



Maryland
OFFICE OF TOURISM



Fiscal Year 2023 Tourism Marketing and Development Plan

MARYLAND TOURISM DEVELOPMENT BOARD AND THE OFFICE OF TOURISM DEVELOPMENT

Table of Contents



Chair’s Letter	3
How To Use This Marketing Plan	4
Situational Analysis	
Open: Fiscal Year 2023 Marketing Plan	5
Annual OTD Marketing Plan Visitor Profile	10
Trends and Comparisons.....	11
Visitor Profile: Where do they come from and where do they go?	13
What Do Our Visitors Do?	29
Departments	30
Strategic Objectives	
Maximizing Opportunities.....	31
Leveraging Partnerships	33
Market Expansion	35
Transactional Outcomes.....	37
Events Calendar	38
OTD Checklist	39

Chair's Letter



It's been a year of change and growth. As Chair of the Maryland Tourism Development Board, I want to thank you for continuing to provide a positive Maryland tourism experience to our customers. As we continue to rebuild the tourism landscape in Maryland, our marketing plan continues to evolve to reflect this.

As we enter a new fiscal year, on behalf of the Maryland Tourism Development Board, I would like to thank Governor Hogan for his continuing support of the tourism industry in Maryland. We appreciate his strong support showcased by the record funding for the Maryland Tourism Development Board of \$12.6 million for fiscal year 2023. With the Governor's leadership, the Maryland Department of Commerce and the Office of Tourism have the opportunity to highlight tourism's role in creating economic benefit for the citizens of Maryland through customer spending, and the amenities that the tourism industry brings to the state for both its residents and its visitors.

This work plan has been developed by the staff of the Maryland Office of Tourism with the support of the Maryland Tourism Development Board. It serves

as a master plan for all staff activities and programs in the upcoming fiscal year. And it introduces some of the important new partnership initiatives that will drive our endeavors in the coming year, including helping tourism-related businesses and partners in their path to recovery. Some of those initiatives include continuing to promote Maryland as the Most Powerful Underground Railroad Storytelling Destination in the World, touting our Trail System Second-to-None, and the Chesapeake Bay Storytellers program.

I am proud of this board's continuing work with the Office of Tourism, and am pleased to present the Fiscal Year 2023 Tourism Marketing and Development Plan. The objectives and strategies in this plan are designed to enhance tourism's positive impact in Maryland.

The board and I look forward to working with you, our tourism industry partners, to continue to increase Maryland's tourism expenditures, tax revenues and job opportunities.

Sincerely,

A handwritten signature in cursive script that reads "Judy Long Bixler".

Judy Long Bixler

Chair, Maryland Tourism Development Board
Owner/Captain, Oxford Bellevue Ferry



How To Use This Marketing Plan



The first part of this marketing plan details our annual situational analysis, including visitor statistics, industry insights, lodging trends, and product and visitor analyses. The marketing plan is developed based on research from a variety of sources, including D.K. Shifflet, Longwoods International, Smith Travel Research, Tourism Economics, Rockport Analytics, and Destination Analysts.

The Maryland Office of Tourism measures its programs against four strategic objectives:

- MARKET EXPANSION
- LEVERAGING PARTNERSHIPS
- MAXIMIZING OPPORTUNITIES
- TRANSACTIONAL OUTCOMES

Each department within the Office of Tourism Development has outlined their strategies within these four strategic objectives in the plan.

Situational Analysis



Open: Fiscal Year 2023 Marketing Plan

Marketing plans have always been organic documents, which provide organizations with a road map that is marked by opportunities that might become available or building upon previously tried and successful approaches. Over the past year, we have witnessed a gradual return to normalcy on the travel landscape—a marked improvement over the previous two years.

The Maryland Office of Tourism continues to market travel to the state with our “Maryland: OPEN” branding, and saw real success in website visits, social media engagement, public relations outreach, and working with the industry to continue to develop stakeholder engagement. We continue to develop stakeholder engagement with the industry through the Welcome Centers and call center program, and by providing industry trainings to better serve the traveling public.

This marketing plan has been built with an eye toward the future using knowledge gleaned over the last year. We never stopped building upon “The Big Five”: The Most Powerful Underground Railroad Storytelling Destination in the World; The Great Chesapeake Bay Loop and Chesapeake Bay Storytellers program; our Trail System Second-to-None; the Open Roads Scenic Byways program; and Fish & Hunt Maryland.

It turns out that the “Big Five” and the “OPEN” campaign resonate with actions and values that our consumers find meaningful – that learning lessons from the past makes for a better tomorrow, that outside is better than inside, and that the road trip will continue to drive visitation.

The challenge is that as travelers get ready to go, many destinations are competing for those dollars. Many tourism entities are doubling down on advertising. Virginia and New York continue to spend at an enormous rate to drive visitation. Destination advertising is running constantly across broadcast and connected TV, streaming, digital, print and terrestrial and satellite radio and they are targeting the same consumers as Maryland. Maryland is a highly desirable destination with its natural and cultural assets and tourism marketing remains a competitive landscape.

The unpredictability of the landscape over the past two years has increased OTD’s forecasting and research needs in order to gauge future expectations for Maryland’s visitor economy, and to inform tourism industry leaders to make strategic decisions. Over the past year, in order to “take the temperature” of the travel consumer, as well as to plan our marketing efforts effectively, we developed and executed the Maryland Travel & Tourism Predictive Analysis Study (TPPA).

Situational Analysis



Giovanni Vargas

Open: Fiscal Year 2023 Marketing Plan

This TTPA analysis was developed to:

- Understand the potential future of tourism in a post-pandemic environment to develop recovery insights, trends and forecasts.
- Identify the target segments and origin markets most likely to travel to Maryland, and which region(s) they are most likely to visit.
- Prove the economic value of tourism to the state of Maryland and its regions, including tax revenues.
- Guide marketing and strategic decisions.

The scope of the project included three methods to accomplish our research goals: employment of the Symphony Dashboard by Tourism Economics; travel-intent surveys in Maryland's target markets; and an Engaged Traveler Segmentation Survey of visitors who receive information from Maryland Destination Marketing Organizations.

The Marketing for the Maryland Tourism Development Plan Board and the Office of Tourism is grounded in research that is either open source or procured by the Office of Tourism.

As the tourism industry continues its rebound, a new set of challenges has appeared on the horizon: supply chain, inflation, workforce recruitment and retention, and waning consumer confidence is more challenging in this environment.

“Purchasing intentions for cars, homes, and major appliances held relatively steady—but intentions have cooled since the start of the year and this trend is likely to continue as the Fed aggressively raises interest rates to tame inflation. Meanwhile, vacation plans softened further as rising prices took their toll. Looking ahead over the next six months, consumer spending and economic growth are likely to continue facing strong headwinds from further inflation and rate hikes.”

- The Conference Board Consumer Confidence Index® June 2022

Situational Analysis



Open: Fiscal Year 2023 Marketing Plan

Since March of 2020, the Maryland Office of Tourism has continued its marketing programs, embarked on consumer research projects and developed new promotional and experiential programs such as Tubman 200, a commemoration of Harriet Tubman's birth and cornerstone of Maryland's identity as "The Most Powerful Underground Railroad Storytelling Destination in the World." Additionally, the counties that are adjacent to the C&O Canal worked together to produce a cooperative marketing program to encourage consumers to take part in the C&O Canal Experience as one of the state's "Trail System Second-to-None."

We also continued building upon one of Maryland's legacy products, our 18 Scenic Byways, one-third of which are officially recognized by the Federal Highway Administration as National Scenic Byways. Research is demonstrating that investment in our byways has been and will continue to be a major component of our marketing strategy.

2022 Road Trip Survey - Insights

1. The road trip market has changed – for the better.
2. Road trip visitors are a vital market.
3. Road trips are continuing to grow market share.
4. Thematic itineraries and curated activities attract road trip visitors.
5. Road trips itineraries are better beyond a single destination.
6. Road trip promotion and tactics should be updated to include today's new technologies.
7. Destinations target road trip visitors as a specific segment.

Situational Analysis

Open: Fiscal Year 2023 Marketing Plan

The Maryland Office of Tourism will continue to build upon its experience from the past to build for the future. During past market hardships, visitation to Maryland continued to increase despite rising gas prices, the Great Recession and other instances of economic turmoil. This resilience can be partially attributed to six of the most affluent counties in the country being located within 200 miles of the state, an easy road-tripping distance.

COUNTIES IN THE U.S. WITH MEDIAN HOUSEHOLD INCOMES OF \$100,000 OR MORE		
COUNTY	STATE	2019 HOUSEHOLD INCOME, FORBES, DECEMBER 2021
Loudoun County	Virginia	\$142,299
Fairfax County	Virginia	\$124,831
Santa Clara County	California	\$124,055
San Mateo County	California	\$122,641
Los Alamos County	New Mexico	\$121,324
Howard County	Maryland	\$121,160
Arlington County	Virginia	\$120,071
Douglas County	Colorado	\$119,730
Nassau County	New York	\$116,100
Morris County	New Jersey	\$115,527

Source: Forbes

Situational Analysis



Open: Fiscal Year 2023 Marketing Plan

Nationally, the average state tourism budget is \$22.4 million. The Fiscal Year 2023 budget for the Maryland Tourism Development Board is \$12.6 million. The Tourism Promotion Act legislated that \$2.5 million be distributed to the Destination Marketing Organization in each county and Ocean City. The remainder—representing the state’s purchasing power—is \$10 million.

COMPETITIVE STATE TOURISM MARKETING BUDGETS	
STATE	MARKETING BUDGET
Florida	\$54,456,106
West Virginia	\$23,467,111
Puerto Rico	\$17,600,000
South Carolina	\$14,052,826
Virginia	\$8,487,000
Maryland	\$10,058,800
Massachusetts	\$5,031,600
Delaware	\$1,000,000

Within this competitive marketplace, many other destinations are vying for consumers with the highest median incomes in the nation. Many of these destinations are in our media market footprint while we are doing the same in theirs.

Jurisdictional authorities are also navigating the pandemic’s devastating effect on the tourism industry—and the accompanying decrease in sales-tax revenue. Some states reacted by slashing tourism budgets while others, such as Maryland, continue to invest in tourism marketing and promotion. Marketing programs and associated metrics have shown that for every dollar spent on the aggressive promotion of Maryland as a destination \$31 is returned to the state’s economy.

The MediaRadar report also shows there has been a 46 percent year-on-year increase in DMO ad spend compared to the same period last year. According to the report, the California Travel and Tourism Commission, Charleston Area Convention & Visitors Bureau, Monroe County Tourist Development Council, Orlando/Orange County Convention & Visitors Bureau, VISIT FLORIDA and Williamsburg Tourism Council have all invested more than \$5 million in ad spend so far in 2022, totaling more than \$58 million combined.

Situational Analysis

Annual OTD Marketing Plan Visitor Profile

Throughout this marketing plan, you will learn how the team will continue to build upon prior success, remain alert to sustainable trends, build product offerings that differentiate Maryland and market Maryland effectively and efficiently. We will build upon initiatives that were successful, evaluate new opportunities and continue to show our value to stakeholders through marketing strategies that drive overnight visitation.

Maryland welcomed nearly 35 million domestic travelers (based on person-trips measurement) with total direct spending \$13.6 billion from domestic travelers, according to a national survey of U.S. travelers conducted by D.K. Shifflet & Association, a leading tourism industry research firm. The direct spending increased 65.6 percent compared to 2020. Eighty-six percent, or more than 30 million, were leisure travelers and the remaining 14 percent, or 4.9 million, were business travelers. Overnight travelers represent 43 percent of the state’s total visitation, or 15.1 million. In 2021, the tourism industry showed some resilience, both the leisure and the overnight travel segments increased. Maryland’s visitor volume increased 42.5 percent outpacing the national level by more than 10 percent. At the national level, there was a 33.7 percent increase in visitor volume.

Person-Trips: A person-trip is any trip taken to a unique geography (national or state level). It counts the total number of people on a single trip by the number of trips but does not count the number of destinations visited on a trip.



D.K. Shifflet defines a visitor as either someone visiting overnight or someone who travels 50 miles or more from their home outside of their daily activity

Maryland outpaced the national visitor volume by nearly 9 percent.

VISITOR VOLUME ESTIMATES (PERSON-TRIPS IN MILLIONS)								
	MARYLAND			% CHANGE	U.S.			% CHANGE
	2019	2020	2021	2021 VS 2020	2019	2020	2021	2021 VS 2020
TOTAL	41.2	24.5	35.0	42.5%	2,984.2	2,124.6	2,840.6	33.7%
BUSINESS	6.3	3.4	4.9	44.8%	566.6	343.0	543.4	58.4%
LEISURE	35.0	21.2	30.1	42.2%	2,417.7	1,781.6	2,297.2	28.9%
DAY	22.3	13.2	19.8	50.4%	1,638.6	1,244.9	1,636.8	31.5%
OVERNIGHT	18.9	11.3	15.1	33.4%	1,345.6	879.7	1,203.8	36.8%

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System, based on person-trips

Situational Analysis



Trends and Comparisons



National travel volume increased 33.7 percent compared to 2020. The total domestic U.S. visitor volume, as measured in person-trips, reached 2.84 billion in 2021, 716 million more visitors compared to 2020.

Leisure travel represented 80.9 percent of all person-trips, with day trips representing 57.6 percent and overnight 42.4 percent of visitor volume.

In 2021, the breakdown of visitors to Maryland by day and overnight travel segments (based on person-trips) was similar to that of the national level (56.7 percent day and 43.3 percent overnight); nevertheless, the share of the state’s leisure travel segment was larger than the national share (86 percent vs 80.9 percent). This share has been consistent over past years. In terms of spending, leisure travelers contribute 78.6 percent (\$10.7 billion) to Maryland’s total spending (\$13.6 billion) in 2021, up about 67 percent respectively compared to 2020. Business travel, spending \$2.9 billion in 2021, up more than 60 percent compared to 2020.

In person-stays metrics, there was a total 44.1 percent increase in the state compared to 2020, 7 percent higher than the average U.S. destination (36.9 percent). Maryland kept the same level of growth with D.C. and DE, exceeding competitor states PA, VA, and WV in 2021. In Q2, person-stays in Maryland jumped more than 100 percent compared to the same period in 2020, continuing to rise in Q3 and Q4 (57.2 percent and 51.4 percent). Leisure and business travel followed a similar pattern, increasing 47.6 percent and 25.7 percent on average in 2021.

Maryland’s overnight visitation outpaced most of its regional competitors.

COMPETITOR VISITATION VOLUME PERCENT CHANGE							
Travel Segment	U.S.	MD	D.C.	DE	PA	VA	WV
TOTAL	36.9%	44.1%	44.2%	44.4%	31.6%	30.5%	25.6%
BUSINESS	28.7%	25.7%	31.9%	27.7%	15.5%	11.5%	7.0%
LEISURE	38.5%	47.6%	50.7%	47.6%	34.3%	35.8%	28.6%
DAY	39.2%	49.2%	n/a	n/a	36.0%	27.3%	22.5%
OVERNIGHT	34.6%	37.3%	40.3%	39.0%	26.3%	33.4%	30.6%

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System, based on person-stays

Situational Analysis

Trends and Comparisons

Competitor Visitation Volume - 2021 and Competitor Visitation Volume - 2020 below this Competitor Visitation Volume Percent Change (see below):

COMPETITOR VISITATION VOLUME - 2021							
	U.S.	MD	D.C.	DE	PA	VA	WV
	YE 2021	YE 2021	YE 2021	YE 2021	YE 2021	YE 2021	YE 2021
TOTAL	3,565.56	49.34	18.84	13.21	136.08	80.44	22.29
BUSINESS	549.06	6.86	5.91	1.90	17.17	15.02	2.60
LEISURE	3,016.50	42.48	12.93	11.30	118.91	65.42	19.70
DAY	1,860.23	29.18	n/a	n/a	76.39	37.93	13.40
OVERNIGHT	1,705.33	20.16	12.08	6.37	59.70	42.51	8.89

COMPETITOR VISITATION VOLUME - 2020							
	U.S.	MD	D.C.	DE	PA	VA	WV
	YE 2020	YE 2020	YE 2020	YE 2020	YE 2020	YE 2020	YE 2020
TOTAL	2,603.84	34.24	13.06	9.15	103.42	61.64	17.75
BUSINESS	426.48	5.46	4.48	1.49	14.87	13.47	2.43
LEISURE	2,177.36	28.79	8.58	7.66	88.55	48.18	15.32
DAY	1,336.72	19.56	n/a	n/a	56.17	29.78	10.94
OVERNIGHT	1,267.11	14.69	8.61	4.58	47.25	31.86	6.81

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System, based on person-stays

Situational Analysis



Visitor Profile: Where do they come from and where do they go?

For the purpose of conversation with our customers, Maryland is broken down into five regions, which are outlined below, the share of visitation.

Person-Stays: The person-stays weight counts the total number of people on a stay, regardless of the length of their stay at a destination. This measure equates to the total number of people on a trip times the number of stays on a trip.

SHARE OF MARYLAND VISITATION				
MARYLAND DESTINATION REGIONS		2019	2020	2021
CENTRAL REGION	Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, and Howard counties	55.2%	30.3%	59.1%
EASTERN SHORE	Caroline, Cecil, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico, and Worcester counties	18.8%	37.9%	18.5%
CAPITAL REGION	Frederick, Montgomery, and Prince George's counties	17.5%	20.9%	16.0%
WESTERN MARYLAND	Allegany, Garrett, and Washington counties	5.1%	8.2%	3.3%
SOUTHERN REGION	Calvert, Charles, and St. Mary's counties	3.4%	2.7%	3.1%

Source: D.K. Shifflet & Associates, Ltd. with independent analysis by the Maryland Office of Tourism based on person-stays

Situational Analysis

Visitor Profile: Where do they come from and where do they go?

DMA visitor volume is based on person-stays. Total visitor volume in 2021 was 49.3 million in Maryland.

Person-Stays: The person-stays weight counts total number of people on a stay, regardless of the length of their stay at a destination.

DMA VISITOR VOLUME				
	2021		2020	
	% OF VISITORS TO MD	TOTAL VISITOR NUMBER (MILLIONS)	% OF VISITORS TO MD	TOTAL VISITOR NUMBER (MILLIONS)
Washington D.C. (Hagerstown, MD)	26%	12.95	40%	13.81
Baltimore, MD	24%	11.75	19%	6.55
Philadelphia, PA	8%	4.05	10%	3.40
Pittsburgh, PA	6%	3.17	4%	1.33
New York, NY	6%	3.09	4%	1.25

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System, based on person-stays

New York and Pittsburgh increased person stays by 2 percent.

Situational Analysis



Visitor Profile: Where do they come from and where do they go?

The top two destinations visited in Maryland are Baltimore and Ocean City. The chart details numbers of visitors, average travel party size, trip length, spending per trip, and top feeder markets for those two destinations and for Maryland overall.

MD/OC/BALTIMORE SHARES							
2021		MARYLAND		BALTIMORE		OCEAN CITY	
Estimated Share of Visits				31.3%		10.8%	
Estimated Person-Stays (Millions)		49.34		15.44		5.33	
Average Travel Party Size		1.79		1.75		2.29	
Average Length of Stay		1.17		.092		2.10	
Average Pending per Person per Day		\$208.62		\$297.14		\$153.54	
Spending in MD per Travel Party		\$435.88		\$477.95		\$740.23	
TOP 3 DMAS OF ORIGIN							
MARYLAND		BALTIMORE		OCEAN CITY			
Washington, D.C.	26%	Washington, D.C. (Hagerstown, MD)	31%	Harrisburg-Lancaster-Lebanon-York, PA	22%		
Baltimore, MD	24%	Baltimore, MD	20%	Baltimore, MD	16%		
Harrisburg-Lancaster-Lebanon-York, PA	8%	Harrisburg-Lancaster-Lebanon-York, PA	10%	Philadelphia, PA	15%		

Source: D.K. Shifflet and Associates, Ltd., with independent analysis by the Maryland Office of Tourism
Due to rounding, the total might not sum.

Situational Analysis

Visitor Profile: Where do they come from and where do they go?

WHERE DO OUR VISITORS COME FROM?

DAY TRIP V. OVERNIGHTS – TOP STATES OF ORIGIN			
TOP 5	DAY	TOP 5	OVERNIGHT
Maryland	53%	Maryland	26%
Pennsylvania	17%	Pennsylvania	18%
Virginia	10%	Virginia	10%
Delaware	5%	New York	6%
New York	4%	New Jersey	5%

- About 90 percent of day travelers come from Maryland and bordering states while 65 percent of overnight travelers come from these same states.
- Overnight travelers are a little more diversified with 13 percent coming from “longer” haul states such as Ohio, North Carolina, South Carolina and Michigan.



Situational Analysis



Visitor Profile: Where do they come from and where do they go?

Maryland offers visitors and residents a range of vacation experiences. In addition, Maryland's mid-Atlantic location and moderate climate offer visitors the best of all four seasons and a host of year-round outdoor activities.

ACCESS

Five interstate highways and several improved national highways provide easy access within a 400-mile radius. There is excellent rail service from major cities throughout the northeast corridor and points north and south. Baltimore/Washington Thurgood Marshall International Airport (BWI) and three regional airports provide outstanding air service. Additionally, many Maryland destinations are accessible by boat and bicycle.

VOICE OF THE VISITOR

Combines data from the Engaged Traveler Survey of DMO engaged travelers (ETS) and the Travel Intent Survey (TIS) of general population leisure travelers in eight markets.

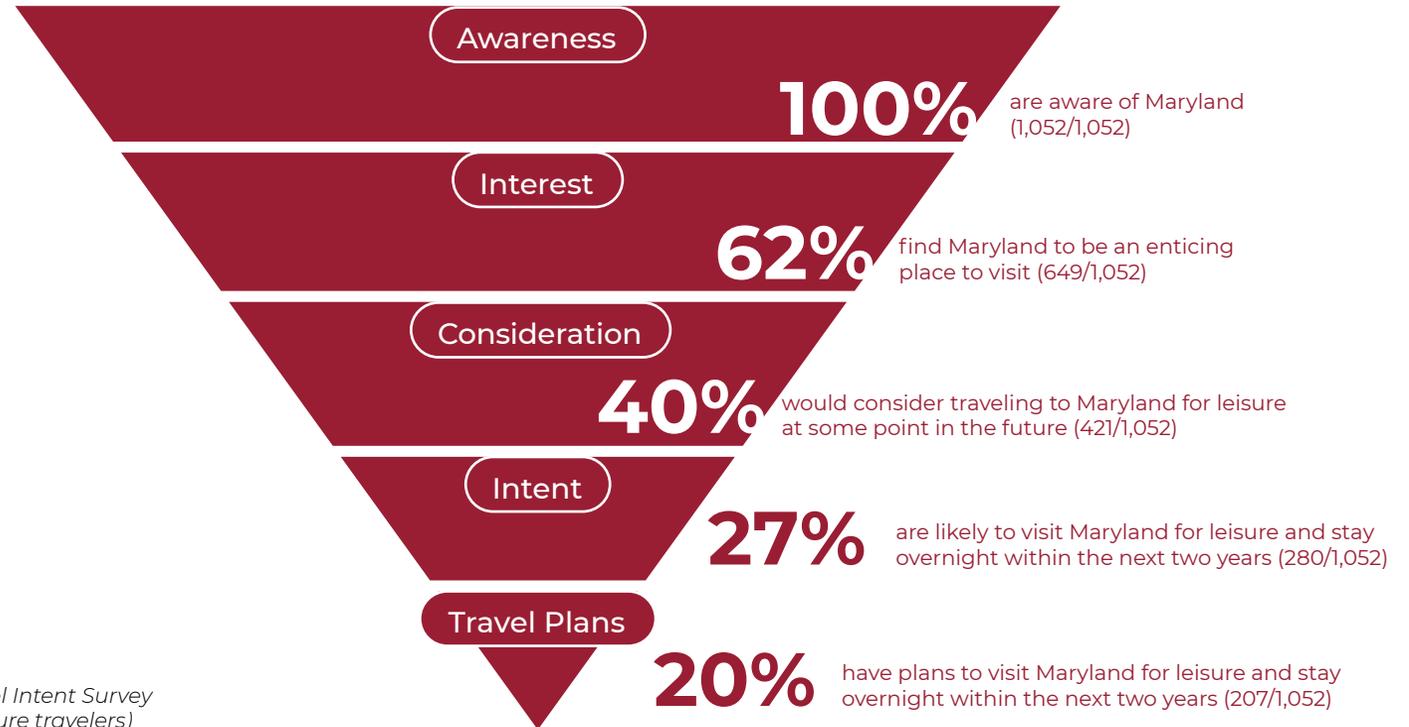
Situational Analysis



Visitor Profile: Where do they come from and where do they go?



MEASURING TRAVEL INTENT



Source: Travel Intent Survey
(random leisure travelers)

Situational Analysis



Visitor Profile: Where do they come from and where do they go?

LIKELY TO VISIT (INTENT)

- TIS respondents were more than likely to visit Maryland than Virginia, D.C., and Delaware
- They were less likely to visit Maryland than New York and Pennsylvania



LIKELY TO VISIT OVERNIGHT FOR LEISURE WITHIN TWO YEARS			
	NOT LIKELY	I MAY OR MAY NOT VISIT	LIKELY
New York	3%	22%	75%
Pennsylvania	2%	24%	74%
Maryland	4%	28%	68%
Virginia	5%	30%	65%
District of Columbia	6%	33%	61%
Delaware	9%	38%	53%

Source: Travel Intent Survey (random leisure travelers)

Q: For each of the states listed below that you would consider for a leisure trip, how likely is it that you would visit that state and stay overnight within the next two years?

Situational Analysis

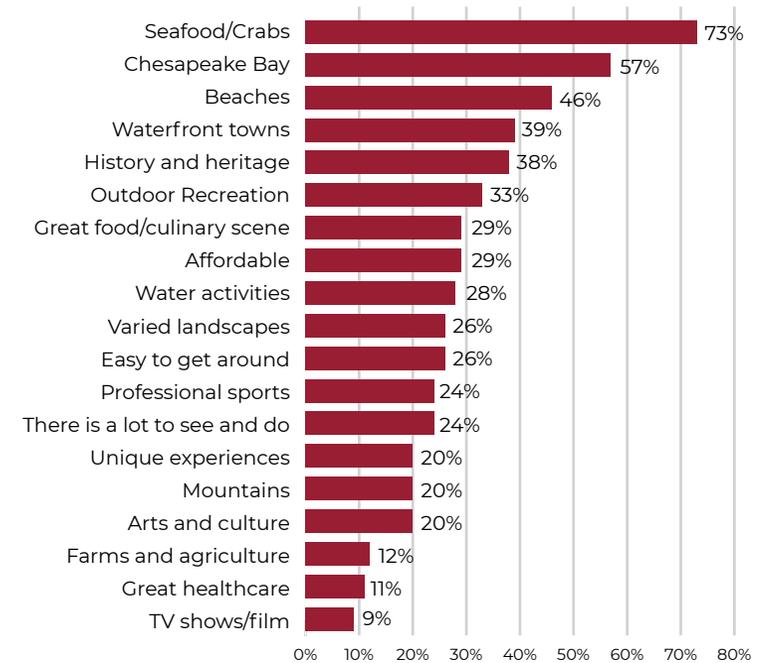


Visitor Profile: Where do they come from and where do they go?



RESPONDENT PERCEPTIONS

- Unaided, TIS respondents tended to describe Maryland in terms of destinations and associations:
 - Baltimore
 - Ocean City
 - Annapolis
 - Crabs/crabcakes/seafood
 - Ocean
 - Mountains
 - Beaches
 - Fun
 - History/historical
- When given a list, they tended to associate Maryland with seafood/crabs (73%), Chesapeake Bay (57%), and beaches (46%).



Source: Travel Intent Survey (random leisure travelers, all)

Q: Today we will be talking specifically about the state of Maryland. Please share 3 words or phrases that first come to mind when you think of the state of Maryland overall.

Q: Which of the following come to mind when you think of the state of Maryland overall? Please select all that apply.

Situational Analysis

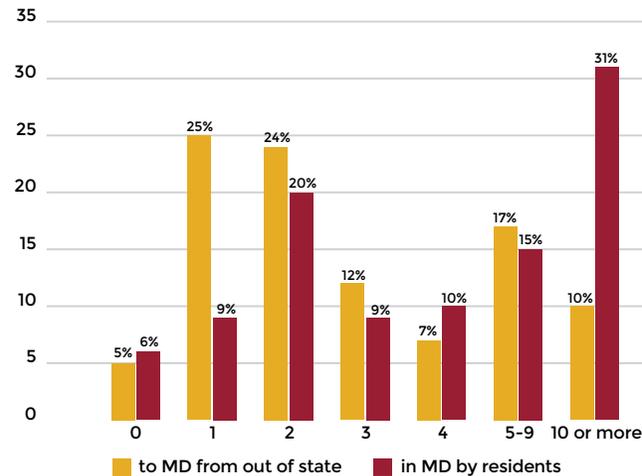


Visitor Profile: Where do they come from and where do they go?

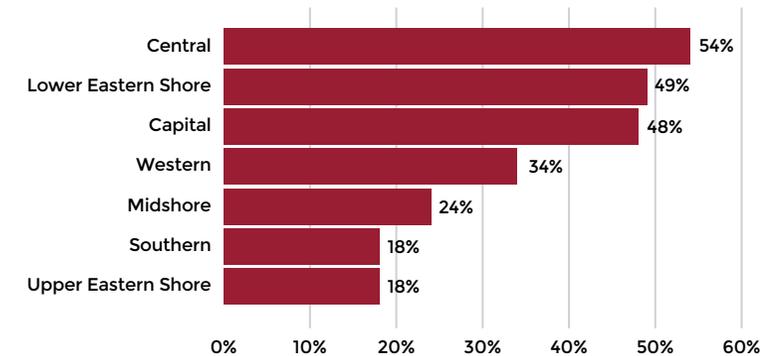
VISIT BEHAVIORS: PAST AND FUTURE

- 44 percent of respondents have traveled for leisure in Maryland in the past.
 - Maryland residents have made more overnight leisure trips than those that live out of state—nearly a third have made 10 or more trips.
 - Half of out-of-state respondents have made 1-2 overnight leisure trips to Maryland.
 - Visitors were most likely to visit the Central Region (54 percent), the Lower Eastern Shore (49 percent), and the Capital Region (48 percent).

OF PAST OVERNIGHT LEISURE TRIPS TO MD



OF PAST OVERNIGHT LEISURE TRIPS TO MD



Source: Travel Intent Survey (random leisure travelers, past MD visitors)

Q: For the following list, please indicate if you have ever traveled for leisure in that state.

Q: You mentioned you had traveled to Maryland for leisure in the past. How many times have you visited Maryland in the past where you stayed overnight in paid accommodations?

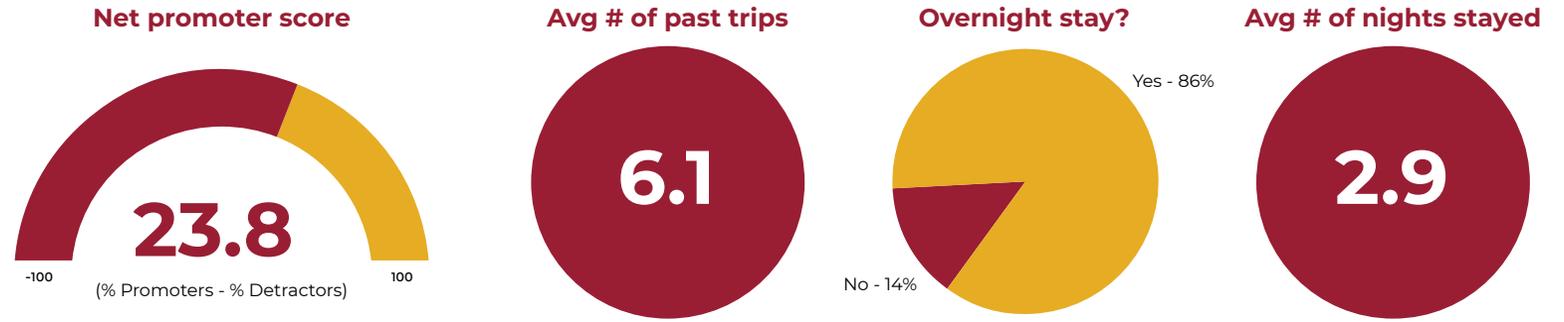
Q: In the map below, the state is divided into seven (7) major regions. Please click on the regions you have visited in the past, turning each green. Select all that apply.

Situational Analysis

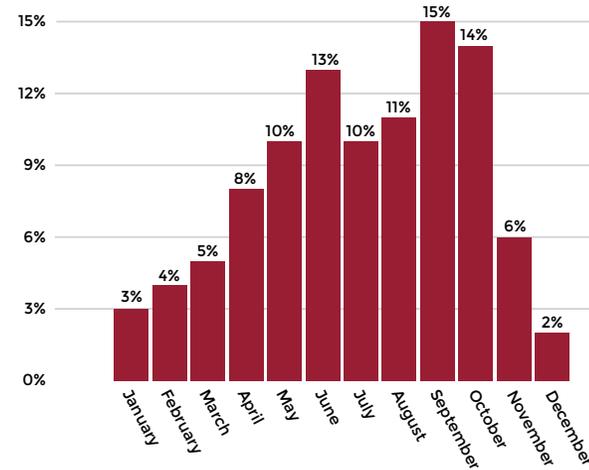


Visitor Profile: Where do they come from and where do they go?

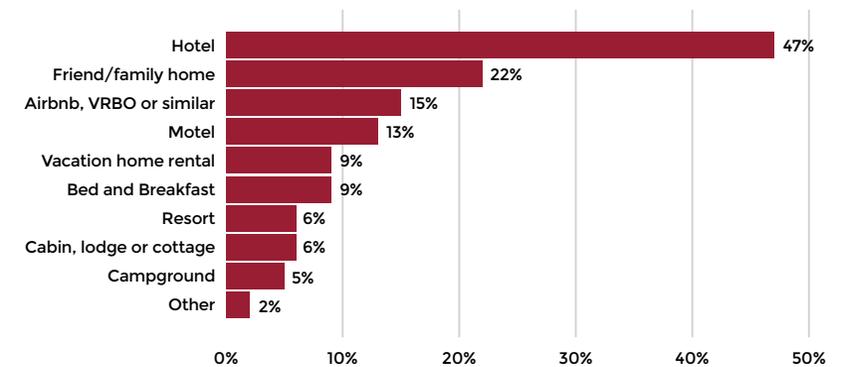
STATEWIDE PAST VISITORS*



MONTH OF MOST RECENT VISIT



LODGING FOR MOST RECENT VISIT



Source: Engaged Traveler Survey (travelers responding via DMO), weighted by 2019 visitor volume

*TIS research also included respondents that were gleaned from individuals from individual DMO survey outreach.

Net Promoter Score is used in market research and asks respondents to rate the likelihood that they would recommend a company, product, or a service to a friend or colleague.

Situational Analysis



Visitor Profile: Where do they come from and where do they go?

MARYLAND VISITOR ANALYSIS

TRAVEL DECISION MAKER/TARGET AUDIENCE DEFINITIONS

Historically, women are the travel decision makers — if not the final decision makers. They generally determine which destinations are in the consideration set. Maryland's media buys are targeted to adults 25–64 but with a strong skew to women; household income (HHI) \$75,000+; well-educated; and working in managerial and professional occupations. They have made a trip on average about one day's duration within the United States in the past 12 months, which includes business, vacation, weekend travel and short trips.

The following tables compare the demographics and trip profiles for Maryland day-trippers and overnight travelers based on person-stays weight.

Day trip: any journey for business or pleasure, outside your community and not part of your normal routine, that did not include an overnight stay. Day trips involve travel of more than 50 miles from home.

Overnight trip: any journey for business or pleasure, outside your community and not part of your normal routine, where you spent one or more nights away from home.

Person-Stays: The person-stays weight counts total number of people on a stay, regardless of the length of their stay at a destination.

Situational Analysis

Visitor Profile: Where do they come from and where do they go?

DAY TRIP V. OVERNIGHTS – INDIVIDUAL		
	DAY	OVERNIGHT
GENDER		
MALE	51%	50%
FEMALE	49%	50%
AGE		
18 - 34	23%	22%
35 - 49	25%	24%
50 - 64	27%	32%
65+	25%	22%

DAY TRIP V. OVERNIGHTS – TRIP SIZE		
HOUSEHOLD SIZE	DAY	OVERNIGHT
1 Member	8%	12%
2 Members	44%	39%
3 Members	16%	20%
4 Members	22%	23%
5+ Members	10%	6%
Children Present in Travel Party	24%	26%

- Males and females have equal percentages of overnight trips while males make up a slightly larger percent of day trips.
- Each age group represents about 25 percent of the total share of day trips.
- Visitors aged 50-64 represent the largest share of overnight trips (32 percent).
- More than half of all day trip visitors (52 percent) are aged 50 or older and they represent more than half of overnight trips (54 percent) as well.

- Two-member parties take the large share of day trips (44 percent) and overnight trips (39 percent).
- 48 percent of day trips and nearly 50 percent of overnight trips are taken by households with three or more members.
- Approximately 25 percent of households traveling to Maryland with children.

Situational Analysis



Visitor Profile: Where do they come from and where do they go?

DAY TRIP V. OVERNIGHTS – INCOME		
INCOME	DAY	OVERNIGHT
Under \$50K	26%	21%
\$50K-\$74.9K	14%	16%
\$75K-\$99.9K	13%	20%
\$100K-\$149.9K	21%	15%
\$150K+	27%	27%

- Visitors to Maryland are affluent with 27 percent of visitors having a household income of \$150,000 or more. Households with an annual income greater than \$75,000 comprise over 60 percent of visitors.

DAY TRIP V. OVERNIGHTS – MARITAL STATUS		
MARITAL STATUS	DAY	OVERNIGHT
Married/Partnered	75%	74%
Never Married	18%	15%
Divorced/Widowed	7%	11%

- Most of the day and overnight trips (74 percent) are taken by married or partnered individuals.

DAY TRIP V. OVERNIGHTS – EDUCATION		
EDUCATION LEVEL	DAY	OVERNIGHT
High School Graduate	13%	22%
Some College	32%	26%
College Graduate	25%	23%
Post-Graduate	26%	25%

- Visitors to Maryland are well educated, more than 50 percent of day and overnight visitors have at least a college degree. Nearly 80 percent of visitors have attended an institution of higher learning.

DAY TRIP V. OVERNIGHTS – EMPLOYMENT TYPE		
EMPLOYMENT	DAY	OVERNIGHT
Full-Time/Self-Employed	58%	59%
Not Employed/Retired	42%	41%

- 59 percent of day and overnight visitors are employed full-time or self-employed.

Situational Analysis

Visitor Profile: Where do they come from and where do they go?



TIME FRAME OF TRAVEL		
	DAY	OVERNIGHT
January–March	14%	14%
April–June	36%	31%
July–September	23%	32%
October–December	27%	22%

- Most day trips occur in the spring, from April to June, while most overnight trips occur in spring and summer, from April to September. The winter months from January to March have the least visitors for both day and overnight trips.

Situational Analysis

Visitor Profile: Where do they come from and where do they go?

TOP 10 DMA OF ORIGIN

DAY TRIP V. OVERNIGHTS – DMA OF ORIGIN			
DMA ORIGIN	DAY	DMA ORIGIN	OVERNIGHT
Washington, D.C. (Hagerstown, MD)	32%	Washington, D.C. (Hagerstown, MD)	17%
Baltimore, MD	29%	Baltimore, MD	15%
Harrisburg-Lancaster-Lebanon-York, PA	11%	New York, NY	9%
Philadelphia, PA	6%	Philadelphia, PA	8%
New York, NY	5%	Pittsburgh, PA	4%
Salisbury, MD	5%	Richmond-Petersburg, VA	4%
Pittsburgh, PA	1%	Wilkes Barre-Scranton, PA	4%
Norfolk-Portsmouth-Newport News, VA	1%	Harrisburg-Lancaster-Lebanon-York, PA	4%
San Francisco-Oakland-San Jose, CA	1%	Salisbury, MD	3%
Johnstown-Altoona, PA	1%	Columbus, OH	2%

A DMA region is a group of counties that form an exclusive geographic area in which the home market television stations hold a dominance of total hours viewed. OTD is interested in visitor's DMA of origin for the purpose of targeting marketing and advertising efforts.

- The majority of day and overnight visitors are coming from the Washington, D.C. (Hagerstown, MD) DMA.
- The New York and Philadelphia DMAs are key feeder markets for overnight trips.

Situational Analysis

Visitor Profile: Where do they come from and where do they go?

WHERE DO OUR VISITORS STAY AND HOW DO THEY GET HERE?

ACCOMMODATIONS & MODE OF TRANSPORTATION (ALL OVERNIGHT TRAVELERS)			
ACCOMMODATIONS		MODE OF TRANSPORTATION	
Standard Hotel (Not Resort)	32%	Personal Auto	76%
Friend or Relative's Dwelling	26%	Air Travel	4%
Home/Apt/Condo (Not Mine)	12%	Rental Car	9%
Suite and Resort Hotel	17%	Taxi or Ride Sharing Service	5%
My Second Home/Apt/Condo (2015+)	5%	Train/Subway	1%
Other Paid Accommodation (B&B, Campsite, Cabin/Lodge, Timeshare, Rented Home, Apartment, Condo)	9%	Other Transportation	3%

- Overnight travelers spend more dollars on paid accommodations; nearly 60 percent of them stay in hotels, motels, resorts.
- The main mode of transportation for 76 percent of overnight visitors is their personal automobile, and 9 percent of visitors use a rental car.

Situational Analysis



What Do Our Visitors Do?

WHAT DO OUR VISITORS DO WHEN THEY COME TO MARYLAND?

DAY TRIP V. OVERNIGHTS – TOP 15 ACTIVITIES OF LEISURE TRAVELERS			
ACTIVITY	DAY	ACTIVITY	OVERNIGHT
Visit Friends/Relatives	24%	Visit Friends/Relatives	28%
Culinary/Dining Experience	22%	Culinary/Dining Experience	24%
Shopping	17%	Beach/Waterfront	19%
Beach/Waterfront	12%	Shopping	17%
Birthday	14%	Birthday	11%
Historic Sites	8%	Nightlife	9%
Touring/Sightseeing	7%	Historic Sites	9%
Nightlife	6%	Touring/Sightseeing	9%
Other Personal Celebrations and Gatherings	6%	Business/Work	7%
Museum, Art Exhibits, etc.	6%	Live Music	6%
Live Music	5%	Parks: National/State, etc.	6%
Business/Work	5%	Other Personal Celebrations and Gatherings	6%
Parks: National/State, etc.	5%	Museum, Art Exhibits, etc.	6%
Amateur Sports	5%	Holiday Celebration	5%
Medical/Health/Doctor Visit	5%	Gambling (slots, cards, horses, etc.)	5%

- The top four activities for day and overnight travelers both are: visiting friends/relatives, culinary/dining experiences, shopping and beach/waterfront.

Source: D.K. Shifflet and Associates, Ltd., with independent analysis by the Maryland Office of Tourism

Departments



ADVERTISING & CONTENT

The goal of the Advertising & Content unit is to raise consumer awareness of and interest in Maryland as a travel destination. OTD uses research to focus the state's marketing efforts on consumers, time periods and markets with the highest propensity of delivering a return on those efforts.

High-quality and informative print and digital publications are designed to maximize the opportunity to inspire consumers to choose Maryland as a travel destination, encourage longer stays and motivate repeat visits. Advertising and Content that support customer experiences, the Big Five and highlight Maryland as a must-see destination.

STRATEGIC PARTNERSHIPS & PUBLIC RELATIONS

The Strategic Partnerships and Public Relations office focuses on working with corporations, organizations, associations and other state agencies to identify and publicize public/private ventures and programs that are mutually beneficial and attract more visitors to partners' destinations or events, and to Maryland in general.

Securing third-party editorial coverage and online conversations about Maryland as a premier travel destination is accomplished by collecting, creating and curating compelling editorial content for communications outlets, and developing social media conversations for journalists and the public.

TOURISM DEVELOPMENT

The Tourism Development Unit (TDU) advances statewide and regional programs that leverage partnerships with public- and private-sector stakeholders to develop assets that maximize opportunities in the domestic and international marketplace. The TDU supports market expansion and increases transactional outcomes through customer interactions at eight Welcome Centers, the Maryland Call Center, fulfillment services and Google optimization.

TRAVEL TRADE SALES

Travel Trade Sales utilizes trade association partnerships, marketplace participation and sales missions to function as a third-party sales facilitator to tour operators, student travel planners, group leaders, meeting and incentive planners. It leverages media buys in new markets with public relations efforts and client meetings. And it fosters a strong Capital Region USA international marketing partnership with Destination DC and Virginia Tourism.

Strategic Objectives

Maximizing Opportunities

- Develop programs and products linking and showcasing Maryland's differentiating visitor experiences and businesses. Programs and products include but are not limited to:

Current Initiatives

- Chesapeake Bay Storytellers 2.0 and Great Chesapeake Bay Loop 2.0
- Maryland: Most Powerful Underground Railroad Storytelling Destination in the World including International Underground Railroad Month
- Maryland Scenic Byways
- Civil War Trails
- Crab & Oyster Trail
- Trail System Second-to-None
- Fish and Hunt

New Initiatives

- Maryland's American Indian/Indigenous Peoples
- Maryland's Civil Rights Network
- Accessible Tourism
- Promote Maryland's Scenic Byways as an ideal way to experience the variety of Maryland's destinations and authentic cultural heritage, as well as prime ways to navigate attractions such as the Harriet Tubman Underground Railroad Visitor Center, Maryland's Crab & Oyster Trail, and the Great Chesapeake Loop.
- Continue to redesign and upgrade our state Welcome Centers as storytelling destinations.
- Work with OTD staff and our content vendor to maintain and improve our VisitMaryland.org website and Industry site.
- Work with publishing partner, Miles, to develop engaging content for *Destination Maryland*, the state's inspirational travel magazine to focus more editorial content on driving tours. Optimize usage of Crowdriff platform to increase amount of user-generated content and imagery within the guide.

Strategic Objectives



Maximizing Opportunities

- Continue to develop new spin-off communication platforms that showcase specific office initiatives and inspire travel.
- Work with research and product development units to determine the best analytical method to gauge consumers' interaction with content, and how they best consume information on Maryland travel products, to guide development of consumer outreach.
- Deploy and cross-purpose our evolving video assets to strategically integrate with ongoing messaging and social media outreach.
- Promote state tourism initiatives through social and third-party editorial placements.
- Promote Maryland travel products through media missions, trade shows, desksides, media FAM tours, educational seminars and consumer promotions.
- Utilize communications networks of affiliated public relations, social media and niche tourism market associations to augment earned and paid media campaigns.
- Participate in trade shows and marketplaces that support sales of Maryland travel products to tour operators and receptive tour operator clients.

Strategic Objectives



Leveraging Partnerships

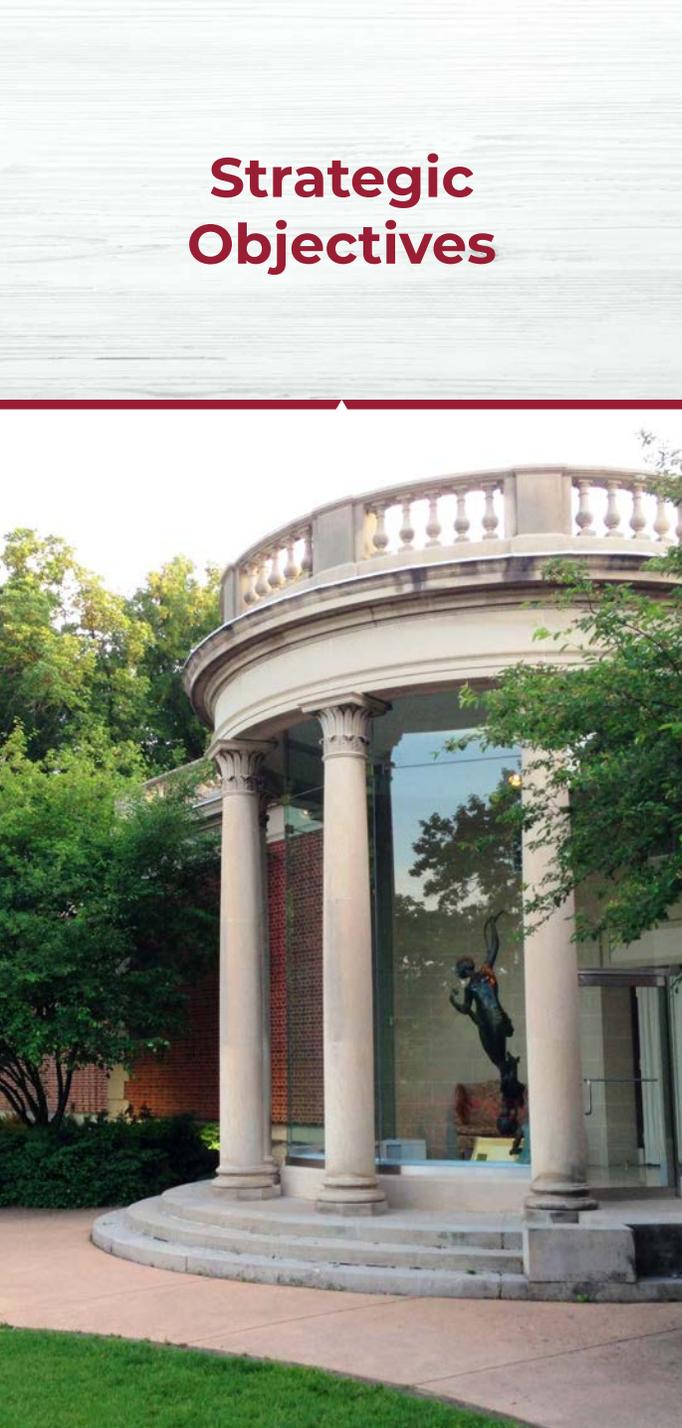
- Implement a stakeholder communication plan to maximize participation in OTD initiatives.
- Seek alternative funding sources through federal programs and national organizations.
- Provide support for interagency tourism-related programs through grant review and technical assistance as needed/requested.
- Provide marketing, event support and media coverage for new partner programming and special anniversary events including International Underground Railroad Month and Maryland Horse Month.
- Provide PR and social media toolkits to partners for use promoting new campaigns.
- Continue to develop the advertising co-op program for Fish & Hunt Maryland to allow increased participation with DMOs, partners and stakeholders.
- Work with OTD Research office and DMO partners to deploy and maximize partner information and statistics through shared use of new Symphony Dashboards.
- Continue to develop relationships with our Flyfishing partners, the Office of Outdoor Recreation, and Department of Natural Resources to develop, introduce and promote our new Maryland Flyfishing Trail, the first such statewide trail in the nation.
- Continue to build engaging content to support new tourism areas for growth, such as Chesapeake Bay Storytellers, Watermen's Heritage and the C&O Canal Experience.
- Partner with Maryland Fish & Hunt to promote Maryland and partner destinations at the Great American Sport & Outdoor Show to reach individuals in targeted geographic markets.

Strategic Objectives

Leveraging Partnerships

- Continue to capture and catalog new visual assets, images/videos and supplement the accompanying credit, rights, usage and expiration data in the Digital Asset Management system (WebDAM) and make visual assets available to tourism partners and media.

PUBLICATION	AUDIENCE	DISTRIBUTED	QUANTITY
<i>Visit Maryland Now!</i> e-newsletter	Consumer	Monthly	140,000+
<i>Insights</i> e-newsletter	Industry/Government	Bi-weekly	9,500
Product Development collateral	Consumer	As needed	As needed
Profile Sheets	Trade and Media	As needed	As needed
<i>Destination Maryland</i>	Consumer	January 2023	250,000



Strategic Objectives



Market Expansion

- Administer OTD grant programs to drive domestic and international demand for Maryland travel businesses, products and services.
- Increase customer interactions through participation in Trade and Consumer shows.
- Maintain a communications platform that can be leveraged and enhanced by DMOs and the private sector to increase awareness of Maryland as a compelling, must-see destination offering lots to do.
- Continue efforts to appeal to and address an expanded range of diverse audiences with custom messaging, imagery and media buys, including further development of Visit Maryland messaging, 'Open Roads' creative, and the 'Storytellers' radio series.
- Continue to invest in specific campaigns that inspire overnight travel in Maryland, such as 'Home for the Holidays,' 'Open for Overnights' and 'Deals & Discounts' to encourage overnight travel.
- Continue to invest in outer drive markets to encourage overnight visitation from Ohio and Pennsylvania.
- Continue to develop and expand cooperative advertising programs on multiple platforms that can be purchased by Maryland's tourism industry.
- Continue to produce and launch new Byways videos and short "sizzle reels" to grow our collection of assets that showcase the routes as a viable way to explore Maryland.
- Work with the Destination International Global Marketing Committee to showcase Maryland as a desirable U.S. destination.
- Target Maryland's core feeder markets of Washington, D.C., Philadelphia, Pittsburgh, and New York City through social media engagement, FAM tours, and press outreach and missions.

Strategic Objectives



Market Expansion

- Develop and manage a comprehensive media relations program that generates print, broadcast and electronic coverage with a target earned media value of at least \$1 million annually.
-
- Continue to work with Capital Region USA to focus on promoting Maryland's Scenic Byways, culinary, history and outdoor recreation offerings to international markets.
- Target national media to increase coverage by lifestyle outlets and other third-party endorsers such as *Food Network*, *Southern Living*, *Garden & Gun* and Travel Channel.
- Coordinate the development of regional tour products and participate in promotional opportunities, which will result in Maryland being highlighted as a preferred tour destination.
- Support Canada-centric PR and Sales opportunities with our Canadian PR partner, REACH Global.

Strategic Objectives



Transactional Outcomes

- Operate eight Maryland Welcome Centers, the Maryland Call Center and fulfillment services to increase the number of visitors, their length of stay and their spending.
- Administer database programming in support of OTD marketing and development activities, businesses, events and deals.
- Integrate Google marketing into OTD initiatives and programs such as Welcome Centers, Scenic Byways, Civil War Trails, Network to Freedom members, etc.
- Work with tourism industry partners to create social media campaigns that link directly to their ticketing and/or product pages, including “Trails Tuesdays.”
- Produce a digital catalog, “Give the Gift of Maryland” for the holiday season that showcases companies with diverse owners including Black, women and LGBTQ+.
- Coordinate industry promotional deals to help drive traffic. This also includes itineraries and tour packages, which support sales to the packaged travel industry.

Events Calendar



AUGUST 2022

Educational Seminars for Tourism Officers (ESTO) Conference	6-9 <i>Grand Rapids, MI</i>
Maryland Tourism Coalition-Summer Soiree	17 <i>Ocean City, MD</i>
Maryland Association of Counties Summer Conference	17-20 <i>Ocean City, MD</i>
Student Youth Travel Association Marketplace	26-29 <i>Washington, D.C.</i>

SEPTEMBER 2022

SEE Conference - Crowdriff	25-27 <i>Toronto, ONT</i>
Maryland Motorcoach Association Group Leader Marketplace	26-27 <i>Salisbury, MD</i>
Greater New Jersey Motorcoach Association Marketplace	28-29 <i>Atlantic City, NJ</i>

OCTOBER 2022

Capital Region USA Global Travel Exchange	10-12 <i>Washington, D.C.</i>
Maryland 5 Star Event	14-16 <i>Fair Hill, MD</i>
Mid-Atlantic Tourism Public Relations Alliance Media Marketplace	18-20 <i>Altoona & Happy Valley, PA</i>

NOVEMBER 2022

National Tour Association Travel Exchange	13-16 <i>Reno, NV</i>
Ontario Motor Coach Association Marketplace	13-16 <i>Niagara Falls, ONT</i>
Maryland Tourism Coalition Tourism & Travel Summit	14-16 <i>Ocean City, MD</i>

FEBRUARY 2023

American Bus Association Marketplace	4-7 <i>Detroit, MI</i>
Great American Outdoor Show	4-12 <i>Harrisburg, PA</i>

MARCH 2023

Pennsylvania Bus Association Marketplace	27-28 <i>PA's Americana Region/ Morgantown, PA</i>
--	---

APRIL 2023

Destination Capitol Hill	19-20 <i>Washington, D.C.</i>
--------------------------	----------------------------------

MAY 2023

National Travel & Tourism Week	7-13 <i>Nationwide</i>
U.S. Travel Association IPW Marketplace	20-24 <i>San Antonio, TX</i>

JUNE 2023

Pennsylvania Bus Association Annual Meeting/Sales Retreat	18-21 <i>Chautauqua County/ Jamestown, NY</i>
---	--

OTD Checklist

LET'S BE OPEN FOR MORE CUSTOMERS BY WORKING TOGETHER.

There are many ways to partner with the Maryland Office of Tourism in order to market your destination/attraction and to get the word out about your events and initiatives. Here are a few suggestions and contact information for our staff members who can help you.

- Meet with a Travel Counselor at any of the eight Maryland Welcome Centers and your local Visitor Center. info@visitmaryland.org
- Distribute your brochures and display marketing materials at Maryland Welcome Centers. Marti Banks, 301-490-2444, marti.banks@maryland.gov
- Send your press releases to us and participate in travel media familiarization tours (FAM tours). Leslie Troy, 410-767-6298, ltroy@visitmaryland.org
- Review visitmaryland.org to make sure your business listing is up to date. info@visitmaryland.org
- Get help with writing your business listing content. Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov
- Add your business listing, events, package deals and discounts to the VisitMaryland.org website. Brandon Chan, 301-447-3719, brandon.chan@maryland.gov or Flo Brant, 301-293-4172, flo.brant@maryland.gov
- Follow @TravelMD (Facebook/Twitter) and @visitmaryland (Instagram) and use our hashtag #MDinFocus on social media
- Provide tickets/prizes for Maryland Mondays giveaways. Leslie Troy, 410-767-6298, ltroy@visitmaryland.org
- Utilize the resources and information on the Maryland Office of Tourism industry website, industry.visitmaryland.org
- Submit photos to our WebDAM (Web Digital Asset Management) for Maryland Office of Tourism use. Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov
- Create group tour opportunities and let us know about them. Rich Gilbert, 410-767-6288, rgilbert@visitmaryland.org
- Get help reaching the travel trade market—group tours, student groups, reunions and receptive travel buyers. Participate in sales missions and trade show outreach, and receive tour leads. Rich Gilbert, 410-767-6288, rgilbert@visitmaryland.org
- Use “Maryland OPEN” branding and creative assets in your advertising. Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov
- Market your story through the National UGRR Network to Freedom, National Civil Rights Network, Chesapeake Bay Storytellers, and Civil War Trails programs. Anne Kyle, 410-767-0696, anne.kyle@maryland.gov and Marci Ross, marci.ross@maryland.gov
- The Maryland Office of Tourism promotes worldwide through our partners at Capital Region USA (CRUSA) and Brand USA. Scott Balyo, 540-450-7593, sbalyo@capitalregionusa.org
- Expand your markets through OTD’s initiative-based Google Business Profile program. Trevor Leach, trevor.leach@maryland.gov

