



Fiscal Year 2024 Tourism Marketing and Development Plan

MARYLAND TOURISM DEVELOPMENT BOARD AND THE OFFICE OF TOURISM DEVELOPMENT



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Preface Statements

Maryland Office of Tourism

WHAT IS TOURISM?

Tourism is an economic ecosystem that delivers opportunity and quality of life for Marylanders, which is derived from visitor spending.

WHAT IS THE VISION?

Maryland leads the way as one of America's most exciting, diverse and welcoming destinations—creating memories and experiences for visitors worldwide to enjoy.

WHAT IS THE MISSION?

The Maryland Office of Tourism stimulates and drives Maryland's thriving tourism economy, with a primary goal of creating a great place for all Marylanders to live, work and play.



Director's Letter



It's time again to set our strategy for promoting tourism and travel in Maryland. As Managing Director of the Maryland Office of Tourism, I want to thank the Maryland Tourism Development Board for all they do in continuing to help provide guidance in our providing a positive Maryland tourism experience for our customers.

As we enter a new fiscal year, we continue to see our visitor and spending numbers follow an upward path. The Tourism industry in Maryland provides some 113,000 jobs around the state, making Tourism the 11th largest private sector employer in the state. Tourism in Maryland creates \$16.4 billion in spending, providing \$2.1 billion in tax revenues.

And on behalf of the Maryland Tourism Development Board, I would like to thank Governor Moore for his support of the tourism industry in Maryland. We appreciate his strong support and thank him for record funding for the Maryland Tourism Development Board of \$12.6 million for FY 2024. 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. It also, introduces some of the important new partnership initiatives that will drive our endeavors in the coming year, including helping to support our Tourism-related businesses and partners. Some of those initiatives such as continuing to promote Maryland as the Most Powerful Underground Railroad Storytelling Destination in the World, touting our Trail System Second-to-None.

I am proud of the Board's continuing work with the Office of Tourism, and am pleased to present the Fiscal Year 2024 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.

Executive Director, Maryland Office of Tourism & Film



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

Fiscal Year 2024 Marketing Plan

Our marketing plans have always been organic documents, providing us 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 continued return to normalcy on the travel landscape, and improvement over the previous several years.

The Maryland Office of Tourism has adopted a fresh tagline to market travel to the state with our new “Maryland: You’re Welcome” positioning statement, and continued to see real success in advertising response, web site visits, social media engagement, public relations outreach, and working with the industry to continue to develop stakeholder engagement through the Welcome Centers and call center program, and training for the industry to serve the traveling public.

This marketing plan has been built with an eye toward the future built upon knowledge gleaned over the last year. We never stopped building upon our differentiators: 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; our 18 Open Roads Scenic Byways, and our Fish & Hunt Maryland program.

It turns out that these differentiators and our “You’re Welcome” 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 classic road trip continues to drive visitation.

Maryland exists in a very competitive space when it comes to advertising expenditures. States such as Virginia and New York continue to spend at an enormous rate to drive visitation. The reality is that in our footprint, we are seeing the results of our advertising, and that consumers are ready to travel. With more flexible work schedule options, and a pent-up demand for travel, our customers find Maryland a desirable destination.

Throughout this marketing plan, you will learn how the team plans on continuing to build upon success, remain alert to sustainable trends, build product offerings that differentiate Maryland, and market effectively and efficiently. We will continue to build upon our “You’re Welcome” campaign because we believe that Maryland has something to offer for everyone.



Situational Analysis

Outdoor Participation Continues to Increase in 2023

In 2022, 82 percent of Americans indicated that they participated in outdoor activities such as camping and hiking at a location away from their home, boating, or visiting a state or national park. This is an increase from 60 percent in 2020 and 79 percent in 2021.

This trend will continue into 2023 and beyond, as 97 percent of Americans said they plan to enjoy outdoor activities this upcoming year, an increase from 95 percent last year. According to the survey, younger Americans are leading this growth as Gen Z were more likely to increase their activity in 2023 compared to Gen X and Baby Boomers.

American Express Travel's 2023 Global Travel Trends Report noted 89 percent of survey respondents agreed that they were keen to travel to entirely new destinations. Additionally, 85 percent of respondents highlighted a desire to immerse themselves in the local culture, and 88 percent wanted to purchase from local small businesses.

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.

One of the drivers of that increase is that within 200 miles of Maryland are six of the most affluent counties in the country — all within an easy drive of the state's destinations. Early indicators demonstrate that it is anticipated that this trend will continue — a warning indicator is that the increased interest in our consumers is that they are being highly targeted by marketers both in the travel industry and general high-end consumer products.

Many jurisdictional authorities realized that the pandemic's devastating effect on the tourism industry dramatically decreased sales tax revenue. Some states reacted with slashing tourism budgets and others, such as Maryland, continued 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.



Situational Analysis

Richest Counties in the U.S.



COUNTIES IN THE U.S. WITH MEDIAN HOUSEHOLD INCOMES OF \$100,00 OR MORE			
COUNTY	MEDIAN HOUSEHOLD INCOME	POPULATION	METRO AREA
Loudoun County, VA	\$147,111	427,592	WASHINGTON, DC
Santa Clara County, CA	\$130,890	1,885,508	SAN FRANCISCO BAY
San Mateo County, CA	\$128,091	737,888	SAN FRANCISCO BAY
Fairfax County, VA	\$127,866	1,139,720	WASHINGTON, DC
Howard County, MD	\$124,042	334,529	WASHINGTON/BALTIMORE
Arlington County, VA	\$122,604	232,965	WASHINGTON, DC
Marin County, CA	\$121,671	260,206	SAN FRANCISCO BAY
Douglas County, CO	\$121,393	368,990	DENVER
Nassau County, NY	\$120,036	1,390,907	NEW YORK CITY
Los Alamos County, NM	\$119,266	19,330	SANTA FE

Source: Investinations



Situational Analysis

Competitive State Tourism Marketing Budgets

Competition for consumers’ discretionary dollars has always been competitive. After COVID-19 shut down many businesses, many industries are facing decreased revenue as consumers adapt to the new ways of purchasing or have held off on purchases due to an uncertain future.

STATE	MARKETING BUDGET 2023
Florida	\$54,456,106
West Virginia	\$23,467,111
Puerto Rico	\$17,600,000
South Carolina	\$14,052,826
Maryland	\$10,058,800
Virginia	\$8,487,000
Massachusetts	\$5,031,600
Delaware	\$1,000,000

Research from the Interactive Advertising Bureau said that advertisers across all platforms invested \$279 billion in 2021 to sway consumers to purchase their products. Against that backdrop of automobile manufacturers, fast food and chain restaurants, grocery and retail stores, and the beverage industry plus many others, state tourism offices collectively spend nearly \$1 billion in wooing the consumer’s discretionary dollar.

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. The remainder — representing the state’s purchasing power — is \$10.1 million.

Within this competitive marketplace, many other destinations are vying for those affluent customers for the same reasons. Many tourism entities are doubling down on advertising to encourage visitors to select their destination. Many of these destinations are in our media market.



Situational Analysis

Annual OTD Marketing Plan Visitor Profile

Maryland welcomed nearly 43 million domestic travelers (based on person-trips measurement) with total direct spending of \$14.3 billion according to a national survey of U.S. travelers conducted by D.K. Shifflet & Association, a leading tourism industry research firm of MMGY Global Company. The direct spending increased 5 percent compared to 2021.

Seventy-eight percent — or \$11.2 billion — was generated from leisure travel and the remaining \$3.1 billion were from business travel. For the visitation volume, 82 percent, or 35.2 million, were leisure travelers and the remaining 18 percent, or 7.7 million were business travelers.

VISITOR VOLUME ESTIMATES IN CALENDAR YEAR 2022 (PERSON-TRIPS IN MILLIONS)								
	MARYLAND			% CHANGE	U.S.			% CHANGE
	2020	2021	2022	2022 VS 2021	2020	2021	2022	2022 VS 2021
TOTAL	8,236	13,641	14,272	4.6%	2,125	1,299,118	1,621,086	24.8%
BUSINESS	1,818	2,911	3,091	6.2%	343	258,561	328,198	26.9%
LEISURE	6,418	10,730	11,181	4.2%	1,782	1,040,557	1,292,889	24.2%
DAY	1,767	3,669	3,723	1.5%	1,245	252,430	322,147	27.6%
OVERNIGHT	6,469	9,972	10,549	5.8%	880	1,046,688	1,298,939	24.1%

VISITOR VOLUME ESTIMATES - % OF TRAVELERS (SHARE)						
	MARYLAND			U.S.		
	2020	2021	2022	2020	2021	2022
TOTAL						
BUSINESS	13.8%	14.0%	17.9%	16.1%	19.1%	21.9%
LEISURE	86.2%	86.0%	82.1%	83.9%	80.9%	78.1%
DAY	53.7%	56.7%	60.4%	58.6%	57.6%	58.5%
OVERNIGHT	46.2%	43.3%	39.6%	41.4%	42.4%	41.5%

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



Situational Analysis

Annual OTD Marketing Plan Visitor Profile

Overnight travel represents 40 percent of the state's total visitation, or 17 million. In 2022, visitation (43 million) exceeded the total of 2019's volume (35 million), leisure travel increased 17.2 percent and business travel increased 57.2 percent. The day travel segments increased 12 percent and the overnight travel segments increased 31 percent. Maryland's visitor volume increased 22.8 percent in total.

At the national level, there was a 11.2 percent increase in visitor volume. In 2022, national travel volume increased 11.2 percent compared to 2021, the total domestic U.S. visitor volume, as measured in person-trips level, reached 3.16 billion, 318.7 million more visitors nationwide than in 2021. Leisure travel represented 78 percent of all person-trips, with day trips representing 58.5 percent and overnight 41.5 percent of visitor volume.

The breakdown of visitors to Maryland by day trip and overnight travel segments (based on person-trips) in 2022 is similar to that of the national level (about 60 percent day and 40 percent overnight); nevertheless, the share of the state's leisure travel segment was slightly larger than the national (82 percent Vs. 78 percent), a share that's fairly consistent over the past years. In terms of their spending, leisure travelers contribute 82 percent to Maryland's total spending (\$14 billion) — \$11.2 billion, up about 4.6 percent compared to 2021. Business travelers spent \$3.1 billion (15.2 percent), which is up 6.2 percent compared to 2021.



Situational Analysis

Trends and Comparisons

MARYLAND OUTPACED ITS COMPETITOR'S REGIONAL VISITOR VOLUME 2022

On the person-stays level, we saw a total 11.4 percent increase in the state compared to 2021. Business travel had a 40 percent increase, the highest growth among the competitor states, DC, DE, PA, VA, and WV in the business category in 2022.

TYPE OF TRAVEL - PERCENTAGE CHANGE							
	MD	U.S.	D.C.	DE	PA	VA	WV
TOTAL	11.4%	9.7%	10.0%	6.3%	3.9%	7.6%	4.9%
BUSINESS	40.4%	23.6%	3.2%	15.7%	13.2%	8.0%	9.0%
LEISURE	6.7%	7.1%	13.1%	4.7%	2.5%	7.6%	4.4%
DAY	16.3%	12.7%	6.7%*	11.4%	3.1%	10.5%	9.0%
OVERNIGHT	4.3%	6.4%	11.9%	0.8%	4.9%	5.1%	-1.2%

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



Situational Analysis

Trends and Comparisons

MARYLAND OUTPACED ITS COMPETITOR'S REGIONAL VISITOR VOLUME 2022

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

VISITOR VOLUME (IN MILLIONS) - 2022							
	U.S.	MD	D.C.	DE	PA	VA	WV
PERSON-STAYS	YE 2022	YE 2022	YE 2022	YE 2022	YE 2022	YE 2022	YE 2022
TOTAL	3,909.90	54.96	20.73	14.04	141.38	86.59	23.39
BUSINESS	678.71	9.63	6.10	2.20	19.44	16.22	2.83
LEISURE	3,231.19	45.32	14.63	11.84	121.93	70.37	20.56
DAY	2,095.60	33.93	7.21	7.62	78.77	41.91	14.60
OVERNIGHT	1,814.30	21.03	13.52	6.42	62.60	44.68	8.78

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



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.



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, and to each region’s share of visitation.

SHARE OF MARYLAND VISITATION				
MARYLAND DESTINATION REGIONS		2022	2021	2020
CENTRAL REGION	Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, and Howard counties	59.1%	59.1%	30.3%
EASTERN SHORE	Caroline, Cecil, Dorchester, Kent, Queen Anne’s, Somerset, Talbot, Wicomico, and Worcester counties	12.5%	18.5%	37.9%
CAPITAL REGION	Frederick, Montgomery, and Prince George’s counties	18.0%	16.0%	20.9%
WESTERN MARYLAND	Allegany, Garrett, and Washington counties	7.2%	3.3%	8.2%
SOUTHERN REGION	Calvert, Charles, and St. Mary’s counties	3.3%	3.1%	2.7%

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?



TOP 5 DMA* VISIT VOLUME

DMA* VISITOR VOLUME					
	2022			2021	
	% OF VISITORS TO MD	TOTAL VISITOR NUMBER (IN MILLIONS)		% OF VISITORS TO MD	TOTAL VISITOR NUMBER (IN MILLIONS)
Washington D.C. (Hagerstown, MD)	44.9%	24.70	Washington D.C. (Hagerstown, MD)	26.2%	12.95
Baltimore, MD	27.9%	15.32	Baltimore, MD	23.9%	11.78
Philadelphia, PA	7.6%	4.17	Harrisburg-Lancaster-Lebanon-York, PA	8.2%	4.05
Harrisburg-Lancaster-Lebanon-York, PA	6.6%	3.65	Philadelphia, PA	6.4%	3.17
New York, NY	2.6%	1.43	New York, NY	6.3%	3.09

** A DMA® region is a group of U.S. counties that form an exclusive geographic area based on the television-viewing habits of the people residing in the county.*



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.

MARYLAND/OCEAN CITY/BALTIMORE SHARE OF VISITS			
2022	MARYLAND	BALTIMORE	OCEAN CITY
Estimated Share of Visits	100%	29.9%	12.9%
Estimated Person-Stays (in Millions)	54.96	16.44	7.11
Average Person Stays	1.7	1.7	2.4
Average Length of Stay	1.3	1.1	2.5
Average Pending per Person per Day	\$118.82	\$142.57	\$116.93
Spending in MD per Travel Party	\$265.68	\$267.35	\$684.30

TOP 3 DMAS OF ORIGIN					
MARYLAND		BALTIMORE		OCEAN CITY	
Washington, D.C.	45%	Washington, D.C. (Hagerstown, MD)	34%	Harrisburg-Lancaster-Lebanon-York, PA	30%
Baltimore, MD	28%	Baltimore, MD	19%	Baltimore, MD	25%
Harrisburg-Lancaster-Lebanon-York, PA	8%	Harrisburg-Lancaster-Lebanon-York, PA	9%	Philadelphia, PA	20%

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?

- The majority of the day and overnight visitors are coming from the Washington, DC (Hagerstown, MD), and Baltimore DMAs.
- The key markets that visitors come from are: Philadelphia, Pittsburgh, and Harrisburg-Lancaster-Lebanon-York, PA; Richmond-Petersburg, VA and New York City, NY.

DAY TRIP V. OVERNIGHTS - TOP STATES OF ORIGIN			
ORIGIN DMA	DAY TRIP	ORIGIN DMA	OVERNIGHT
Washington, DC (Hagerstown, MD)	45%	Washington, DC (Hagerstown, MD)	16%
Baltimore, MD	28%	Baltimore, MD	15%
Philadelphia, PA	8%	Philadelphia, PA	10%
Harrisburg-Lancaster-Lebanon-York, PA	7%	New York, NY	7%
New York, NY	3%	Pittsburgh, PA	4%
Richmond-Petersburg, VA	2%	Norfolk-Portsmouth-Newport News, VA	3%
Salisbury, MD	1%	Harrisburg-Lancaster-Lebanon-York, PA	3%
Norfolk-Portsmouth-Newport News, VA	1%	Raleigh-Durham (Fayetteville), NC	2%
Boston, MA (Manchester, NH)	1%	Dallas-Fort Worth, TX	2%
Pittsburgh, PA	1%	Los Angeles, CA	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 the visitor's DMA of origin for the purpose of targeting marketing and advertising efforts.



Situational Analysis

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



INTRO

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.

ADVERTISING IS COMPETITION FOR CONSUMERS' HEARTS & WALLETS

Maryland's prime location on the mid-Atlantic corridor puts our destination within reach of a desirable target demographic. Five of the richest counties are within a less than one hour drive of Maryland's borders and one is a quick drive down I-95 from Long Island, NY.



Situational Analysis

Visitor Profile: Who are they and What do they enjoy?

MARYLAND VISITOR: WHO ARE OUR VISITORS, WHAT ARE THEY LIKE & WHAT DO THEY WANT TO DO?

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 of about one day’s duration within the United States in the past 12 months, which includes business, vacation, weekend travel and getaways.

The following tables compare the demographics and trip profiles for Maryland day-trippers and overnight travelers.

- **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.

DAY TRIP V. OVERNIGHTS - INDIVIDUAL		
	DAY	OVERNIGHT
GENDER		
MALE	53%	51%
FEMALE	47%	49%
AGE		
18 - 34	25%	21%
35 - 49	25%	24%
50 - 64	25%	32%
65+	25%	23%

- Stats shows males took the larger share of the day trip (53 percent) slightly; males and females have about the equal percentage of the overnight trips in 2022.
- Each age group of visitors takes one fourth of the shares of day trips.
- Visitors ages 50–64 represent the large share of overnight trips (32 percent).
- More than half of the overnight trip visitors (55 percent) are ages 50 or older



Situational Analysis

Visitor Profile: Who are they and What do they enjoy?

DAY TRIP VS. OVERNIGHTS - INCOME		
INCOME	DAY TRIP	OVERNIGHT
Under \$50K	25%	24%
\$50K-\$74.9K	16%	16%
\$75K-\$99.9K	14%	15%
\$100K-\$149.9K	20%	22%
\$150K+	25%	23%

- Visitors to Maryland are affluent with nearly half of the visitors having a household income of \$100,000 or more, with 25 percent earning more than \$150,000.

DAY TRIP VS. OVERNIGHTS - MARITAL STATUS		
MARITAL STATUS	DAY TRIP	OVERNIGHT
Married/Partnered	69%	72%
Never Married	19%	17%
Divorced/Widowed	12%	11%

- Most day and overnight visitors to Maryland travel with a partner.

DAY TRIP VS. OVERNIGHTS - EDUCATION		
EDUCATIONAL ATTAINMENT	DAY TRIP	OVERNIGHT
High School Graduate	25%	25%
Some College	26%	26%
College Graduate	25%	24%
Post-Graduate	21%	22%

- Visitors to Maryland are well educated, 46 percent of day trip and overnight visitors have at least a college degree. Seventy-two percent of visitors have attended an institution of higher learning.

DAY TRIP VS. OVERNIGHTS - EMPLOYMENT TYPE		
EMPLOYMENT	DAY TRIP	OVERNIGHT
Full-Time/Self-Employed	73%	66%
Not Employed/Retired	26%	34%

- About 70 percent of day trip and overnight visitors are employed full time or self-employed.



Situational Analysis

Visitor Profile: Who are they and What do they enjoy?



DAY TRIP V. OVERNIGHTS - FAMILIES		
HOUSEHOLD SIZE	DAY	OVERNIGHT
1 Member	12%	11%
2 Members	39%	39%
3 Members	20%	19%
4 Members	17%	19%
5+ Members	12%	12%
Children Present in Travel Party	9%	13%

- Couples or parties of 2 members take the large shares of both day trips and overnight trips (39 percent).
- Nearly 50 percent of day and overnight trips are taken by households with 3 or more members.
- Approximately 11 percent of households traveling to Maryland have children present.

TIME FRAME OF TRAVEL		
	DAY	OVERNIGHT
January–March	18%	23%
April–June	33%	28%
July–September	22%	27%
October–December	28%	21%

- 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 Jan to March have the least day trip visitors.



Situational Analysis

2022 Top 5 States of Origin



DAY TRIP V. OVERNIGHTS - STATE OF ORIGIN						
DMA ORIGIN		DAY TRIP		DMA ORIGIN		OVERNIGHT
Maryland		57%		Maryland		24%
Virginia		14%		Pennsylvania		15%
Pennsylvania		13%		Virginia		13%
District of Columbia		4%		New York		6%
West Virginia		3%		Florida		5%
Delaware		2%		New Jersey		5%
New York		2%		California		3%
New Jersey		1%		West Virginia		3%
Massachusetts		1%		North Carolina		3%
California		0.7%		Ohio		3%

- About 93 percent of day travelers come from Maryland and bordering states while 55 percent of overnight travelers come from these same states.
- Overnight travelers are a little more diversified with 18 percent coming from longer-haul states such as Florida, California and North Carolina, Ohio and New York.

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.



Situational Analysis

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)	40%	Personal Vehicle	66%
Friend or Relative's Dwelling	25%	Rental Vehicle	8%
Suite & Resort Hotel	12%	Taxi or Ride-Sharing Service	7%
Home/Apt/Condo (Not Visitors)	11%	Company/Work Vehicle	4%
Visitor's Second Home/Apt/Condo (2015+)	4%	Airplane	4%
Other Paid Accommodation (B&B, Campsite, Cabin/Lodge, Timeshare, Rented Home, Apartment, Condo)	7%	Other Transportation	11%

Accommodations & Mode of Transportation for All MD Overnight Travelers

- Overnight travelers spend more dollars on paid accommodations, more than 70 percent of them stay in hotels, motels, resorts and other paid accommodations.
- The main mode of transportation for 63 percent of overnight visitors is their personal automobile, 12 percent travel by air and 9 percent of the visitors use rental cars.



Situational Analysis

What do Our Visitors Do?

Top 15 Activities of Leisure Travelers

- The top four activities for both day trip and overnight travelers are visiting friends and relatives, business/work, beach/waterfront, birthday celebrations or shopping.
- Other activities, such as culinary/dining experiences, anniversary celebrations, tours/sightseeings, outdoor activities, nightlife, shows, amateur & professional sports, live music and holiday celebrations are among the top 15 activities.

TOP 15 ACTIVITIES FOR LEISURE TRAVELERS			
ACTIVITY	DAY	ACTIVITY	OVERNIGHT
Business/Work	17.1%	Visit Friends/Relatives (General Visit)	14.1%
Visit Friends/Relatives (General Visit)	8.4%	Beach/Waterfront	12.0%
Birthday Celebration	8.3%	Business/Work	8.8%
Shopping	7.0%	Birthday Celebration	7.5%
Beach/Waterfront	5.7%	Nightlife (Bar, Nightclub, etc.)	4.1%
Culinary - Special Dining Experience	4.4%	Anniversary Celebration	3.8%
Anniversary Celebration	4.1%	Holiday Celebration (Thanksgiving, 4th of July, etc.)	3.6%
Medical/Health/Doctor Visit	3.7%	Funeral/Memorial	2.5%
Bicycling	3.4%	Amateur Sports (Attend/Participate)	2.5%
Amateur Sports (Attend/Participate)	3.1%	Touring/Sightseeing	2.3%
Culinary - Typical Restaurant Dining	2.9%	Theater/Dance Performance	2.2%
Professional Sports Event	2.0%	Live Music (Festivals, Concerts, Clubs, etc.)	2.2%
Shows (Antique, Art, Auto, Boat, Home, etc)	2.0%	Boating/Sailing	1.9%
Zoo/Aquarium	1.8%	Medical/Health/Doctor Visit	1.9%
Holiday Celebration (Thanksgiving, 4th of July, etc.)	1.6%	Wedding	1.7%

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 content 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 unit 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

Market Expansion

- Maintain a communications platform that can be leveraged and enhanced by the DMOs and the private sector to increase awareness of Maryland as a compelling, must-see destination offering lots to do.
- Continue to work with advertising/marketing agency to expand our newest signature advertising campaign, “Maryland— You’re Welcome” to be carried across multiple platforms.
- Continue efforts to appeal to and address an expanded range of diverse audiences with custom messaging, imagery and media buys, including further development of ‘Maryland—You’re Welcome’ messaging, ‘Open Roads Byways’ creative, and the ‘Storytellers’ radio series.
- Continue to invest in specific campaigns that inspire overnight travel in Maryland, such as ‘Home for the Holidays,’ ‘Welcome for Overnights’ and ‘Deals & Discounts.’
- Continue to invest in outer drive markets to encourage overnight visitation from Ohio and Pennsylvania to promote driving trips.
- Continue to work with Capital Region USA on international marketing efforts in its trade markets of the U.K., France and Germany, and with BrandUSA on international marketing efforts such as Canada.
- Continue to develop and expand cooperative advertising programs on multiple platforms that can be purchased by Maryland’s tourism industry that encompasses destinations, accommodations, tour services and attractions.
- Initiate and test geographic- and interest-driven travel itineraries, based on research findings.
- 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.
- Administer OTD grant programs to drive domestic and international demand for Maryland travel businesses, products and services.



Strategic Objectives

Market Expansion

- Increase customer interactions through participation in Trade and Consumer shows.
- Target audiences beyond 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.
- Develop and manage a comprehensive media relations program that generates print, broadcast, and electronic coverage with a target earned media value of at least \$5 million annually.
- Target national media to increase coverage by lifestyle outlets and other third-party endorsers such as Food Network, Southern Living, Garden & Gun, Travel Channel, Travel + Leisure, National Geographic, Conde Nast Traveler.
- Contract for literature distribution in Canada storefront welcome center and for CAA mailings; including Maryland representation in selected travel shows in Montreal & Ottawa.
- Continue to work with Capital Region USA to focus on promoting Maryland's Scenic Byways, culinary, history and outdoor recreation offerings to international markets.
- Increase awareness of Maryland as a destination of choice for the international travel trade through participation in targeted U.S. based international travel marketplaces, FAM tours and other promotional activities. Maintain partnership with the Capital Region USA and hosting the Global Travel Exchange.



Strategic Objectives

Maximizing Opportunities

- 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, Trail System Second-to-None, and the Great Chesapeake Loop.
- Continue to maintain and upgrade our state Welcome Centers as story-telling destinations.
- Work with OTD Interactive team and our content vendor to maintain and improve our VisitMaryland.org web site 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.
- Continue to develop new spin-off publications that showcase specific office initiatives and inspire travel.
- Work with research and product development units to determine best analytical method to gauge consumer's interaction with content and how they best consume information on Maryland travel products to guide development of consumer publications and outreach.
- Ensure that all curated content for the office's customer outreach is amplified through social media platforms.
- Promote state tourism initiatives (i.e., Underground Railroad storytelling initiatives, C&O Canal Experience, Maryland's Trail System Second-to-None, Great Chesapeake Bay Loop, Scenic Byways, etc.) through social and third-party editorial placements.



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

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

New Initiatives

- Maryland's American Indian/Indigenous Peoples
- Maryland's Civil Rights Network
- Accessible Maryland
- 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.
- Create and promote compelling and trending social media content; share user-generated content; prioritize video content (reels).
- Organize participation in trade shows and marketplaces that support the selling of Maryland travel products to tour operators and receptive tour operator clients.
- Promote Maryland travel products through sales missions, FAM tours, educational seminars and promotions.



Strategic Objectives

Leveraging Partnerships

- Continue to develop and expand 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 Symphony Dashboard data.
- Continue to develop relationships with our Flyfishing partners, the Office of Outdoor Recreation, and Department of Natural Resources 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, the C&O Canal Experience, and making use of newer funds for development and promotion of local alcohol manufacturing, including expanding deployment of initiative-specific co-op marketing opportunities.
- 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.
- Expand the stakeholder communication plan to maximize participation in OTD initiatives, programs and projects.
- Seek alternative funding sources through federal programs and national organizations.
- Provide support for inter-agency 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 National Travel and Tourism Week, the 5th Annual International Underground Railroad Month, Maryland Horse Month, Chesapeake Bay Storytellers, and Fish & Hunt Maryland.



Strategic Objectives

Leveraging Partnerships

- Provide PR and Social Media Toolkits for new campaigns for partners to use throughout the year.
- Amplify partner messaging on new products, events and anniversaries (i.e. Great Wolf Lodge, Maryland Italian Festival, Hagerstown Municipal Stadium opening, etc.)
- Coordinate industry promotions with developing itineraries and tour packages, which support sales to the packaged travel industry.
- Support and participate in promotional opportunities and sponsorships, which will result in Maryland being highlighted as a preferred tour destination.
- Arrange for Maryland marketing partners to have direct contact with clients through sales promotions and sales calls.
- Coordinate cooperative advertising opportunities which will support sales to the packaged travel industry.
- Partner with the Maryland tourism industry members to promote Maryland and partner destinations at the Great American Sport & Outdoor Show to reach individuals in targeted geographic markets.

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 2024	200,000



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.
- Continue to integrate Google marketing into OTD Initiatives and Programs such as Welcome Centers, Scenic Byways, Civil War Trails, Network to Freedom members, etc.
- Implement destination development objectives that enhance the pathway to the marketplace and increase engagement in OTD programs and services.
- Promote and update our digital catalog “Give the Gift of Maryland” for major holidays.
- Promote ticketed events through #MarylandMondays giveaways.



Events Calendar

JULY 2023		
Destination International Annual Convention	18-20	Dallas, TX
Mid-Atlantic Tourism Public Relations Alliance Media Marketplace	JUL 31-AUG 2	Montgomery County, MD
AUGUST 2023		
Maryland Tourism Coalition-Summer Soiree	16	Ocean City, MD
Maryland Association of Counties Summer Conference	16-19	Ocean City, MD
Student Youth Travel Association Marketplace	18-22	Winnipeg, MB
Educational Seminars for Tourism Officers (ESTO) Conference	18-22	Savannah, GA
Virginia Motorcoach Association (with NC & SC)	23-25	Cherokee, NC
SEPTEMBER 2023		
Outdoor Writers of America Confernce	9-11	Gulf Shores, AL
Capital Region USA Global Travel Exchange	17-20	Annapolis, MD
Maryland Motorcoach Association Group Leader Marketplace	25-26	Lancaster, PA
OCTOBER 2023		
Dynamic Destinations Sales Mission	2-6	IL & WI
Greater New Jersey Motorcoach Association Marketplace	4-5	Atlantic City, NJ
Public Relations Society of America International's ICON 2023	15-17	Nashville, TN
Maryland Five-Star Event	19-22	Fair Hill, MD

NOVEMBER 2023		
Maryland Tourism Coalition Tourism & Travel Summit	8-10	Owings Mills, MD
National Tour Association Travel Exchange	12-15	Shreveport, LA
DECEMBER 2023		
Ontario Motor Coach Association Marketplace	11-13	Toronto Airport
Virginia Motorcoach 100th Anniversary Gala & Group Leader Expo	12-13	Richmond, VA
JANUARY 2024		
American Bus Association Marketplace	13-16	Nashville, TN
FEBRUARY 2024		
Great American Outdoor Show	3-11	Harrisburg, PA
MARCH 2024		
Pennsylvania Bus Association Marketplace	25-26	State College, PA
APRIL 2024		
Destination Capitol Hill		Washington, D.C.
Southeast Travel Counselors Alliance		Maryland
MAY 2024		
US Travel's IPW Marketplace	3-7	Los Angeles, CA
National Travel & Tourism Week	5-11	Statewide
JUNE 2024		
Pennsylvania Bus Association Annual Meeting/Sales Retreat	17-20	Ithaca, NY



OTD Checklist

Let the Maryland Office of Tourism help you find more customers.

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 present and accurate. info@visitmaryland.org
- ☐ Get help with writing your business listing content. Theresa Donnelly, 410-767-6296, theresa.donnelly@maryland.gov
- ☐ Add or edit 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 in advertising, website and social. 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 our branding and creative assets in your advertising. Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov
- ☐ Participate in sales missions and trade show outreach and receive tour leads. Rich Gilbert, 410-767-6288, rgilbert@visitmaryland.org
- ☐ 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. Marci Ross, marci.ross@maryland.gov