



Fiscal Year 2025 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.



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 three strategic objectives:

- MARKET EXPANSION
- LEVERAGING PARTNERSHIPS
- MAXIMIZING OPPORTUNITIES

Each department within the Office of Tourism has outlined their strategies within the objectives of this leading to:

- TRANSACTIONAL OUTCOMES



HARRIET TUBMAN
BORN ARAMINTA ROSS 1822
DORCHESTER COUNTY MARYLAND

Co-Chairs' Letter

It's time again to set our strategy for promoting tourism and travel in Maryland for the year. As Co-Chairs of the Maryland Tourism Development Board, we want to thank you for everything that you do for continuing to provide a positive Maryland tourism experience for our customers.

As we enter a new fiscal year, we continue to see our visitation and visitor spending numbers follow an upward path. Some 126,917 employees in tourism-related jobs around the state earn more than \$6 billion in wages that makes tourism the 11th largest private sector employer in the state.

On behalf of the Maryland Tourism Development Board, we would like to thank Governor Moore for his support of the tourism industry in Maryland. We appreciate his strong support and thank him for funding for the Maryland Tourism Development Board of \$13.5 million for FY 2025. 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 to support our tourism-related businesses and partners. Some of those initiatives are continuing to promote Maryland as the Most Powerful Underground Railroad Storytelling Destination in the World, touting our Trail System Second-to-None, Open Road Scenic Byways and the Chesapeake Bay Storytellers program.

We are proud of this Board's continuing work with the Office of Tourism, and are pleased to present the Fiscal Year 2025 Tourism Marketing and Development Plan. The objectives and strategies in this plan are designed to enhance tourism's positive impact in Maryland.

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



MS. MELONIE JOHNSON
Co-Chair, Maryland Tourism
Development Board

*President and Chief Operating Officer
MGM National Harbor*



MR. BEN SEIDEL
Co-Chair, Maryland Tourism
Development Board

*Founder, President and CEO
Real Hospitality Group (RHG)*



Situational Analysis

Fiscal Year 2025 Marketing Plan

Each year as we head into a new Fiscal Year, we re-examine our marketing plan and projections, to provide us with a road map that helps us evaluate available opportunities and build upon previously tried and successful approaches.

Several years ago, the Maryland Office of Tourism adopted a fresh tagline and positioning to market travel to the state with our “Maryland: You’re Welcome”. The Office of Tourism Development continues to see real success in advertising response, website 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 and built upon knowledge gleaned over the last year. We continue to build upon our leading five 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” messaging 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.

Throughout this marketing plan, you will learn how our team plans on continuing to build upon success, remain alert to sustainable trends, create 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

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 found that digital video continues to be one of the fastest growing channels in media, with ad spend increasing 15 percent in 2023 and projections estimating a 16 percent climb in 2024. 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 \$28.4 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 competing 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 footprint while we are doing the same in their market.



Situational Analysis

Richest Counties in the U.S.



The chart below showcases why the mid-Atlantic is a media environment land that advertisers and companies are targeting to purchase their goods and services. It is a fiercely competitive landscape for these wealthy consumers. The advertisers and companies are investing heavily in the same media outlets as Maryland is and we see it all the time during our consumption of media for upscale appliances, luxury jewelry and high-end cars.

Fifty percent of the richest counties in the United States are within Maryland's drive market and our tourism destinations within our region are investing their marketing dollars to encourage our residents to visit by advertising during Ravens and Orioles games, billboards along our interstate highways and in the digital world.

It is part of our marketing strategy to concentrate our marketing efforts in those activities that continue to deliver a \$30 to \$1 return on the state's marketing efforts.



The mid-Atlantic is a primary target market for tourism marketing efforts by not only Maryland but its competitors. Fifty-percent of the wealthiest household in the country are within Maryland's to immediate target market.

TOP 10 RICHEST COUNTIES IN THE U.S			
RANK	COUNTY	STATE	MEDIAN HOUSEHOLD INCOME
1	Loudoun County	Virginia	\$170,463
2	Falls Church	Virginia	\$164,563
3	San Mateo County	California	\$164,536
4	Santa Clara County	California	\$153,792
5	Fairfax County	Virginia	\$145,165
6	Marin County	California	\$142,971
7	Howard County	Maryland	\$140,971
8	Douglas County	Colorado	\$139,010
9	Nassau County	New York	\$137,709
10	Arlington County	Virginia	\$137,387

U.S. News and World Report, 2023



Situational Analysis

Visitor Profile

In 2023, Maryland welcomed 44.5 million domestic travelers (based on person-trips measurement) with total direct spending of \$14.9 billion dollars, 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. Direct spending increased by 4.1 percent compared

to 2022. Among the total, 78 percent, or 11.56 billion dollars were generated from Leisure travel, and the remaining 3.3 billion dollars (22%) were from business travel. The largest volume of our visitors to our state were leisure travelers at 36.5 million, which is 82 percent of all visitors. The remaining 18 percent, or 8 million were business travelers.

U.S AND MARYLAND VISITOR VOLUME COMPARISON (PERSON-TRIPS IN MILLIONS)								
	MARYLAND			% CHANGE	U.S.			% CHANGE
	2021	2022	2023	2023 VS 2022	2021	2022	2023	2023 VS 2022
TOTAL	34.97	42.94	44.45	3.5%	2,840.60	3,159.25	3,263.90	3.3%
BUSINESS	4.90	7.70	7.98	3.7%	543.44	691.28	731.72	5.9%
LEISURE	30.07	35.24	36.47	3.5%	2,297.16	2,467.97	2,532.17	2.6%
DAY	19.84	25.94	26.82	3.4%	1,636.78	1,849.22	1,964.62	6.2%
OVERNIGHT	15.13	17.00	17.63	3.7%	1,203.82	1,310.03	1,299.27	-0.8%

VISITOR VOLUME ESTIMATES - % OF TRAVELERS (SHARE)						
	MARYLAND			U.S.		
	2021	2022	2023	2021	2022	2023
BUSINESS	14.0%	17.9%	18.0%	19.1%	21.9%	22.4%
LEISURE	86.0%	82.1%	82.0%	80.9%	78.1%	77.6%
DAY	56.7%	60.4%	60.3%	57.6%	58.5%	60.2%
OVERNIGHT	43.3%	39.6%	41.5%	42.4%	39.7%	39.8%

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

VISITATION IS UP 3.3%



Situational Analysis

Visitor Profile



MULTI-NIGHT STAYS ARE A GOAL OF THE STATE'S MARKETING EFFORTS - THESE INCREASED 4 PERCENT

Overnight travel represents 39.7 percent of the state's total visitation, or 17.6 million travelers. In 2023, total visitation (44.5 million) exceeded 2022's volume (42.9 million); leisure travel increased by 3.5 percent; business travel increased by 3.7 percent; the day travel segments increased by 3.4 percent; and overnight travel segments increased by 3.7 percent. Maryland's visitor volume increased by 3.5 percent in total. At the national level, there was a 3.3 percent increase in visitor volume.

In 2023, national travel volume increased 3.3 percent compared to 2022, and the total domestic U.S. visitor volume, as measured in person-trips levels, reaching 3.26 billion, 104.7 million more visitors nationwide than in 2022. Leisure travel represented 78 percent of all person-trips, with day trips representing 60.2 percent and overnight representing 39.8 percent of visitor volume.

The breakdown of visitors to Maryland by day and overnight travel segments (person-trips) in 2023 is similar to that of the national level (about 60.3 percent day and 39.7 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 past years. In terms of their spending, leisure travelers contribute 78 percent to Maryland's Total Spending (\$14.86 billion) – up about 4.1 percent compared to 2022. Business travelers spent \$3.3 billion (22.2 percent), which is up 6.8 percent compared to 2022.



Situational Analysis

Trends and Comparisons

MARYLAND OUTPACED ITS COMPETITOR'S REGIONAL VISITOR VOLUME 2023

In the person-stays level, Maryland's visitation is 56 million. We saw a 2.2 percent increase in the state compared to 2022, and the visitation volume is twice as much as DC, WV, and

three times more than DE. Business travel had a 4.6 percent increase, leisure travel had a 1.7 percent increase. Overall, Maryland's travel and tourism had a steady growth in 2023.

VISITOR VOLUME ESTIMATES IN CALENDAR YEAR 2023 - (PERSON-TRIPS IN MILLIONS)							
	U.S.	MD	D.C.	DE	PA	VA	WV
PERSON-STAYS	YE 2023	YE 2023	YE 2023	YE 2023	YE 2023	YE 2023	YE 2023
TOTAL	3,965.59	56.16	24.01	13.76	149.45	91.00	25.83
BUSINESS	700.65	10.08	6.99	2.23	20.81	18.72	3.78
LEISURE	3,264.94	46.08	17.02	11.53	128.64	72.28	22.05
DAY	2,152.04	34.99	7.46	7.55	85.72	45.49	16.88
OVERNIGHT	1,813.55	21.17	16.55	6.21	63.73	45.51	8.95

PERCENT CHANGE FROM 2022 TO 2023 COMPETITORS REGIONAL VISITOR VOLUME							
	U.S.	MD	DC	DE	PA	VA	WV
TOTAL	1.4%	2.2%	15.8%	-2.0%	5.7%	5.1%	10.4%
BUSINESS	3.2%	4.6%	14.6%	1.3%	7.0%	15.4%	33.5%
LEISURE	1.0%	1.7%	16.4%	-2.6%	5.5%	2.7%	7.3%
DAY	2.7%	3.1%	3.5%	-0.9%	8.8%	8.5%	15.6%
OVERNIGHT	0.0%	0.7%	22.4%	-3.3%	1.8%	1.9%	1.9%

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.

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?

VISITATION TO MARYLAND'S FIVE TRAVEL REGIONS:
For purposes of conversation with our customers, Maryland is broken down into five regions, outlined below.

SHARE OF MARYLAND VISITATION				
MARYLAND DESTINATION REGIONS		2021	2022	2023
CENTRAL REGION	Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, and Howard counties	59.1%	59.0%	57.5%
CAPITAL REGION	Frederick, Montgomery, and Prince George's counties	16.0%	18.0%	18.1%
EASTERN SHORE	Caroline, Cecil, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico, and Worcester counties	18.5%	12.5%	16.6%
WESTERN MARYLAND	Allegany, Garrett, and Washington counties	3.3%	7.2%	4.7%
SOUTHERN REGION	Calvert, Charles, and St. Mary's counties	3.1%	3.3%	3.1%

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



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 come from the Washington, DC (Hagerstown, MD) DMA.
- The Philadelphia, NY, VA, Harrisburg-Lancaster, PA DMAs are key feeder markets for overnight trips (which involves a longer stay and increasing spending).

VISITORS COME FROM THESE 5 TOP DMA'S IN 2023

DMA* VISITOR VOLUME					
	2023			2022	
	% OF VISITORS TO MD	TOTAL VISITOR NUMBER (IN MILLIONS)		% OF VISITORS TO MD	TOTAL VISITOR NUMBER (IN MILLIONS)
Washington D.C.	29.9%	16.78	Washington D.C.	35.4%	19.46
Baltimore, MD	23.8%	13.34	Baltimore, MD	23.5%	12.90
Philadelphia, PA	10.0%	5.61	Harrisburg-Lancaster-Lebanon-York, PA	8.4%	4.59
Harrisburg-Lancaster-Lebanon-York, PA	6.4%	3.57	Philadelphia, PA	5.3%	2.91
New York, NY	5.9%	3.32	New York, NY	4.1%	2.27

* 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. The DMA® boundaries and data are owned by The Nielsen Company.



Situational Analysis

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

VISITORS COME FROM THESE 5 TOP DMA'S IN 2023

2023 VS 2022 DMA OF ORIGIN			
ORIGIN DMA 2023	OVERNIGHT	ORIGIN DMA 2022	OVERNIGHT
Washington, DC	15%	Washington, DC	16%
Baltimore, MD	13%	Baltimore, MD	15%
Philadelphia, PA	11%	Philadelphia, PA	10%
New York, NY	10%	New York, NY	7%
Harrisburg-Lancaster-Lebanon-York, PA	6%	Pittsburgh, PA	4%
Norfolk-Portsmouth-Newport News, VA	4%	Norfolk-Portsmouth-Newport News, VA	3%
Dallas-Fort Worth, TX	3%	Harrisburg-Lancaster-Lebanon-York, PA	3%
Los Angeles, CA	3%	Raleigh-Durham (Fayetteville), NC	2%
Richmond-Petersburg, VA	2%	Dallas-Fort Worth, TX	2%
Pittsburgh, PA	2%	Los Angeles, CA	2%

source: D.K. Shifflet and Associates, Ltd., with independent analysis by the Maryland Office of Tourism based on person - stays weight. * A designated market area (DMA), also referred to as a media market, is a region of the United States that is used to define television and radio markets.



Target marketing is specific markets has driven increases in overnight stays for the greatest return on investment of the state's marketing dollars.



Situational Analysis

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

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

MARYLAND/OCEAN CITY/BALTIMORE SHARE OF VISITS			
Based on Person-Stays Weight for 2023 (in million): 56.16 million - Visitation volume			
2023	MARYLAND	BALTIMORE	OCEAN CITY
Estimated Share of Visits		34.4%	8.3%
Estimated Person-Stays (Millions)	56.16	19.32	4.66
Average Travel Party Size	1.89	1.8	2.63
Average Length of Stay	1.28	1.22	2.28
Average Spending per Person per Day	\$128.55	\$150.77	\$135.80
Spending in MD per Travel Party	\$310.40	\$329.72	\$815.01

TOP 3 DMAS OF ORIGIN					
MARYLAND		BALTIMORE		OCEAN CITY	
Baltimore, MD	26.3%	Baltimore, MD	27.2%	Baltimore, MD	30.4%
Washington, DC (Hagerstown, MD)	23%	Washington, DC (Hagerstown, MD)	25.3%	Philadelphia, PA	24.9%
Philadelphia, PA	12.5%	Philadelphia, PA	10.4%	Washington, DC (Hagerstown, MD)	19.8%

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?

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 AND 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: Where do they come from and where do they go?

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. We have seen some changes since 2020, with men taking a large share of the trips made recent years. Maryland’s media buys are targeted at adults 25–64 but, with a strong skew toward: women; households with income (HHI) of \$75,000+; well-educated travelers; and those who working managerial and professional occupations. They have made an average trip of about one day within the United States in the past 12 months, including business, vacation, weekend travel and short trips.

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	54%	55%
FEMALE	46%	44%
AGE		
18 - 34	30%	25%
35 - 49	34%	27%
50 - 64	18%	25%
65+	18%	23%

- Stats show males took the large share of both day and overnight trips (54 percent & 55 percent) in 2023.
- Each age group of visitors takes about one-fourth of the share for the overnight trips.
- Visitors ages 35-49 represent a large share of both day and overnight trips (33 percent & 27 percent).
- Nearly 65 percent of the day trips and more than half of the overnight trips (52 percent) are made by visitors in the 18 to 49 age group.



Situational Analysis

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



DAY TRIP VS. OVERNIGHTS - INCOME		
INCOME	DAY TRIP	OVERNIGHT
Under \$50K	24%	17%
\$50K-\$74.9K	16%	14%
\$75K-\$99.9K	12%	12%
\$100K-\$149.9K	24%	27%
\$150K+	21%	28%

- Visitors to Maryland are affluent with half of the visitors having a household income of \$100,000 or more, with 24 percent earning more than \$150,000.

DAY TRIP VS. OVERNIGHTS - MARITAL STATUS		
MARITAL STATUS	DAY TRIP	OVERNIGHT
Married/Partnered	59%	63%
Never Married	33%	24%
Divorced/Widowed	8%	13%

- 60 percent of the day and overnight were made by married individuals or those with partners.

DAY TRIP VS. OVERNIGHTS - EDUCATION		
EDUCATIONAL ATTAINMENT	DAY TRIP	OVERNIGHT
High School Graduate	26%	28%
Some College	33%	25%
College Graduate	27%	25%
Post-Graduate	13%	21%

- Visitors to Maryland are well educated, 43 percent of day and overnight visitors have at least a college degree. 73 percent of visitors have attended an institution of higher learning.

DAY TRIP VS. OVERNIGHTS - EMPLOYMENT TYPE		
EMPLOYMENT	DAY TRIP	OVERNIGHT
Full-Time/Self-Employed	66%	68%
Not Employed/Retired	31%	30%

- 67 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?



DAY TRIP V. OVERNIGHTS - FAMILIES		
HOUSEHOLD SIZE	DAY	OVERNIGHT
1 Member	14%	13%
2 Members	29%	36%
3 Members	16%	16%
4 Members	22%	20%
5+ Members	20%	14%
Children Present in Travel Party	27%	26%

- Couples or parties of 2 members take large shares of both day trips and overnight trips (29 percent & 36 percent).
- Nearly 70 percent of day and overnight trips are taken by households with 2 to 4 members.
- Approximately 27 percent of households traveling to Maryland have children present.

TIME FRAME OF TRAVEL		
	DAY	OVERNIGHT
January–March	21%	23%
April–June	29%	28%
July–September	20%	26%
October–December	30%	24%

- Most day trips occur in the spring (April-June, 29 percent) and fall (October to December, 30 percent), while most overnight trips occur in spring and summer from April to September (54 percent).



Situational Analysis

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

One of the ways that the efforts of the marketing plan are tracked is through an annual economic impact study; Growth has been demonstrated in visitation and revenue.

Tourism Economics states that the increase in revenue is two-thirds driven by demand and one-third inflation.

KEY FINDINGS OF ECONOMIC IMPACT OF TOURISM IN MARYLAND 2023						
Tourism in Maryland	2018	2019	2020	2021	2022	2023
Total Visitors (Domestic & International)	41.9 million	42.1 million	24.7 million	35.2 million	43.5 million	45.1 million
Visitor Spending	\$18.1 billion	\$18.6 billion	\$11.6 billion	\$16.4 billion	\$19.4 billion	\$20.5 billion
Visitor Spending Growth	2.1%	3.0%	-37.6%	42.0%	18.4%	5.7%
Total Economic Impact	29.6 billion	30.3 billion	20.9 billion	26.4 billion	\$30.3 billion	\$31.4 billion
Fiscal Contributions (State & Local taxes)	\$2.5 billion	\$2.6 billion	\$1.7 billion	\$2.1 billion	\$2.3 billion	\$2.4 billion
Tax Savings (For each household)	\$1,140	\$1,175	\$775	\$923	\$999	\$1,027
Tourism Supported Jobs (Direct and Indirect)	226,235 jobs	226,427 jobs	166,000 jobs	173,700 jobs	187,296 jobs	190,660 jobs
Tourism Industry Employment (Direct jobs)	150,073 jobs	149,991 jobs	104,328 jobs	112,879 jobs	123,617 jobs	126,977 jobs
Direct Labor Income	\$6.5 billion	\$6.6 billion	\$4.9 billion	\$5.3 billion	\$6.0 billion	\$6.4 billion
Private Sector Employer in Maryland Ranking	10th	11th	12th	12th	10th	11th



Situational Analysis

Where do they come from?



DAY TRIP V. OVERNIGHTS – STATE OF ORIGIN				
TOP 8	DAY TRIP		TOP 10	OVERNIGHT
Maryland	56%		Maryland	21%
Pennsylvania	16%		Pennsylvania	17%
Virginia	9%		Virginia	10%
New Jersey	3%		New York	9%
District of Columbia	3%		New Jersey	6%
New York	3%		Texas	4%
West Virginia	3%		Florida	3%
Delaware	2%		California	3%
			North Carolina	3%
			West Virginia	2%

- Overnight travelers are a little more diversified with 15 percent coming from “longer” haul states such as Florida, California, and Texas.
- About 90 percent of day travelers come from Maryland and bordering states while 50 percent of overnight travelers come from these same states.



Situational Analysis

Where do our visitors stay and how do they get here?



ACCOMMODATIONS AND MODE OF TRANSPORTATION FOR ALL MD OVERNIGHT TRAVELERS			
ACCOMMODATIONS		MODE OF TRANSPORTATION	
Standard Hotel (Not Resort)	40.4%	Personal vehicle	66.5%
Friends'/Relatives' Dwelling	25.3%	Rental vehicle	10.1%
Suite & Resort Hotel	13.8%	Ride Sharing Service (Uber, Lyft, etc.)	6.1%
Condo/Home/Apartment (rental) (2012+)	12.5%	Airplane	5.0%
My 2nd Home/Apartment/Condo (2015+)	1.0%	Company/Work Vehicle (unaided 2012+)	3.5%
Other Paid Accommodation (B&B, Camp-site, Cabin/Lodge, Timeshare, Rented Home, Apt, Condo)	7.0%	Other Transportation	8.8%

Accommodations & Mode of Transportation for All MD Overnight Travelers

- Overnight travelers spend more dollars on paid accommodations, more than 80 percent of them stay in hotels, motels, resorts, and other paid accommodations.
- The main mode of transportation for 67 percent of overnight visitors is their personal automobile, 10 percent of the visitors use rental cars, 6 percent by ride sharing services (Uber, Lyft, etc.), and 5 percent by air.



Situational Analysis

What do our Visitors do?

TOP 15 ACTIVITIES OF LEISURE TRAVELERS

- The top 5 activities for both day and overnight travelers are: visiting friends and relatives, business/work, beach/waterfront, birthday celebration and anniversary celebration.
- Other activities, such as: Culinary - Dining Experience, holiday celebrations, festivals/fairs, amateur & professional sports, outdoor activities, tour/sightseeing, wedding, and medical/health/doctor visit are among the top 15 activities.

2023 VS 2022 TOP 15 ACTIVITIES FOR TRAVELERS			
2023	OVERNIGHT	2022	OVERNIGHT
Business/Work	17.3%	Visit Friends/Relatives (general visit)	14.1%
Visit Friends/Relatives (general visit)	14.3%	Beach/Waterfront	12.0%
Beach/Waterfront	11.3%	Business/Work	8.8%
Birthday Celebration	4.1%	Birthday Celebration	7.5%
Anniversary Celebration	3.3%	Nightlife (bar, nightclub, etc.)	4.1%
Other Personal Celebration (Birth, Engagement, etc.)	2.4%	Anniversary Celebration	3.8%
Holiday Celebration (Thanksgiving, 4th of July, etc.)	2.1%	Holiday Celebration (Thanksgiving, 4th of July, etc.)	3.6%
Wedding	2.1%	Funeral/Memorial	2.5%
Festivals/Fairs (state, craft, etc.)	1.8%	Amateur Sports (attend/participate)	2.5%
Shopping	1.7%	Touring/Sightseeing	2.3%
Boating/Sailing	1.7%	Theater/Dance Performance	2.2%
Historic Sites	1.7%	Live Music (festivals, concerts, clubs, etc.)	2.2%
Professional Sports Event	1.7%	Boating/Sailing	1.9%
Medical/Health/Doctor Visit	1.6%	Medical/Health/Doctor Visit	1.9%
Touring/Sightseeing	1.5%	Wedding	1.7%

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



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. Develop advertising and Content that support customer experiences, our top five differentiators 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 and promotions 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 branded 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 integration of Hispanic audience-targeted messaging across all media platforms.
- 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 (CRUSA) 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.



Strategic Objectives

Market Expansion

- Reach new audiences through new and enhanced tourism products that respond to travel motivators and include Maryland's differentiators.
- 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.
- Integrate Google marketing into OTD Initiatives and Programs such as Welcome Centers, Scenic Byways, Civil War Trails, Network to Freedom members, etc.
- Work with the Capital Region USA (CRUSA) to showcase Maryland as a desirable U.S. destination to international travelers in France, Germany and the UK.
- Support Canada-centric PR opportunities with our Canadian PR partner, REACH Global Marketing.
- Target audiences beyond Maryland's core feeder markets of Washington, D.C., Philadelphia, Pittsburgh, and New York City through social media engagement, media fam tours, and media pitches 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 \$10 million annually.
- Target national media to increase third-party editorial coverage by lifestyle outlets and other leisure outlets such as Food Network, Southern Living, Garden & Gun, Travel Channel, Travel + Leisure, National Geographic, Conde Nast Traveler.
- Increase customer interactions through participation in Trade and Consumer shows.
- Increase awareness of Maryland as a destination of choice for international travel trade through participation in targeted U.S.-based international travel marketplaces, fam tours and other promotional activities. Maintain partnership with 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 Scenic Byway, Maryland's Crab & Oyster Trail, Trail System Second-to-None, and the Great Chesapeake Bay Loop.
- Continue to maintain and upgrade our state Welcome Centers as story-telling destinations.
- Work with OTD interactive/content 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 and multi-night stays. 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 the research unit and product development unit 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.
- Deploy and cross-purpose our evolving video assets to strategically integrate with ongoing messaging and social media outreach.
- Develop programs and products linking and showcasing Maryland's differentiating visitor experiences and businesses. Programs and products include but are not limited to:
 - Great Chesapeake Bay Loop
 - Maryland: Most Powerful Underground Railroad Storytelling Destination in the World
 - Maryland Scenic Byways and Civil War Trails
 - Maryland's Trail System Second-to-None
 - Maryland Civil Rights Initiative
 - Maryland's American Indian/ Indigenous Peoples
 - Accessible Maryland
 - African-American Heritage



Strategic Objectives

Maximizing Opportunities

- 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, Maryland's Trail System Second-to-None, Great Chesapeake Bay Loop, Scenic Byways, Fish & Hunt Maryland, etc.) 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.
- Create and promote compelling and trending social media content
- Share user-generated content to promote a sense of community and authenticity
- Prioritize video content (short form/reels) for social media posts and web content.
- Amplify national holidays and themed days, weeks, months to boost tourism in Maryland.
- Continue to educate and inspire travel, while building upon our established trust and credibility with our followers
- 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.
- Continue to integrate Google marketing into OTD initiatives and programs such as Welcome Centers, 18 Scenic Byways, Civil War Trails, etc.
- Promote and update our digital catalog "Give the Gift of Maryland" and promote ticketed events through #MarylandMondays giveaways.
- Offer resources, research, opportunities and information on industry.visitmaryland.org



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 outside partners, the Office of Outdoor Recreation, Department of Natural Resources, and Department of Agriculture to promote our Maryland Flyfishing Trail, Catfish Trail, Deer Hunting Trail, and other products.
- 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 products, 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.
- 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.
- Develop tourism products and promotions with collaborative partners, such as Network to Freedom sites, DMOs, heritage area managers, the National Park Service and tourism businesses.
- Administer database programming in support of OTD marketing and development activities, businesses, events and deals.
- Implement destination development objectives that enhance the pathway to the marketplace and increase industry engagement in OTD programs and services.



Strategic Objectives

Leveraging Partnerships

- Provide marketing, event support, and media coverage for new partner programming and special anniversary events including but not limited to, National Travel & Tourism Week, the 5th Annual International Underground Railroad Month, Maryland Horse Month, Chesapeake Bay Storytellers, and Fish & Hunt Maryland.
- Work with Maryland Public Television and Mainstreet Maryland to produce new episodes of the Destination Maryland series.
- 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.
- Support DMO and industry partners' initiatives by amplifying their messaging
 - Include brand hashtags in our posts
 - Share posts to our feed and stories
 - Host Instagram takeovers and collabs
- Work with sister state agencies, DMOs and industry partners to produce short-form videos showcasing state travel experiences, multi-night stays, and destinations. These videos will be used on social media, media pitches and on VisitMaryland.org to entice tourists to visit the state.
- Showcase the Maryland Office of Tourism value to its stakeholders to promote their goods and services by producing various owned assets.

PUBLICATION	AUDIENCE	DISTRIBUTED	QUANTITY
Visit Maryland Now! e-newsletter	Consumer	Monthly	140,000+
Insights 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
Destination Maryland	Consumer	April 2025	200,000

* Find these publications and more to order on industry.maryland.org



Industry Events Calendar

JULY 2024		
Mason-Dixon Outdoor Writers Annual Conference	12-14	Clear Spring, MD
Destination International Annual Convention	16-18	Tampa, FL
AUGUST 2024		
Student Youth Travel Association Marketplace	9-13	New York, NY
National Council of State Tourism Directors	10-13	Columbus, OH
Educational Seminars for Tourism Officers (ESTO) Conference	11-13	Columbus, OH
Maryland Tourism Coalition-Summer Soiree	14	Ocean City, MD
Maryland Association of Counties Summer Conference	14-17	Ocean City, MD
Mid-Atlantic Tourism Public Relations Alliance Media Marketplace	27-29	Roanoke, VA
Virginia Motorcoach Association (with NC & SC)	27-30	Williamsburg, VA
SEPTEMBER 2024		
Capital Region USA Global Travel Exchange	16-18	Charlottesville, VA
Greater Northeast Motorcoach Association Marketplace	18-19	Atlantic City, NJ
Outdoor Writers Association of America Conference	20-22	El Paso, TX
Maryland Motorcoach Association Group Leader Marketplace	23-24	Hagerstown, MD
OCTOBER 2024		
Dynamic Destinations Sales Mission	TBD	TBD
Public Relations Society of America International's ICON 2023	15-17	Anaheim, CA
Maryland Five-Star Event	17-20	Fair Hill, MD

NOVEMBER 2024		
Ontario Motor Coach Association Marketplace	4-6	Windsor, ON
Maryland Tourism Coalition Tourism & Travel Summit	6-8	Belcamp, MD
National Tour Association's Travel Exchange	17-20	Huntsville, AL
FEBRUARY 2025		
America Bus Association Marketplace	1-4	Philadelphia, PA
Great American Outdoor Show	1-9	Harrisburg, PA
United Motorcoach Association Expo	24-25	Oklahoma City, OK
MARCH 2025		
Pennsylvania Bus Association Marketplace	24-25	Manhiem, PA
APRIL 2025		
Destination Capitol Hill	TBA	TBA
Southeast Travel Counselors Alliance	TBA	TBA
MAY 2025		
National Travel & Tourism Week	5-11	Statewide
JUNE 2025		
US Travel's IPW Marketplace	14-18	Chicago, IL
Pennsylvania Bus Association Annual Meeting/Sales Retreat	TBA	TBA



Ways to Work with Us

We're here to support you as you build your business and welcome visitors to Maryland.

Partner with the Maryland Office of Tourism to market your destination/attraction/business and 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 with our sales, marketing, and destination development initiatives.

- ☐ 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
- ☐ Review VisitMaryland.org to make sure your business listing is present and accurate. Add or edit your business listing, upload 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
- ☐ Market your stories through the National UGRR Network to Freedom, National Civil Rights Network, Chesapeake Bay Gateways, Civil War Trails programs, and Maryland's Indigenous Peoples programs. Anne Kyle, 410-767- 0696, anne.kyle@maryland.gov
- ☐ Use our branding and creative assets in your advertising. Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov and share your creative assets, Daesha Elliott, 410-767-6293, daesha.stark@maryland.gov
- ☐ Link your website to 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
- ☐ Find opportunities, resources, marketing plans, research, press releases, e-newsletters, links and more on the Maryland Office of Tourism industry website Industry.VisitMaryland.org, Lisa Hansen Terhune, 410-699-3711, lisa.hansenterhune@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
- ☐ Follow @TravelMD (Facebook/Twitter) and @visitmaryland (Instagram) and use our hashtag #MDinFocus on social media
- ☐ Provide tickets/prizes for #MarylandMondays giveaways. Leslie Troy, 410-767-6298, ltroy@visitmaryland.org
- ☐ 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
- ☐ Participate in sales missions and trade show outreach and receive tour leads. Rich Gilbert, 410-767-6288, rgilbert@visitmaryland.org
- ☐ 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



Utilize the resources and information on the Maryland Office of Tourism industry website, Industry.VisitMaryland.org