



**MARYLAND
TRAVEL AND
TOURISM
SUMMIT**

2023





Maryland Department of Commerce Office of Tourism and Film

**Liz Fitzsimmons
Managing Director**



TOURISM:

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



Maryland's Scenic Byways: Baltimore's Historic Charles Street



Mission Statement

OTD 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.

Vision Statement

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



Measurable Objectives

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

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





Maryland Tourism Development Board



data driven - heart-led

ROI

Visitation

OPR

OPM

Visitor
Spending

Economic Impact



Maryland's Leading Five Differentiators

1. The Most Powerful Underground Railroad Storytelling Destination in the World
2. The Great Chesapeake Bay Loop
3. Maryland's Trail System Second-to-None
4. 18 Scenic Byways
5. Fish & Hunt Maryland



Competitors Prospecting in our Region

State	Marketing Budget 2023
Florida	\$54,456,106
New Jersey	\$25,000,000
West Virginia	\$23,467,111
Puerto Rico	\$17,600,000
South Carolina	\$14,052,826
Virginia	\$8,487,000
Maryland	\$11,450,000

MediaRadar Insights on Travel Advertising in 2022

Through October 2022, travel advertisers invested \$3.7b in ads, representing a 55% YoY; the average monthly investment increased by almost 66%.



FY2023 Direct Tourism Consumption Taxes

FISCAL YEAR 2023 DIRECT TOURISM CONSUMPTION TAXES

Across the state, county to county, no matter the region, visitor spending makes a significant impact. The following chart details how tourism supported the tax base in

Maryland's 23 counties and Baltimore City, broken out by geographic region, and the state's MTDB investment in local marketing plans.

COUNTIES	ADJUSTED TAX	COUNTY TOURISM BUDGET FY 2023	MD TOURISM DEVELOPMENT BOARD GRANT AWARDED FY 2023*			
ALLEGANY	\$	\$660,000	\$356,560			
GARRETT	\$	\$1,193,128	\$797,385			
WASHINGTON	\$	\$1,161,123	\$298,663			
WESTERN REGION	\$	\$3,020,251	\$1,452,608			
FREDERICK	\$	\$2,018,732	\$463,819			
MONTGOMERY	\$	\$2,295,834	\$385,006			
PRINCE GEORGE'S	\$	\$2,388,000	\$266,324			
CAPITAL REGION	\$	\$6,702,566	\$1,715,150			
ANNE ARUNDEL	\$	\$3,370,000	\$333,403			
BALTIMORE CITY	\$	\$15,303,780	\$267,086			
BALTIMORE COUNTY	\$	\$1,415,880	\$131,387			
CARROLL	\$	\$423,410	\$233,122			
HARFORD	\$	\$645,000	\$408,669			
HOWARD	\$	\$1,326,677	\$562,298			
CENTRAL REGION	\$	\$22,484,747	\$1,935,965			
CALVERT	\$	\$460,673	\$183,576			
CHARLES	\$	\$826,000	\$506,464			
ST. MARY'S	\$	\$400,194	\$513,110			
SOUTHERN REGION	\$	\$1,686,867	\$1,213,150			
CAROLINE	\$	\$103,168	\$120,000			
CECIL	\$	\$795,062	\$290,614			
DORCHESTER	\$	\$388,264	\$259,248			
KENT	\$	\$312,986	\$232,896			
QUEEN ANNE'S	\$	\$869,963	\$154,862			
SOMERSET	\$	\$316,686	\$121,496			
TALBOT	\$	\$656,623	\$502,878			
WICOMICO	\$	\$1,958,459	\$1,012,508			
WORCESTER	\$	\$1,347,487	\$1,957,871			
OCEAN CITY	\$	\$10,217,771	\$180,754			
EASTERN SHORE	\$	\$16,966,489	\$4,783,126			
STADIUM AUTHORITY	\$					
OTHER		\$59,067,714				
TOTAL DIRECT CONSUMER TAXES	\$84,518,847	\$189,102,509	\$600,703,266	\$874,324,623	\$50,860,919	\$10,500,000

THERE IS MORE THAN \$600 MILLION IN TOURISM TAXES COLLECTED THROUGHOUT MARYLAND AND \$66 MILLION IN STATE AND LOCAL TOURISM BUDGETS

* Comptroller-designated tourism taxes.

Due to rounding, some numbers might not sum.

THERE IS MORE THAN \$600 MILLION IN TOURISM TAXES COLLECTED THROUGHOUT MARYLAND AND \$66 MILLION IN STATE AND LOCAL TOURISM BUDGETS.



Competitive Environment

Rate of Visitation Growth

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.



Maryland's Scenic Byways: Horses & Hounds



DMA of Origin 2022

DAY TRIP VS. OVERNIGHT – DMA OF ORIGIN

Origin DMA	DAY	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%

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.

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



What do Our Visitors do?

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



Economic Impact of Tourism in Maryland 2022

Tourism in MD	2018	2019	2020	2021	2022
Total Visitors (Domestic & International)	41.9 million	42.1 million	24.7 million	35.2 million	43.5 million
Visitor Spending	\$18.1 billion	\$18.6 billion	\$11.6 billion	\$16.4 billion	\$19.4 billion
Visitor Spending Growth	2.1%	3.0%	-37.6%	42.0%	18.4%
Total Economic Impact	\$29.6 billion	\$30.3 billion	\$20.9 billion	\$26.4 billion	\$30.3 billion
Fiscal Contributions (State & local taxes)	\$2.5 billion	\$2.6 billion	\$1.7 billion	\$2.1 billion	\$2.3 billion
Tax Savings (For each household)	\$1,140	\$1,175	\$775	\$923	\$999
Tourism Supported Jobs (Direct and Indirect)	226,235 jobs	226,427 jobs	166,000 jobs	173,700 jobs	187,296 jobs
Tourism Industry Employment (Direct jobs)	150,073 jobs	149,991 jobs	104,328 jobs	112,879 jobs	123,617 jobs
Private sector employer in Maryland ranking	10th	11th	12th	12th	10th

Source: D.K. Shifflet, *Tourism Economics*



Maryland Visitor Volume and spending

Amounts in millions of visitors, \$ millions, and \$ per visitor

	2018	2019	2020	2021	2022
Total visitors	41.9	42.1	24.7	35.2	43.5
Day	21.6	22.3	13.3	19.8	25.9
Overnight	20.3	19.8	11.4	15.4	17.6
Total visitor spending	\$18,050	\$18,590	\$11,620	\$16,392	\$19,402
Day	\$3,008	\$3,071	\$1,758	\$3,667	\$4,695
Overnight	\$15,042	\$15,519	\$9,862	\$12,725	\$14,707
Per visitor spending	\$431	\$441	\$470	\$466	\$446
Day	\$139	\$138	\$133	\$185	\$181
Overnight	\$741	\$784	\$855	\$830	\$836

Source: D.K. Shifflet, *Tourism Economics*





Fall and Holiday Travel Season Outlook Remains Strong As Leisure Travelers Are Motivated to Spend More Time With Family and Friends

- 50 percent of American travelers say they will take their next trip within the next 90 days, as overall demand remains near survey-record highs with 92 percent indicating plans to go somewhere in the next six months.
- When asked about their main motivation for leisure travel, spending time with their immediate family/children was listed as the top reason (20%). Seeking out new experiences (19%), seeking a fun time (18%), seeking rest and relaxation (17%), and spending time with friends and relatives (16%) round out the top five.
- Looking ahead to the upcoming Holiday Travel Season, 31% of American travelers indicate plans to travel more this Holiday Season compared to last year, with 57% planning about the same amount, and 12% planning to travel less.
 - As for Holiday Travel Season spending, 33% of American Travelers who are going somewhere said they plan to spend more on their Holiday travels this year than last year (up from 24% the prior year). 52% plan to spend about the same amount and 16% say they will spend less than last year.



Marketing & Content

2023 “Welcome Home for the Holidays”

- Digital advertising campaign to encourage overnight hotel stays for the holidays and corresponding deals & discounts at hotels; as well as retail, restaurants and attractions
- Runs for five weeks mid-November through mid-December
- Resumes in late January to run through late February to emphasize deals and discounts
- Creative being redone to align with new “You’re Welcome” branding
- Last year’s campaign excelled in performance, generating \$2.3M in hotel revenue through measurable digital media and delivering a \$26:1 ROI
- Industry outreach conducted through email, direct mail and DMOs to recruit Deals and Discounts



***Last year's campaign
revenue: \$2.3 million.
ROI \$26 to \$1.***



“You’re Welcome”

New Branding for Maryland Tourism Marketing

- Starting in the spring of 2023, we evolved all branding for marketing purposes from “OPEN” to “You’re Welcome.”
- New branding toolkits were made available DMO partners for use in creating their own branding going forward
- Welcome Centers graphics will be updated in Q1 of 2024 accordingly







Tourism Development-2024

Maryland's Year of Civil Rights

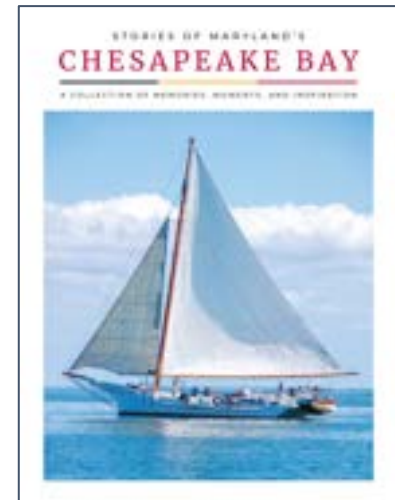
- Collaboration with MD Commission of African American History and Culture, state agencies, DMOs, Heritage Areas, private sector businesses, etc.
- Inspirational overnight travel opportunities will be market-ready in time for the 7/2/24 60th Anniversary of 1964 Civil Rights Act



Eastern Shore Civil Rights storytelling sign

Great Chesapeake Bay Loop

- Collaboration with NPS Chesapeake Gateways, certified Storytellers, DMOs, Heritage Areas, private sector businesses, etc.
- New products include video, printed guide, and online content
- Spring/Summer multi-platform co-op Ad Campaign to help increase mid-week travel



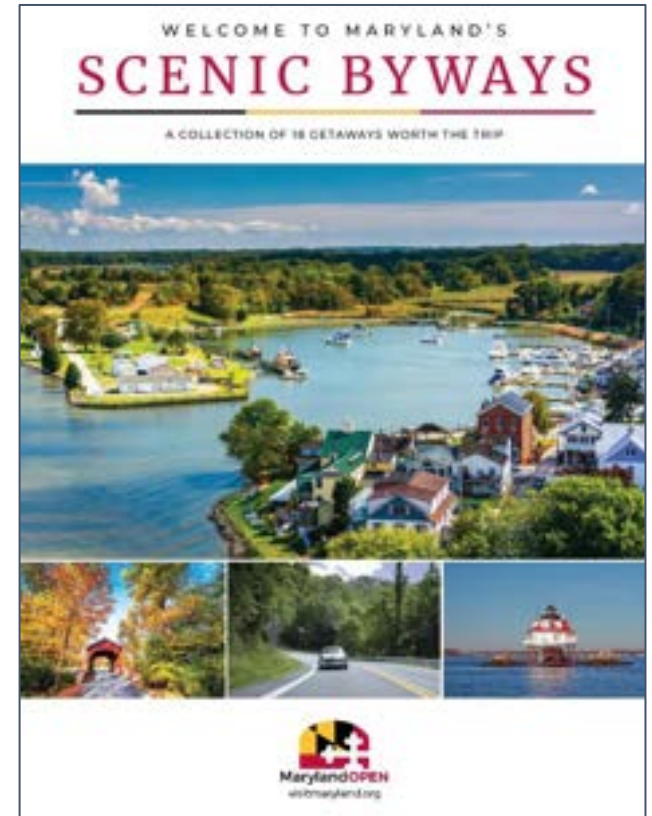
Current CB travel guide



Tourism Development-2025

25th Anniversary of Maryland Scenic Byways

- 80% funded by Federal Highway Administration - \$824,000 grant + \$363,000 OTD match = \$1,187,000 investment
- Statewide collaboration with MDOT, DNR, DMOs, Heritage Areas, private sector businesses, etc.
- Adding sustainability, seasonality and belong-ability to all written, online and digital content
- New products include printed guide/map, videos, photos and exterior exhibits at the I-70 E/W and Sideling Hill WCs
- Target launch date is 4/5/25 - National Road A Road Map Day
- Social media posting strategy focusing on alternate Scenic Sundays and Wanderlust Wednesdays, Open Roads co-op Ad Campaign



The MD SB Guide is the most distributed printed collateral piece behind Destination Maryland with more than 500,000 distributed world-wide in the 22 years.





Immerse yourself in The Chesapeake Bay's watermen culture



Southern Living



Md. Launches Nation's First State Fly Fishing Trail

Fodor's Travel



US News



The Telegraph

TRAVEL+ LEISURE

Condé Nast Traveler

Maryland Tourism Reports Increases In Visitors and Visitor Spending

The Chesapeake Bay is Maryland's beating heart. While you can admire spectacular coastal towns and natural seaside beauty from the shore, the best way to experience America's largest estuary is to climb aboard a historic skipper and work alongside the watermen who have been harvesting oysters, crabs and fish for generations.



NATIONAL GEOGRAPHIC

The Ultimate Guide to Summer Getaways and Adventures Near DC

Your next outdoor escape is just a short drive away.

TORONTO STAR

thrillist



Maryland's Smith Island Cake Has A Romantic History

Nothing says love like delivery baked this layer of yellow cake studded with coconut fudge frosting.



WASHINGTONIAN

AAA WORLD

Path to freedom: Exploring the landscapes and legacy of Frederick Douglass from the Eastern Shore to Baltimore

By Donna M. Owens
For The Baltimore Sun • Published: Aug 11, 2022 at 7:00 am

WINE ENTHUSIAST



lonely planet



“Social”ly Speaking

Instagram Takeovers



visitmaryland • Follow
Harford County, Maryland

visitmaryland • Fall foliage in Harford County is something to be excited about 🍂

Watch the Autumn leaves fall in any of our gorgeous parks, trails, nature reserves, or gardens. The views at Susquehanna State Park this time of year are just incredible. Find more Harford County travel ideas at @visitharford

📸 @trendingbesidephotography via @visitharford

#VisitHarford #VisitMaryland #MDInFocus

803 likes
SEPTEMBER 30



visitmaryland • Follow
Galeo-Cencato • Seaside (Instrumental)

visitmaryland • Set sail with Schooner Woodwind, Annapolis Sailing Cruises!

- 🚩 Two-hour public sailing cruises starting at the Annapolis Waterfront Hotel, the Woodwinds sail up to four times a day. Each trip is a unique hands-on experience. Help hoist the sails or take a turn at the wheel.
- 🚩 Privately charter the entire boat for an event or corporate outing.
- 🚩 Become part of the guest crew during exhilarating Schooner Races.
- 🚩 Learn about the ecology of the Bay and the history of the region from a certified Chesapeake Bay Storyteller!

318 likes
AUGUST 1

Short-Form Video

Celebration of National and State Holidays



visitmaryland • Follow
Original audio

visitmaryland • Happy #WorldTourismDay! 🌍 Let's celebrate the joy of travel and discovery. We invite you to explore the charm of our state, from small towns steeped in history to scenic trails to freshly caught crabs from the Chesapeake Bay. Pack your bags and find what makes Maryland uniquely unforgettable! 📍 in bio for more info! #MDInFocus #VisitMaryland

402 likes
SEPTEMBER 27

Maryland • March 8 • 12

#MarylandMondays giveaway: Enter for a chance to win a pair of tickets to the Maryland Day Festival, an epic celebration of everything Maryland on Saturday, March 25 at POWER PLANT LIVE!

Enter here: <https://woodbox.com/m287s>

The contest ends 03/12.
Winner notified via email.
Transparent Events
Visit Baltimore

An Everything MARYLAND Celebration

MARYLAND DAY FESTIVAL

POWER PLANT LIVE! FOUNDATION EVENTS

40+ LIVE MD BANDS & DJs ON 6 STAGES - TASTY FOOD VENDORS & BREWERIES
MD CRAFTERS, CREATORS, VENDORS - GAMES & CONTESTS
ORANGE CRUSH WELCOME DRINK - THE ORIOLE BIRD & MORE SPECIAL GUESTS - ALL AGES

SATURDAY, MARCH 25 at POWER PLANT LIVE!

16 comments 18 shares

#MarylandMondays Giveaways



Social Media Audience

The Maryland Office of Tourism has nearly 270,000 followers across three major social media platforms.



115K



99K



56K

#MDinFocus







Maryland

OFFICE OF TOURISM

Thank you

Travel Trade Sales



Global Travel Exchange



Public Relations - FY23 Highlights

\$108,062,892

Earned Media Value

4,505,119,938

Audience/Circulation

1850+

Media Placements

450+

Direct Media Interactions

40+

Supported Media Visits

International Efforts

Canada, UK, Germany, France

