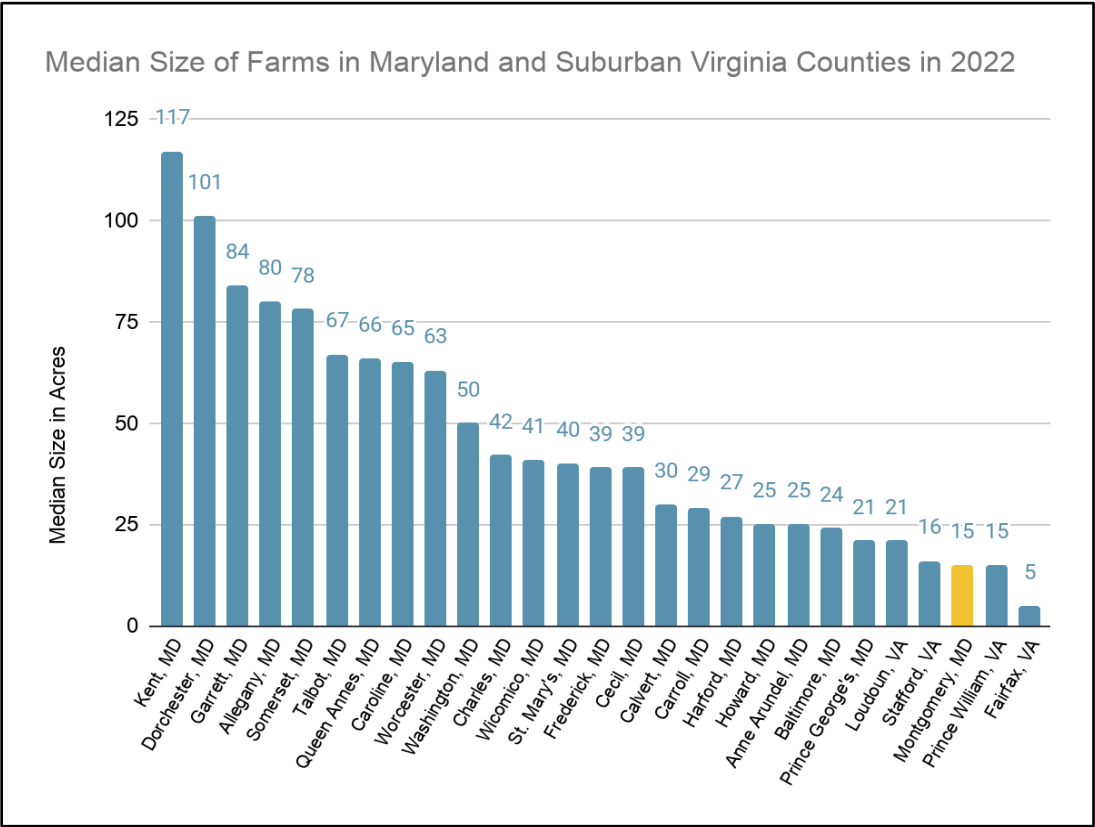


Figure 5: Montgomery Planning. (2024). Summary of Montgomery County agricultural industry from the USDA Census of Agriculture and gross regional product data: USDA Census of Agriculture data summary.

Business Economy in the Agricultural Reserve

As of January 2026, data shows there are more than 200 businesses, excluding home-based businesses, operating in the Agricultural Reserve.¹³ Approximately 99% of these businesses are classified as small businesses, with 94% employing fewer than 10 people.¹⁴

The Agricultural Reserve's economy remains rooted in agriculture, while local businesses, visitor activity, and related services contribute to the broader rural economy.

An analysis of businesses by 3-digit NAICS code, as shown in Figure 6, further illustrates the diversity of economic activity within the Agricultural Reserve. At 6.8%, Crop Production (NAICS 111) represents a large share of the establishments. The prominence of Administrative and Support Services (NAICS 561), particularly landscaping, also accounts for a notable share of establishments.

Construction (NAICS 236 and 238), particularly specialty trades, also represent a significant share of the establishments. Recreation (NAICS 713) and Civic or Social Organizations (NAICS 813), which include nonprofits, membership organizations, and community associations, reinforce the Agricultural Reserve's function as a working landscape and a community asset. Agritourism activities are not represented by a single NAICS category and may occur within several industries, including crop production, beverage manufacturing, and recreation, depending on the primary business activity.¹⁵

Overall, the NAICS distribution reflects an economy in which agriculture remains the foundation of the Agricultural Reserve, while a diverse group of industries and community-based establishments provide complementary economic activity.

¹³ Data Axle Reference Solutions. (2026, January). Business establishment data for Montgomery County Agricultural Reserve

¹⁴ SBA defines a small business as having less than 500 employees.

¹⁵ Data Axle Reference Solutions. (2026, January). Business establishment data for Montgomery County Agricultural Reserve

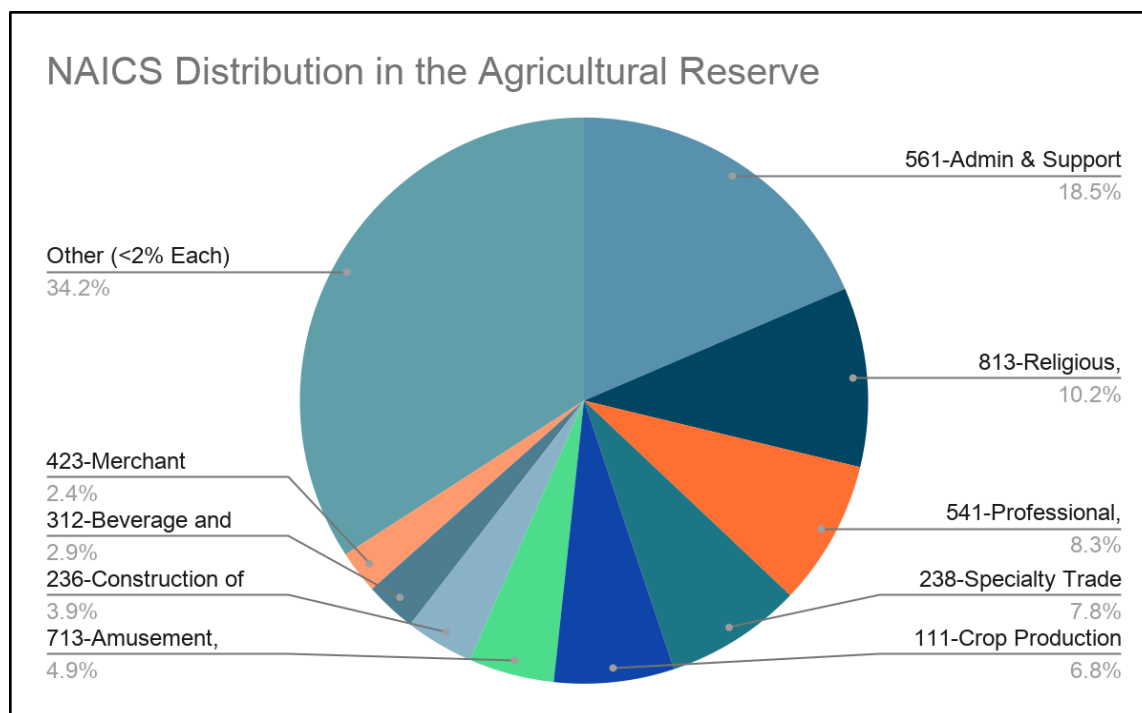


Figure 6: Data Axle Reference Solutions. (2026, January). Business establishment data for Montgomery County Agricultural Reserve

While these businesses are all geographically located within Montgomery County's Agricultural Reserve, it includes municipalities that are in or adjacent to the Agricultural Reserve such as Poolesville and Barnesville. These communities operate under separate zoning frameworks that allow for higher density residential and commercial uses. As a result, some establishments reflect activity within these town centers rather than the surrounding Agricultural Reserve zoning. In addition, a limited number of businesses may persist as legal nonconforming uses, established prior to current zoning restrictions and permitted to continue under County regulations. Together, these factors should be considered when interpreting the presence of non-agricultural industries within the Agricultural Reserve.¹⁶

IV. Visitor Profiles and Motivations

Visitor and Community Perception

Existing studies and stakeholder input indicate that visitors view the Agricultural Reserve as a unique rural landscape that offers access to farmland, open space, and historic and cultural resources. It is often perceived as a place to experience local agriculture, including farm-to-table activities, agritourism, and directly engage with local farmers. This perception is reinforced by a growing interest in locally sourced food and experiential activities. The Reserve is seen as a recreational and educational destination within close proximity to the Washington, D.C. metropolitan area.

¹⁶ Montgomery County Department of Permitting Services. Non-conforming use certificate.

Additionally, community, authenticity, simplicity, and intention are the perceived core values of the area.¹⁷ In a community survey, participants identified key strengths of the Agricultural Reserve.

Key Strengths¹⁸:

- Natural Beauty & Open Space
- Farms & Local Food
- Proximity to Urban Centers
- Protected from Overdevelopment
- Strong Sense of Community
- Recreation & Outdoor Activities
- Education & Stewardship
- Economic & Climate Resilience

When asked “What makes this rural area different from other rural areas you have visited?” survey respondents highlighted several recurring themes.¹⁹

Absence of Overdevelopment and “McMansions”

- When compared to neighboring rural regions:
 - “No pop-up McMansions like in Loudoun Co, VA.”
 - “Big mansions aren’t in abundance like in Virginia.”
 - “It could have been ‘house farms’ and suburbia, but it’s not.”

Natural Beauty, History, and Special Character

- Winding roads, scenery, historic character:
 - “Gorgeous roads winding through the countryside - feels like Italy or France”
 - “Low key most amazing sunsets anywhere!”
 - “Strong history and traditions”

Deep Sense of Community

- “Friendly people with a deep sense of community.”
- “People don’t move away. They want to spend more time here.”
- “The sense of community and focus on farms.”

¹⁷ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

¹⁸ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

¹⁹ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

These responses suggest that the Agricultural Reserve is perceived not only as a rural landscape, but also as a place characterized by strong community connections, agricultural traditions, and a distinct local identity.

There is an opportunity to expand these perceptions by elevating the Agricultural Reserve as a shared regional asset and strengthening the broader public's understanding of its value. The Agricultural Reserve serves not only as a local resource, but also as a place that preserves regional identity, purpose, and rural character for the broader community. This can be encouraged through educational experiences, familiarization tours for local leaders and elected officials, and coordinated marketing efforts.

Visitor Attractions or Why They Visit

The visitor economy of the Agricultural Reserve is driven by a diverse mix of attractions. These include agritourism activities such as farmers markets, pick-your-own operations, farm tours, animal sanctuaries, breweries, wineries, summer camps, and equestrian operations.²⁰

In addition, the Agricultural Reserve includes a range of heritage and cultural sites, as well as trails, scenic roads, and waterways. The C&O Canal, open space, and waterways serve as major outdoor recreation assets, attracting visitors who enjoy hiking, biking, birding, horseback riding, canoeing, kayaking, fishing, and hunting. Communities such as Poolesville, Laytonsville, and other rural areas surrounding the Agricultural Reserve also function as local centers²¹ drawing visitors to explore local arts and entertainment, dining, and retail experiences.

In recent years, communities such as Poolesville have also pursued placemaking and community development initiatives intended to enhance quality of life for residents while also supporting visitor activity within the Agricultural Reserve. Projects such as Riverworks Art Center and the planned year-round pool bubble at the Sarah E. Auer Western Montgomery County Swim Center contribute to recreational opportunities, a stronger sense of place, and destination development.

During interviews and focus groups, it was stated that individuals visit farms, breweries, etc. in the Agricultural Reserve because they perceive them to be “authentic.” Visitors are seeking a connection to something simpler and more “real.”²²

Focus group participants and survey respondents identified the Agricultural Reserve's diversity of activities as an important attribute. The scenic beauty, rustic roads, trail

²⁰ Montgomery Countryside Alliance. Exploring the Reserve [Brochure].

²¹ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

²² CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

networks, local food and beverage offerings, and outdoor recreation opportunities are concentrated within a single destination and contribute to the Reserve's appeal.²³

Collectively, these assets create a visitor economy where natural beauty, heritage tourism, and active outdoor recreation intersect to support the financial viability of the Agricultural Reserve's working farms and broader community.²⁴

Agritourism

Agritourism represents an important segment of the Agricultural Reserve's economy, providing opportunities for visitors to engage with working farms and agricultural production. There are 21 agritourism operations²⁵ within the Reserve where visitors and residents can access locally produced food, including pick-your-own operations, farmers markets, animal sanctuaries, and on-farm educational experiences.²⁶

Food producers in the Agricultural Reserve were surveyed and 68% viewed agritourism as a beneficial opportunity for their business, 18% said they were unsure, and 14% indicated they didn't find agritourism beneficial for their business.²⁷

A recurring theme identified through stakeholder engagement is that the definition and interpretation of agritourism continues to evolve as farms diversify their operations and visitor experiences. Maryland has established a statutory definition of agritourism under Land Use Code §4-212, defining it as an activity conducted on a farm that is offered to a member of the general public or to invited guests for the purpose of education, recreation, or active involvement in the farm operation. Agritourism includes farm tours, hayrides, corn mazes, seasonal petting farms, farm museums, guest farms, pumpkin patches, pick-your-own or cut-your-own produce, camping, incidental outdoor stays, classes related to agricultural products or skills, and picnic and party facilities offered in conjunction with any agritourism activity.²⁸

Meanwhile, at the local level, Montgomery County defines agritourism as accessory agricultural education and tourism activities conducted as part of a farm's regular operations, with emphasis on hands-on experiences and events that foster increased knowledge of agriculture, including cultivation methods, animal care, water conservation, Maryland's farming history, the importance of eating healthy, and locally grown foods. Allowed activities include corn mazes, hay rides, and educational tours, classes, and workshops. The maximum footprint for any structure and the total footprint of all structures primarily used for education or tourism is limited to 10% of the total

²³ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

²⁴ White Paper on the Economy of Western Maryland, Town of Poolesville

²⁵ U.S. Department of Agriculture. (2022). 2022 Census of agriculture county profile: Montgomery County Maryland.

²⁶ Montgomery Planning. (2019). Agritourism study.

²⁷ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

²⁸ Statewide Guidance and Analysis: Maryland's Value-Added Agriculture and Agritourism, October 2025

footprint square footage of all structures on the site used for agriculture. The property must have Montgomery County Department of Permitting Services (DPS) approved sanitation facilities for this accessory use.²⁹

According to a Guidance and Analysis Report released in 2025 by the Maryland Department of Agriculture, agritourism has expanded to include a wider range of visitor experiences that existing regulatory frameworks have struggled to keep pace with. Some of these activities may be classified as commercial rather than agricultural uses, subjecting farms to additional requirements and costs. This creates challenges for both farm operators and regulatory agencies at the local and state levels.³⁰

For some farms, agritourism provides an opportunity to diversify revenue streams by offering goods and experiences directly to consumers. In addition to traditional agricultural production, many farms incorporate activities such as seasonal events, farm tours, and youth programming, which broaden their appeal.

Agritourism also plays a role in strengthening public awareness and understanding of agriculture by connecting visitors to local food systems and farming practices. By providing a connection with working farms, these operations help reinforce the Agricultural Reserve's identity as both a productive agricultural area and a destination for experiential, place-based activities.³¹

As agritourism continues to evolve, national organizations, universities, and government agencies have developed guidance resources related to agritourism and rural destination development. These resources may provide additional context regarding planning and related considerations.

Examples include:

- American Planning Association – Agritourism Resource Page³²
- USDA Natural Resources Conservation Service – *USDA Agritourism Resource Manual*³³
- University of Vermont Extension – *Best Practices in Agritourism*³⁴

Craft Beverage Industry

The craft beverage industry is a major attraction within the Agricultural Reserve and serves as a premier example of how value-added agriculture supports the long-term sustainability of farm operations. As of April 2025, there were 13 Farm Alcohol

²⁹ Montgomery County, Maryland. Zoning ordinance § 3.2.6, farming.

³⁰ Statewide Guidance and Analysis: Maryland's Value-Added Agriculture and Agritourism, October 2025

³¹ Centering Agriculture in Agritourism, A Joint Position Statement on Agritourism, November 3, 2025

³² <https://www.planning.org/knowledgebase/agritourism/>

³³ <https://www.nrcs.usda.gov/sites/default/files/2025-04/usda-agritourism-resource-manual-final-4325.pdf>

³⁴ www.uvm.edu/d10-files/documents/2024-09/2019_BestPracticesAgritourism-FINALDRAFT-lores.pdf

Production (FAP) facilities operating in the County, including four wineries, five breweries, two cideries, and two distilleries.

These operations support 78 full-time and 260 part-time positions and generate \$16.8 million in gross sales. In addition, they utilize 374 acres for on-site ingredient production, reinforcing the connection between agricultural production and consumer-facing experiences.³⁵

Local events further enhance the role of craft beverage operations within the Agricultural Reserve. Wineries, breweries, and related facilities regularly host tastings, festivals, and seasonal events that attract visitors and encourage repeat visitation. While these experiences are not widely marketed or organized as trail networks, they already create a connected visitor experience across the Agricultural Reserve.

Recent state and local initiatives have also sought to strengthen the craft beverage industry. Projects such as The Crossvines, a public-private destination and event venue in Poolesville centered around Maryland wine, represent broader placemaking efforts intended to support tourism, local businesses, and the agricultural economy.

Outdoor Recreation

Outdoor recreation is a significant component of Maryland's economy. Statewide, the outdoor recreation industry contributes approximately \$10.6 billion annually to Maryland's economy, supporting more than 85,000 jobs and generating over \$5 billion in wages.³⁶ Within the Montgomery County Agricultural Reserve, outdoor recreation is a major draw for visitors. Visitors utilize the trails, waterways, scenic landscapes and often extend their trips to nearby farms and businesses.

The Chesapeake and Ohio Canal National Historical Park (C&O Canal) serves as a gateway and economic anchor for the Agricultural Reserve, as it draws a large volume of visitors into the region's rural corridors. In 2019, the park recorded 5.1 million visitors, including approximately 1.31 million who traveled more than 50 miles or completed an overnight stay in the area, which is the tourism industry's standard definition of a visitor. As a result, the park captures a significant number of overnight visitors (61%), illustrating a possible need for overnight accommodations (see Section V for Barriers to Visitation).³⁷

At a more local level, the Montgomery County segment of the park attracted approximately 573,000 visitors, who traveled an average of 348 miles and visited nearly five nearby towns per trip. While broader visitor origin data (see Figure 7) indicates that the Agricultural Reserve primarily functions as a regional day-trip destination, the C&O

³⁵ The Status of Farm Alcohol Production in Montgomery County, April 2025

³⁶ <https://news.maryland.gov/dnr/2026/03/17/outdoor-recreation-industry-provides-10-6-billion-impact-on-maryland-economy/>

³⁷ Visitation to the C&O Canal National Historic Park 2019-2020 Visitation Analysis, February 2021

Canal attracts a distinct subset of visitors, including long-distance recreational and overnight travelers. Findings from stakeholder interviews and the familiarization tour indicated that these visitors actively engage with the local economy.³⁸

Although Sugarloaf Mountain is located just outside of Montgomery County in neighboring Frederick County, it remains a significant regional tourism asset influencing visitation patterns within the Agricultural Reserve. Located within a 60-mile radius of just under 10 million residents,³⁹ Sugarloaf attracts nearly a quarter-million visitors seeking hiking, sightseeing, and more.⁴⁰ Stakeholder input and field observations indicated that visitors traveling to and from Sugarloaf frequently utilize the Reserve's rural road network and support surrounding small businesses.

Montgomery County is home to approximately 2,814 horses⁴¹, highlighting the significance of equestrian recreation in the Agricultural Reserve's outdoor economy. The industry is supported by an extensive network of riding trails, horse farms, and equestrian facilities throughout the region.

In Western Montgomery County there are more than 12,500 acres of parkland within the Agricultural Reserve, including municipal, county, state, and federal lands. Additionally, there is a growing network of bike and trail infrastructure that attracts users of all skill levels. The bike network is currently 21 miles, with more than 41 miles of planned future trails. The trail network is just over 23 miles and includes a 19 mile section of the C&O Canal Towpath, a 3 mile section of the Great Seneca Greenway Trail, and small sections at Elizabeth Mills Riverfront Park and the Potomac Heritage Trail.⁴²

Outdoor recreation positions the Agricultural Reserve as a destination for nature-based experiences within the region. The combination of parks, trails, waterways, and working landscapes creates a setting that supports the rural character of the Agricultural Reserve.

Heritage Tourism

There are more than 20 designated heritage sites within the Agricultural Reserve. Visitors are attracted to these heritage sites and enjoy the historic walking, cycling and driving tours. These include two National Register Districts, the Seneca Historic District and the Barnesville Historic District, as well as locally designated districts, sites and resources such as the Darby Store, Seneca Schoolhouse, Warren Historic Site and Maryland-National Capital Park and Planning Commission parks.⁴³ These sites are historically and culturally significant, representing Montgomery County's early

³⁸ Visitation to the C&O Canal National Historic Park 2019-2020 Visitation Analysis, February 2021

³⁹ Montgomery Planning. (2023). Western Montgomery: Economic Overview.

⁴⁰ <https://sugarloafmd.com/history/>

⁴¹ Montgomery County Office of Agriculture. Ag facts. Montgomery County Government.

⁴² Western Montgomery Economic Overview, October 27, 2023

⁴³ Montgomery Planning. (2019). Agritourism study.

agricultural, cultural and industrial heritage, and providing opportunities to learn about historic African American communities and Native American viewsheds and sites.

Many of these historic resources have been preserved due to their location within the Agricultural Reserve, where restrictions on large-scale development have helped maintain the region's historic character. Organizations such as Historic Medley District, Inc. and Heritage Montgomery play an important role in historic preservation, heritage education, and stewardship within the Agricultural Reserve.

Heritage Montgomery is one of thirteen certified heritage areas in the State of Maryland and is dedicated to the mission of promoting local history, culture, and natural areas and fostering stewardship and connection to our heritage. According to the Heritage Montgomery Economic Impact Study, the economic impact of the promotions and grant-making activities totaled \$376.1 million annually. More than \$50 million was generated in state and local tax revenue and approximately 5,300 direct and indirect jobs were supported. This demonstrates the significant role heritage tourism plays in the Agricultural Reserve's broader economy.⁴⁴

Visitor Origin or Where They Come From

Visitor data was analyzed by Designated Market Area (DMA), a geographic region used for media and marketing analysis, and by state of origin using Zartico visitor analytics provided by Visit Montgomery. Zartico utilizes aggregated and anonymized mobile location data to estimate visitor origin patterns and travel behavior. This dataset provides information on visitor origin shares and demographic trends but does not estimate total visitation counts.

These findings indicate that the Agricultural Reserve functions primarily as a regional destination. Of total visitors in 2025, 46.5% originated from the Washington, D.C.-Hagerstown DMA⁴⁵, followed by 19.1% from the Baltimore, MD DMA. When examined by state, Maryland accounted for the largest share of visitors (48.7%), followed by Virginia (14%), Pennsylvania (7%), and the District of Columbia (3.8%).⁴⁶ The comparatively small share of visitors originating from the District of Columbia may represent an opportunity to expand awareness and visitation among nearby urban centers. The Agricultural Reserve's proximity to Washington, D.C., positions it as an accessible destination for day trips, particularly for visitors seeking outdoor recreation, agritourism, and rural experiences within a short travel distance.

⁴⁴ Fair Access Committee White Paper

⁴⁵ The Washington, D.C.-Hagerstown DMA is a media market that includes the Washington metropolitan area and surrounding counties extending into western Maryland.

⁴⁶ Zartico. (2025). Zartico visitor analytics data (Points of interest and visitor trends).

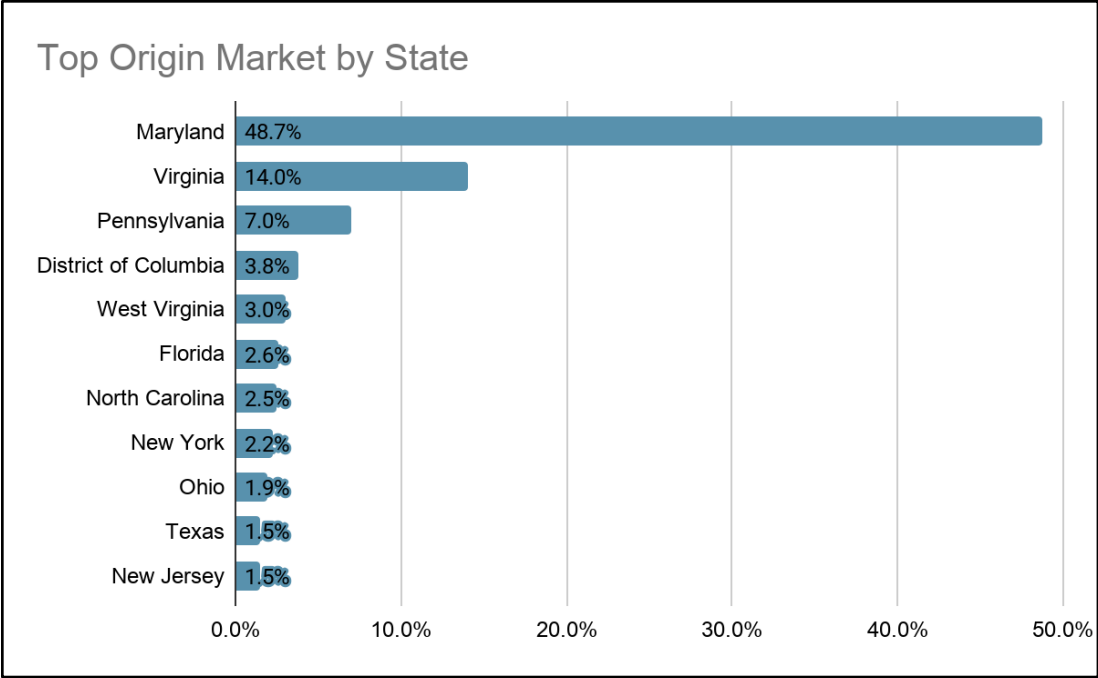


Figure 7: Points of Interest, Zartico, August 2025

These findings are consistent with stakeholder input gathered during the Agricultural Reserve Familiarization Tour, which indicated a mix of local and regional visitors. Visitor movement patterns also demonstrate regional, multi-stop travel behavior. Top cross-visited destinations include Washington, D.C., the City of Gaithersburg, and the City of Rockville, suggesting that trips to the Agricultural Reserve are often combined with visits to nearby urban and suburban centers.⁴⁷

This data indicates that the Agricultural Reserve attracts a steady base of regional visitors, with visitation largely concentrated in short-duration day trip experiences. This pattern may present opportunities to encourage longer stays and greater connectivity between destinations within the Agricultural Reserve.

⁴⁷ Zartico. (2025). Zartico visitor analytics data (Points of interest and visitor trends).

Visitor Demographics or Who is Visiting

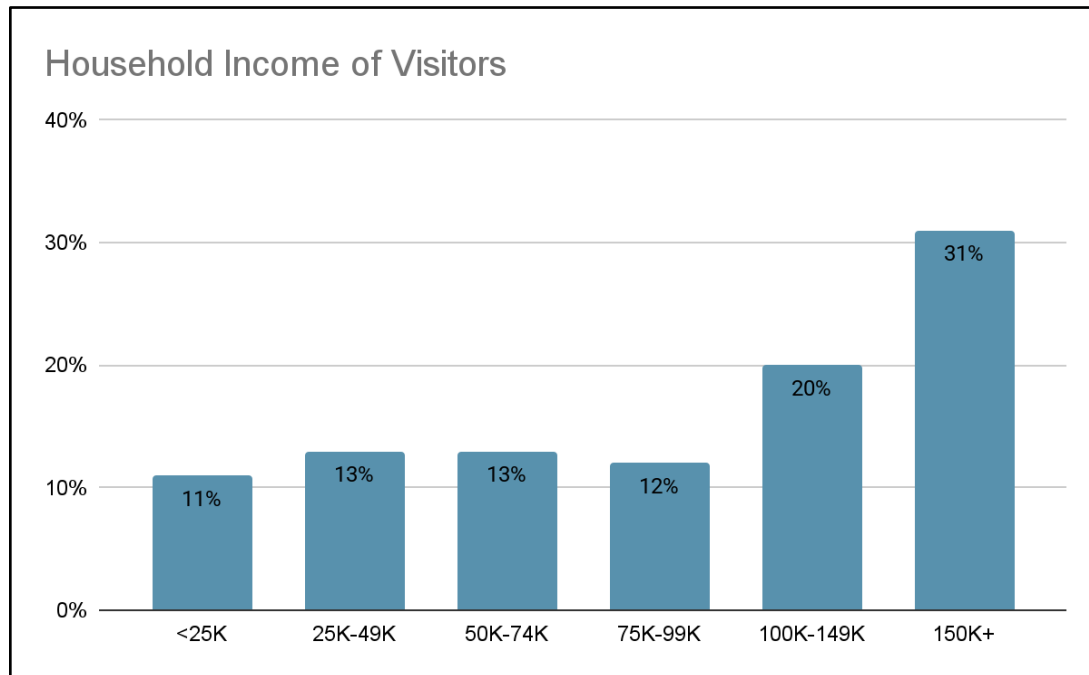


Figure 8: Points of Interest, Zartico, August 2025

Approximately 31% of visitors have a household income exceeding \$150,000 annually, while an additional 20% fall within the \$100,000 to \$149,000 range. Middle income households are also represented, with 12% earning between \$75,000 and \$99,000 and 13% between \$50,000 and \$74,000. Lower income visitors account for a smaller share, with 13% earning between \$25,000 and \$49,000 and 11% below \$25,000. The median household income of visitors is \$111,400⁴⁸, which is significantly higher than the national median household income of \$80,734.⁴⁹

Visitor income data indicates that the Agricultural Reserve attracts a relatively affluent visitor base with strong spending potential. However, this also indicates that access to the Agricultural Reserve and its amenities is not uniform across all populations. Accessing the Reserve can be difficult for those without reliable transportation, including lower income and underserved populations. Improving access through enhanced transportation options, coordinated wayfinding, and digital tools⁵⁰ would help broaden participation and ensure that the benefits of the Agricultural Reserve are more widely shared.

Visitor demographic data indicates that the Agricultural Reserve attracts a diverse but not evenly distributed visitor population. Approximately 64% of visitors identify as White, followed by 15% Black, 6% Asian, 6% identifying as other races, and 8% identifying as

⁴⁸ Zartico. (2025). Zartico visitor analytics data (Points of interest and visitor trends).

⁴⁹ U.S. Census Bureau, American Community Survey (ACS) 5 Year Estimates 2024

⁵⁰ Brand Audit Takeaways Rural Montgomery County, August 28, 2025

two or more races.⁵¹ While this reflects some level of diversity among visitors, the distribution suggests that certain populations may be underrepresented relative to the broader region.

Visitor age distribution reflects broad representation across adult age groups, with a slight concentration among older visitors. Approximately 16% of visitors are aged 65 and older and 14% are aged 55-64, compared to 9% aged 19-24.⁵² This suggests that while the Agricultural Reserve appeals to a wide range of age groups, younger visitors may be less represented. Additional research may help identify opportunities to better understand younger audiences and their interests within the Agricultural Reserve visitor market.

The Agricultural Reserve benefits from consistent regional visitation and a visitor base with strong spending capacity. However, differences in income, age, and demographic representation suggest that there are opportunities to better understand and engage underrepresented audiences in the future.

V. Barriers to Visitation

Barriers ranging from the high-profile closure of critical transit link White’s Ferry to more subtle challenges such as limited/poor signage and limited dining/lodging, create a fragmented experience that often deters potential visitors and limits the economic success of the local small businesses and non-profits that depend on them.

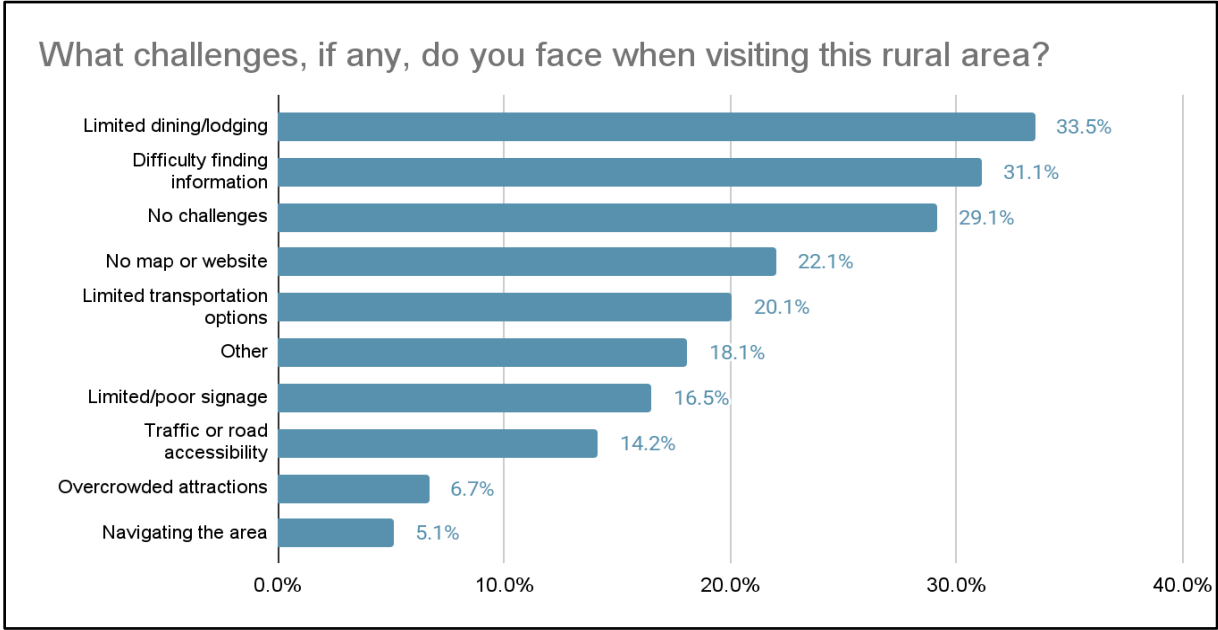


Figure 9: Community Survey, Brand Audit Takeaways, August 28, 2025
Note: The total is greater than 100% due to the ability to select multiple options.

⁵¹ Zartico. (2025). Zartico visitor analytics data (Points of interest and visitor trends).
⁵² Zartico. (2025). Zartico visitor analytics data (Points of interest and visitor trends).

Lack of Unified Information, Signage, and Maps

Survey results indicate that access to information and wayfinding are significant barriers to visitation within the Agricultural Reserve. A total of 31% of respondents reported difficulty finding information about the Agricultural Reserve. Additionally, 22% cited the lack of a centralized map or website to identify destinations, 17% identified inadequate signage as a barrier to visitation, and 5% reported challenges navigating the area.

Collectively, these findings point to a visitor experience in which destinations are difficult to discover and access. Existing signage is limited, inconsistent, and often installed by different private businesses rather than as part of a coordinated system, resulting in gaps in information and overall cohesion. As a result, visitor trips are frequently fragmented, and unintentional trespassing can occur.

Addressing these challenges presents a clear opportunity to improve the visitor experience and support local economic activity. A coordinated wayfinding system, including consistent and branded signage, an easy-to-navigate map (color-coded by activity or interest, including pet-friendly and family-friendly destinations), and a website would enhance navigation, encourage multi-stop visitation, and better connect visitors to businesses and attractions throughout the Agricultural Reserve.⁵³

Traffic

The Montgomery County Rustic Roads Program protects, preserves, and enhances historic, scenic, and agricultural roadways. The program preserves rural character by limiting paving, widening, and road straightening. While the roads are loved for their charm, they can be narrow and do not accommodate a heavy traffic load. Interviews and focus groups identified concerns that increased traffic and associated noise may conflict with active farming operations. Public transportation and shuttle services would help alleviate these concerns and provide transportation for seniors, students and underserved residents in the region. Additionally, van- or bus-based tours can provide opportunities for brewery loops, “making” workshops, or heritage tours. As seen in Figure 9, 20% of visitors surveyed cited limited transportation as a challenge to visiting the Agricultural Reserve.⁵⁴

Accessing the Agricultural Reserve

White’s Ferry, a cable ferry service, historically provided a direct connection across the Potomac River between Loudoun County, Virginia and Poolesville in Montgomery County, Maryland, transporting vehicles, cyclists and pedestrians. Prior to its closure in December 2020, the ferry served nearly 600 to 800 users daily. Operations ceased

⁵³ Brand Audit Takeaways Rural Montgomery County, August 28, 2025

⁵⁴ Brand Audit Takeaways Rural Montgomery County, August 28, 2025

following a prolonged legal dispute between the former owners of White’s Ferry Inc., and the owners of Rockland Farm, which controls the Virginia landing site.

At the time of operation, White’s Ferry was the primary crossing for travelers between Western Montgomery County and Loudoun County. Approximately 83% of travelers from Loudoun County to Montgomery County used the ferry, along with 78% of travelers from Montgomery County to Loudoun County. Most remaining travelers used the Point of Rocks Bridge on U.S. Route 15, while less than one percent used the American Legion Bridge.

Following the ferry’s closure, the Point of Rocks Bridge became the only practical alternative route. This shift resulted in significantly longer travel distances and times for users. Average trip distances increased from 25 miles to over 40 miles, while travel time increased by 6 to 10 minutes per trip.

The loss of White’s Ferry has reduced direct connectivity between the Agricultural Reserve and Northern Virginia, limiting access for visitors, employees, and businesses. Stakeholder input indicated that the closure of White’s Ferry resulted in a noticeable decline, as much as 20%⁵⁵, in visitation and customer activity for some businesses. This has altered regional travel patterns and may continue to affect visitation levels from Virginia-based markets.

As shown in Figure 10, closure of White's Ferry increased both travel distance and travel time for many users.

Measures	With White’s Ferry		Without White’s Ferry	
	Eastbound	Westbound	Eastbound	Westbound
Time (minutes)	58.5	57.2	67.3	63.5
Distance (miles)	24.7	25.0	41.7	42.0
Speed (mph)	25.3	26.6	37.2	39.7

Figure 10: Average Daily Trip Lengths and Miles and Hours of Travel for White’s Ferry Users⁵⁶

Service and Amenities

A barrier to sustainable economic growth in the Agricultural Reserve is the limited availability of visitor amenities and overnight accommodations. Currently, most visitors experience the Reserve as a day trip destination, limiting the region’s ability to capture the additional spending associated with longer stays. While a limited number of short-term rental accommodations exist within and around the Reserve, overnight lodging options remain relatively limited overall. This is reflected in recent data, where 33.5% of surveyed visitors identified limited dining/lodging as their primary challenge when visiting the area, although the survey did not distinguish between the two categories

⁵⁵ Fair Access Committee Overview of Key Issues
⁵⁶ White’s Ferry Operations Alternative Study, October 20, 2021

independently.⁵⁷ Stakeholder input also indicated that infrastructure factors, including water availability in certain areas, should be considered when evaluating future visitor development.

This gap also affects regional competitiveness, as the overnight visitor market in Maryland accounts for the majority of total spending (75.8%) compared to day trip expenditures (24.2%). According to the *Economic Impact of Tourism in Maryland* report, day travelers spent an average of \$187 per trip in 2024, while overnight travelers spent an average of \$876.⁵⁸ During the Agricultural Reserve Familiarization Tour, a local business stakeholder noted that additional overnight accommodations could be beneficial to the area. Expanded lodging opportunities could encourage longer stays, increase spending across multiple businesses, and support repeat visitation.

Recognizing this need, Montgomery County approved Zoning Text Amendment 24-02 in July 2024 to allow limited campground use on qualifying agricultural properties within the Agricultural Reserve as a means of expanding agritourism opportunities while supporting farmland preservation.⁵⁹

Insufficient Public Facilities

There is a lack of public facilities such as restrooms, parking, and other infrastructure needed to support tourism, agricultural education, and historic and cultural resources.⁶⁰ Legislation passed during the 2025 Maryland legislative session may provide additional flexibility for certain agritourism operations by allowing the use of portable sanitation facilities in place of permanent restroom infrastructure.⁶¹

VI. Overall Economic Assessment

The Montgomery County Agricultural Reserve represents a nationally recognized model for farmland preservation, successfully maintaining agriculture as the foundation and primary land use of its rural landscape. However, over time it has evolved into a more complex economic system in which agriculture, tourism, and small businesses are closely linked.

This study finds that the visitor economy can play a critical role in supporting the financial viability of farms and small businesses, with regional visitors drawn to the unique combination of outdoor recreation, agritourism, heritage sites, and authentic rural character. Visitation numbers from the Washington, D.C., and Baltimore markets demonstrate the Agricultural Reserve's position as a desirable regional destination.

⁵⁷ CivicBrand. (2025, August 28). Brand audit takeaways: Rural Montgomery County.

⁵⁸ Economic Impact of Tourism in Maryland, August 2025

⁵⁹ Montgomery Planning. (2024, July 1). ZTA 24-02, Agricultural and Rural Zones - Campground

⁶⁰ Montgomery Planning. (2019). Agritourism study.

⁶¹ Maryland General Assembly. (2025). Food Establishments – Portable Chemical Toilets (SB544/HB559).

Despite these strengths, key barriers such as transportation constraints and fragmented wayfinding limit the Agricultural Reserve's ability to fully capture its economic potential. These challenges present opportunities to enhance visitor experience, increase economic activity, and strengthen the long-term sustainability of the Agricultural Reserve while maintaining its rural character and values. Broad public awareness and engagement with the Agricultural Reserve will also be important to sustaining long-term support for its preservation mission.⁶²

Overall, the Agricultural Reserve possesses significant assets that can support a resilient rural economy in which farming remains the primary use, while complementary visitor and small business activity helps preserve farmland and foster economic vitality. Addressing existing barriers and expanding opportunities will require continued coordination, strategic investment and planning, and long-term commitment from public, private, and community stakeholders.

VII. Recommendations for Areas of Future Focus

The recommendations below identify areas where additional coordination, investment, research, planning and programmatic support may strengthen the Agricultural Reserve while maintaining its agricultural preservation mission. The recommendations below are intended to strengthen the Agricultural Reserve while recognizing that agriculture remains its primary purpose and that a diverse agricultural economy is essential to its long-term viability.

- Support for tourism and visitor-related activities that remain compatible with the Agricultural Reserve's agricultural preservation mission, rural character, and sense of place, ensuring that future growth in visitation occurs at a scale that maintains the authenticity and community character valued by residents and visitors.
- Continued review and clarification of agritourism definitions, regulations, and guidance in collaboration with the farming community to improve understanding and consistency as agricultural business models and visitor experiences evolve, while maintaining agriculture as the primary use of the Agricultural Reserve.
- Continued coordination among local organizations involved in agriculture, tourism, preservation, economic development, planning, and policy to support marketing, tourism, and destination development efforts within the Agricultural Reserve.
- Development of a coordinated wayfinding and visitor information system, including branded maps with suggested routes, signage, and digital resources to improve navigation and visitor awareness of Agricultural Reserve destinations.

⁶² Fair Access Committee. (2024, January 16). Comments to the Montgomery County Council.

- Continued studies and data collection, by local agencies and organizations, related to visitor behavior, economic impacts, and tourism trends within the Agricultural Reserve.
- Additional research, led by a local agency or organization, to better understand the interests, preferences, and visitation patterns of underrepresented visitor groups in order to inform future marketing, programming, and visitor experiences.
- Additional study, led by a local agency or organization, to better understand demand for overnight accommodations within the Agricultural Reserve visitor market and, if warranted, development of a feasibility study to evaluate potential locations, infrastructure considerations, and compatibility with the goals of the Reserve.
- Marketing and promotion of the Agricultural Reserve as a regional destination for agritourism, outdoor recreation, heritage tourism, and craft beverages, including greater visibility for tastings, festivals, seasonal events, and other visitor experiences.
- Target outreach and marketing efforts to increase awareness of the Agricultural Reserve among nearby urban audiences, particularly within the District of Columbia, to strengthen regional visitation and day-trip opportunities.
- Expansion of cooperative marketing and cross-promotional initiatives among farms, craft beverage operations, tourism organizations, and small businesses to encourage regional visitation and connected visitor experiences.
- Continued support for community amenities, placemaking initiatives, and recreational and cultural assets within towns and rural communities connected to the Agricultural Reserve that enhance the quality of life of residents and support visitor activity.
- Exploration of transportation and mobility initiatives, including shuttle services and group tours, that could improve accessibility to the Agricultural Reserve for visitors, seniors, students, and underserved populations while reducing traffic impacts on rural roads.

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