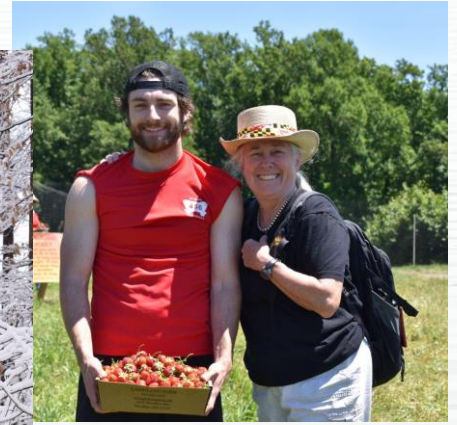




STATE OF THE STATE November 6, 2024





**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.



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.

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.



Three Measurable Objectives = One Outcome

- **MARKET EXPANSION**

Promotional pushes in Cleveland, Pittsburgh and New York metro and increasing consumer awareness in LGBTQ+, Hispanic and African-American markets

- **LEVERAGING PARTNERSHIPS**

Working with the public and private sectors to generate multi-night stays

- **MAXIMIZING OPPORTUNITIES**

Looking for those events, trends and opportunities to showcase Maryland in a positive light - domestically and internationally



TRANSACTIONAL OUTCOMES =

CUSTOMERS SPENDING TIME AND MONEY IN OUR STATE

Maryland's Leading Five Differentiators

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

Annual Report

Featured updates:

- Last year's Spring/Summer campaign ROI was \$34 to \$1
- New Chesapeake Bay Loop Travel Guide published; also a set of short-form videos produced and workshops conducted
- First-ever OTD "Virtual Visit" with partners and DMOs
- Public Relations: \$55 million in earned media

MARYLAND

FISCAL YEAR 2024
TOURISM DEVELOPMENT BOARD
ANNUAL REPORT

PUBLISHED BY THE MARYLAND TOURISM DEVELOPMENT BOARD
AND THE MARYLAND DEPARTMENT OF COMMERCE



Competitive Marketplace Marketing Budget

| Organization | Marketing Budget 2024 |
|---------------------------------|-----------------------|
| Visit California | \$136.6 Million |
| Visit Florida | \$80 million |
| Destination DC | \$45 Million |
| NYS Division of Tourism | \$40 Million |
| WV Department of Tourism | \$31.3 million |
| Pennsylvania Tourism Office | \$15 million |
| Maryland Office of Tourism | \$10.7 million |
| NJ Division of Travel & Tourism | \$10.5 Million |
| Virginia Tourism Authority | \$9.5 million |

\$13.3 million is disbursed to the Maryland Tourism Development Board (MTDB) for the purpose of tourism promotion. Of that \$13.3 million, \$2.5 million is distributed to the 25 State of Maryland-recognized Destination Marketing Organizations (DMOs) through a competitive grant formula.

Advertising in the major markets:

Baltimore, DC, Harrisburg, Philadelphia, Pittsburgh, NYC Metro, and Cleveland.



WHAT DO WE DO?

- WHY market Maryland to travelers?
- HOW does Maryland compare?
- WHERE do visitors come from?
- WHERE do they go?
- WHAT do they do?

SUPPORTING YOUR BUSINESS

- VisitMaryland.org - 3 million visitors annually
- Partner Referrals - 600,000 referrals annually
- Paid Advertising - \$33:1 ROI
- #MDinFocus gets you tagged
- Eight (8) Welcome Centers - Your Front Line Sales Staff
- Providing detailed visitor research
- Asset Resources (video, images, sizzle reels & more)
- Product/Destination Development guidance
- \$55+ Million in travel media impact

MARYLAND & U.S. VISITATION VOLUME PERCENT CHANGE 2023 (Person-trips, in millions)

| | Maryland | | | | % Change | U.S. | | | | % Change |
|------------------|----------|-------|-------|-------|--------------|----------|----------|----------|----------|--------------|
| | 2020 | 2021 | 2022 | 2023 | 2023 vs 2022 | 2020 | 2021 | 2022 | 2023 | 2023 vs 2022 |
| TOTAL | 24.54 | 34.97 | 42.94 | 44.45 | 3.5% | 2,124.57 | 2,840.60 | 3,159.25 | 3,263.90 | 3.3% |
| BUSINESS | 3.38 | 4.90 | 7.70 | 7.98 | 3.7% | 342.99 | 543.44 | 691.28 | 731.72 | 5.9% |
| LEISURE | 21.15 | 30.07 | 35.24 | 36.47 | 3.5% | 1,781.58 | 2,297.16 | 2,467.97 | 2,532.17 | 2.6% |
| DAY | 13.19 | 19.84 | 25.94 | 26.82 | 3.4% | 1,244.88 | 1,636.78 | 1,849.22 | 1,964.62 | 6.2% |
| OVERNIGHT | 11.34 | 15.13 | 17.00 | 17.63 | 3.7% | 879.69 | 1,203.82 | 1,310.03 | 1,299.27 | -0.8% |

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

Competitors' Visitation Volume in 2023 (Person-stays, in millions)

| 2023 | U.S. | MD | DC | 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 | 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 |

| 2022 | U.S. | MD | DC | 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 | 6.1 | 2.2 | 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 | 14.6 |
| Overnight | 1,814.30 | 21.03 | 13.52 | 6.42 | 62.6 | 44.68 | 8.78 |

- In 2023, Maryland's visitation by person-stays measurement is 56 million.
- Maryland's visitation volume is double than DC, WV, and 3 times more than DE.
- The total visitation volume increased 2 percent,
- Business travel had a 5 percent increase,
- Leisure travel had a 2 percent increase.

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

2023 vs 2022 Top 10 Origin DMA*

| OVERNIGHT – DMA OF ORIGIN | | | |
|---------------------------------------|-----------|---------------------------------------|-----------|
| 2023 | | 2022 | |
| Origin DMA | OVERNIGHT | Origin DMA | OVERNIGHT |
| Washington, DC (Hagerstown, MD) | 15% | Washington, DC (Hagerstown, MD) | 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 & Associates, Ltd. with independent analysis by the Maryland Office of Tourism based on person-stays.

* 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.

MARYLAND VISITOR ANALYSIS - SHARE OF MARYLAND VISITATION IN 2023

| MARYLAND DESTINATION REGIONS | | 2019 | 2020 | 2021 | 2022 | 2023 |
|------------------------------|---|-------|-------|-------|-------|-------|
| CENTRAL | ANNE ARUNDEL, BALTIMORE CITY, BALTIMORE, CARROLL, HARFORD, HOWARD COUNTIES | 55.2% | 30.3% | 59.1% | 59.0% | 57.5% |
| CAPITAL | FREDERICK, MONTGOMERY, PRINCE GEORGE'S COUNTIES | 17.5% | 20.9% | 16.0% | 18.0% | 18.1% |
| EASTERN SHORE | CAROLINE, CECIL, DORCHESTER, KENT, QUEEN ANNE'S, SOMERSET, TALBOT, WICOMICO, WORCESTER COUNTIES | 18.8% | 37.9% | 18.5% | 12.5% | 16.6% |
| WESTERN MARYLAND | ALLEGANY, GARRETT, WASHINGTON COUNTIES | 5.1% | 8.2% | 3.3% | 7.2% | 4.7% |
| SOUTHERN | CALVERT, CHARLES, ST. MARY'S COUNTIES | 3.4% | 2.7% | 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

2023 vs 2022 Top 15 Activities for Travelers*

| 2023 | Overnight | 2022 | Overnight |
|---|-----------|---|-----------|
| Business/Work | 17% | Visit Friends/Relatives (general visit) | 14% |
| Visit Friends/Relatives (general visit) | 14% | Beach/Waterfront | 12% |
| Beach/Waterfront | 11% | Business/Work | 9% |
| Birthday Celebration | 4% | Birthday Celebration | 8% |
| Anniversary Celebration | 3% | Nightlife (bar, nightclub, etc.) | 4% |
| Other Personal Celebration (Birth, Bachelor/Bachelorette, Engagement, Showers etc.) | 2% | Anniversary Celebration | 4% |
| Holiday Celebration (Thanksgiving, 4th of July, etc.) | 2% | Holiday Celebration (Thanksgiving, 4th of July, etc.) | 4% |
| Wedding | 2% | Funeral/Memorial | 3% |
| Festivals/Fairs (state, craft, etc.) | 2% | Amateur Sports (attend/participate) | 3% |
| Shopping | 2% | Touring/Sightseeing | 2% |
| Boating/Sailing | 2% | Theater/Dance Performance | 2% |
| Historic Sites | 2% | Live Music (festivals, concerts, clubs, etc.) | 2% |
| Professional Sports Event | 2% | Boating/Sailing | 2% |
| Medical/Health/Doctor Visit | 2% | Medical/Health/Doctor Visit | 2% |
| Touring/Sightseeing | 2% | Wedding | 2% |

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



Key Findings of Economic Impact of Tourism in MD 2023

| Tourism in MD | 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 |

Sources: *Tourism Economics*

The direct link to download the Economic Impact of Tourism in Maryland Report 2023's pdf file: <https://www.visitmaryland.org/sites/default/files/2024-09/Economic-Impact-of-Tourism-in-Maryland-%20State-2023-CLIENT.pdf>



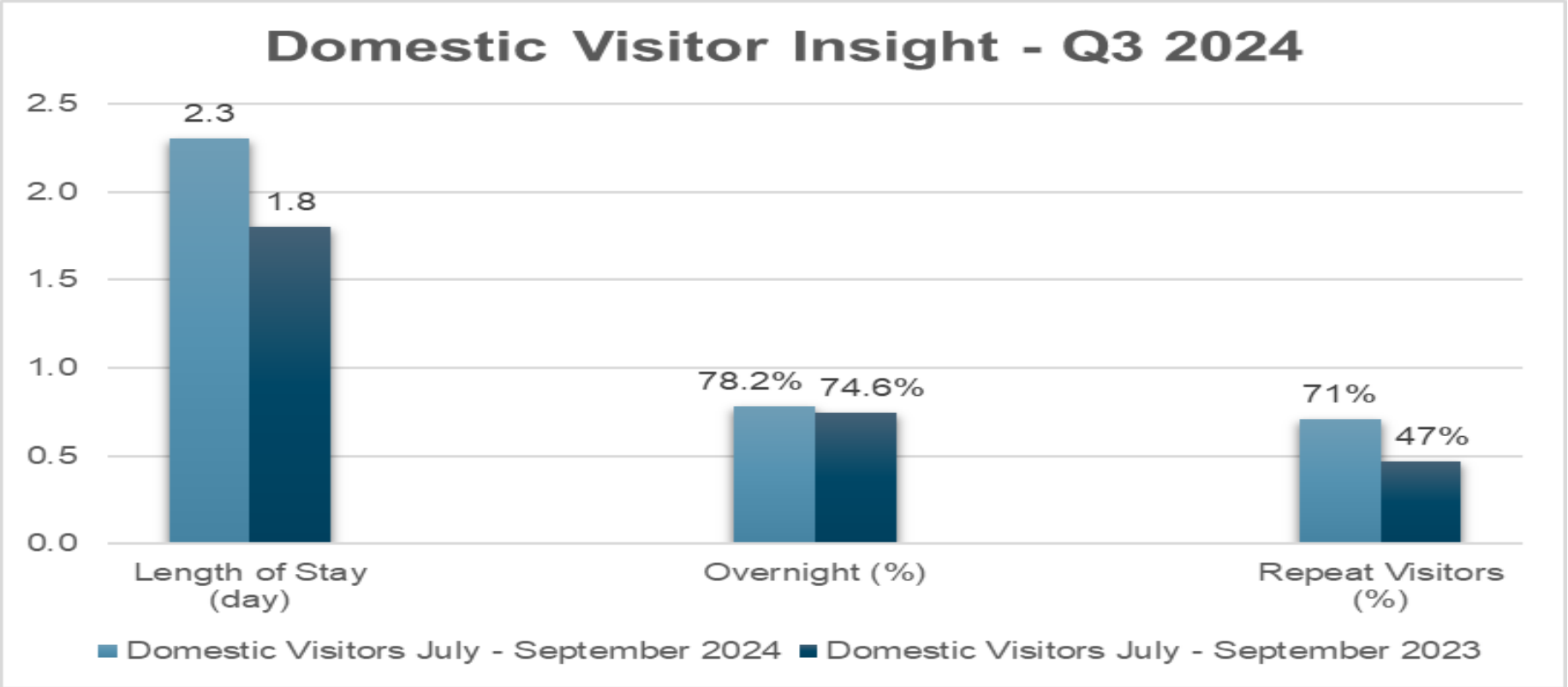


Office of Tourism 3rd Quarter Report Card



Domestic Visitor - Length of Stay & % for Overnight Visitors

Domestic Visitor Insight - Q3 2024

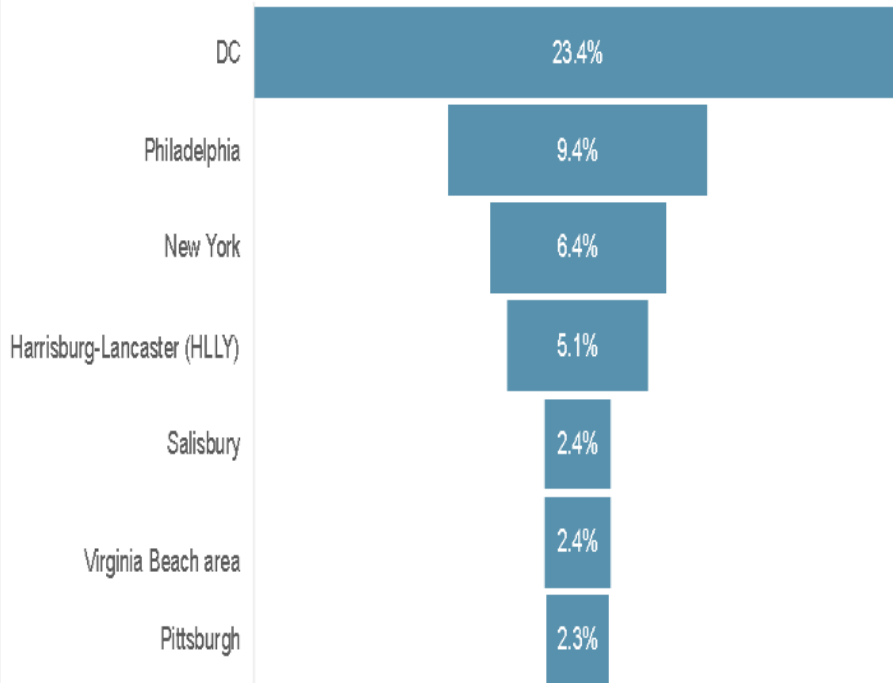


Sources Near, TE Q3 = July to September 2024

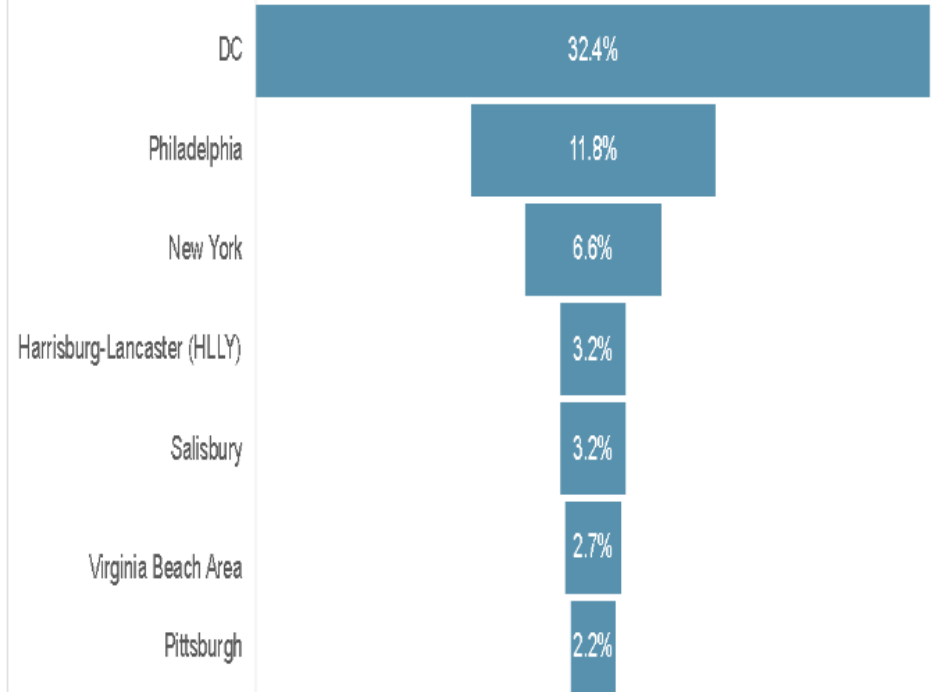


Domestic Visitor Top DMA - Q3 2024

Top DMA - Q3 2024

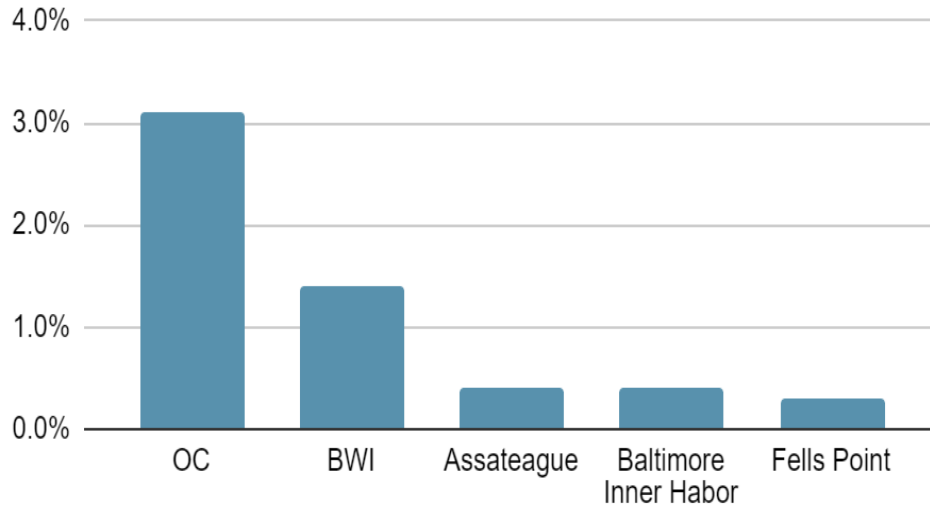


Top DMA - Q3 2023



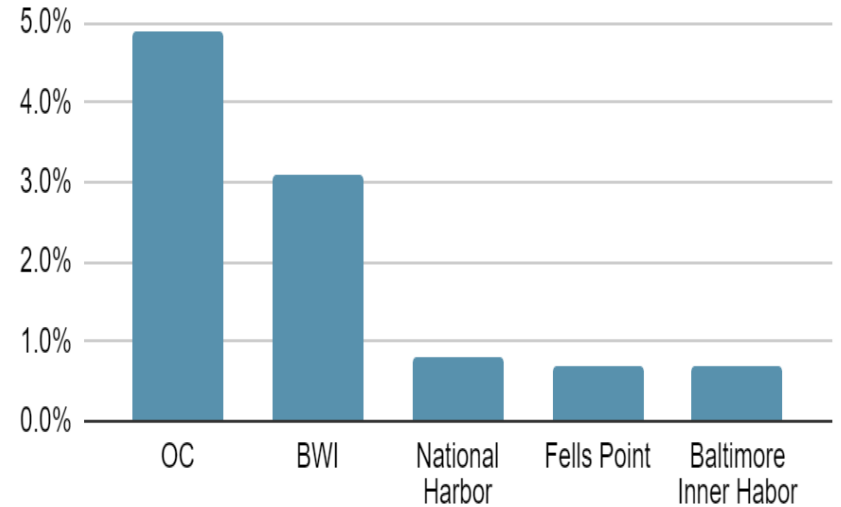
Domestic Visitor - Top Places visited in Q3 2024

Top Places Visited - Q3 2024



July - September 2024

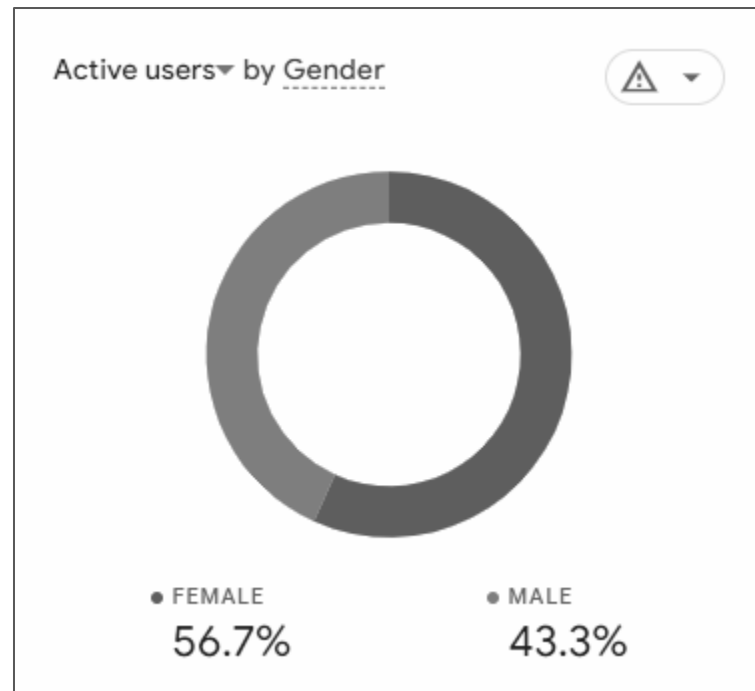
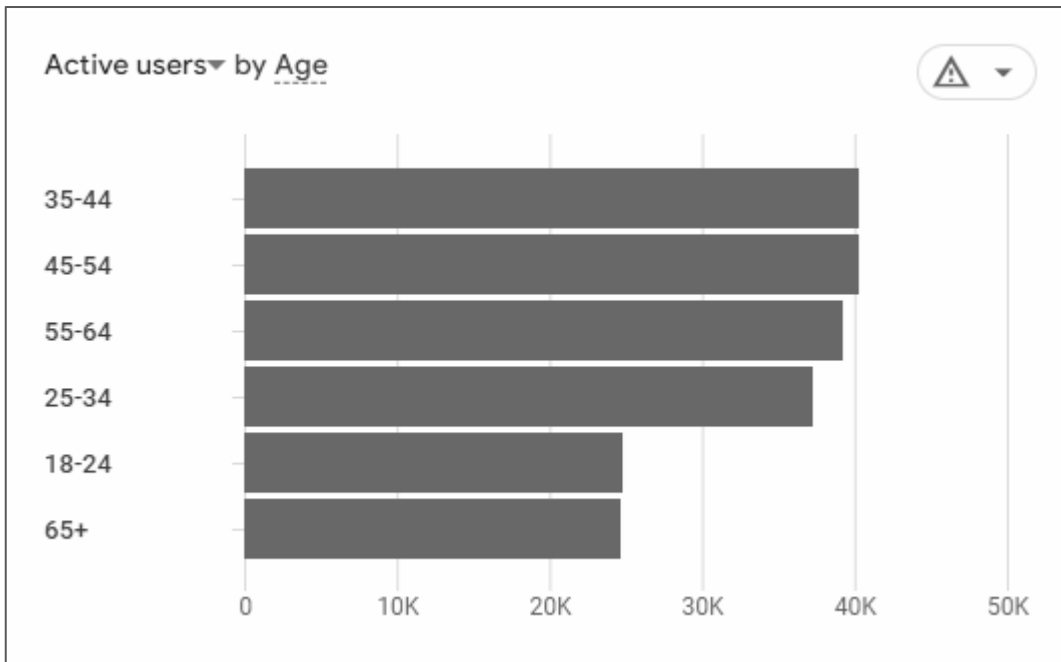
Top Places Visited - Q3 2023



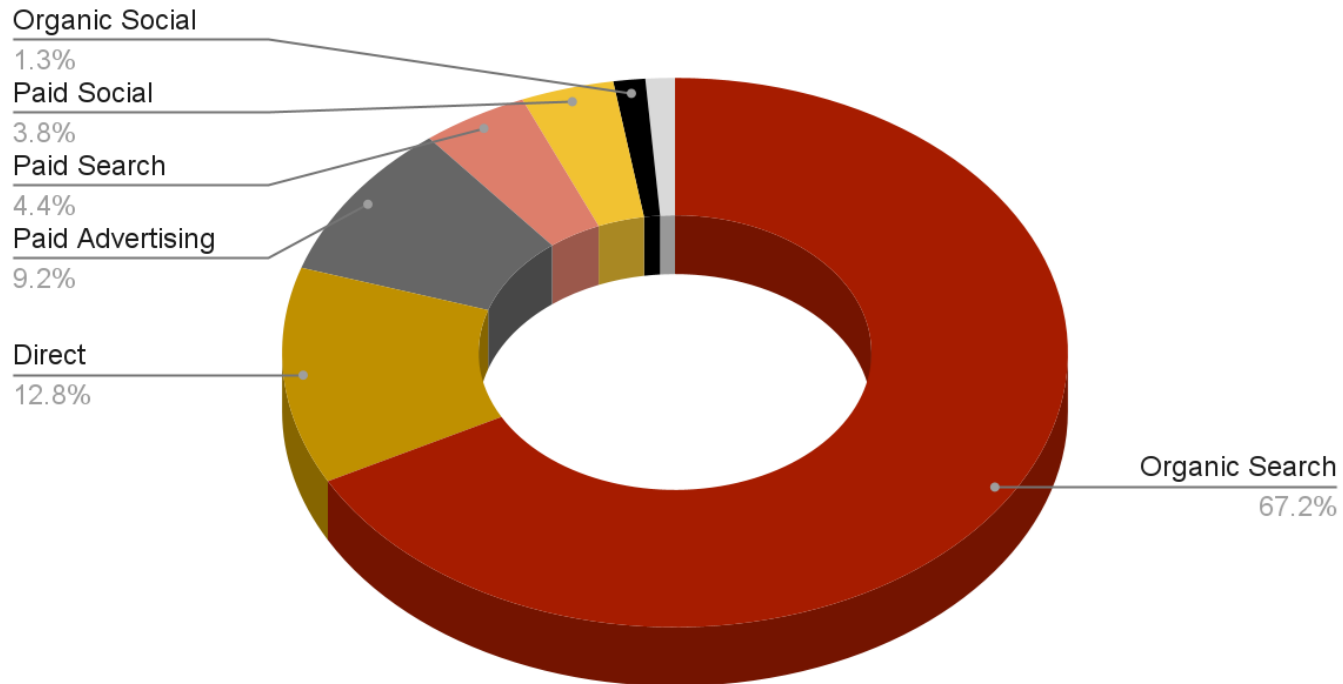
July - September 2023



Demographic Information



Where is the Traffic Coming From?



Great Chesapeake Bay Loop - Social Videos



Water Street Seafood

Havre de Grace



Great Chesapeake Bay Loop - Culinary

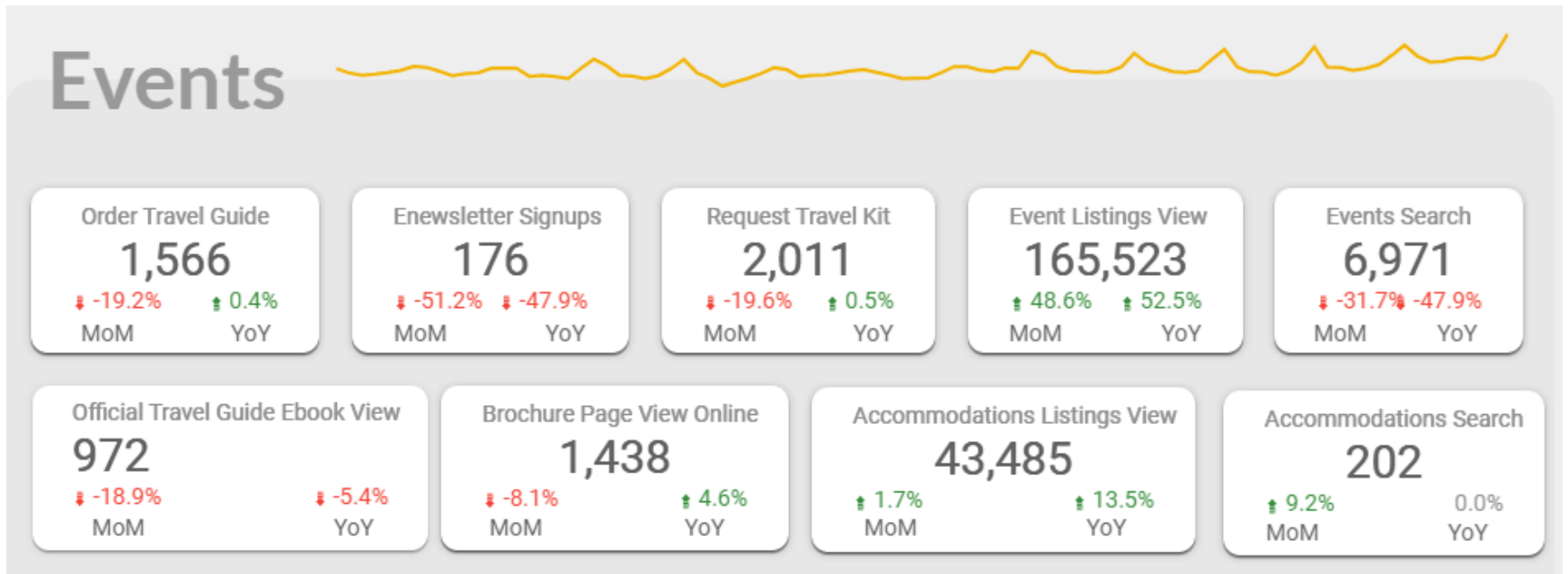


Bayside Inn Restaurant

Ewell



SEO Overview



★ Significant wins YoY are Accommodations Listings View and Event Listings View

★ Google Search page one keywords increased 36% YoY reaching 132,620



Top 20 Partner Referrals

| | |
|--|----------------|
| Total | 209,895 |
| Maryland State Fair | 12,271 |
| Soccer Champions Tour: AC Milan vs. FC Barcelona | 2,393 |
| July 4th Celebration & Fireworks at the Columbia Lakefront | 2,268 |
| Assateague Island National Seashore | 2,004 |
| Fells Point Oyster Fest | 1,860 |
| Mountain Coaster at Wisp Resort | 1,748 |
| Bethesda Blues and Jazz Supper Club | 1,607 |
| Rocky Gap State Park | 1,514 |
| Cascade Lake | 1,373 |
| Rocky Gap Casino Resort | 1,323 |

| | |
|--|-------|
| Assateague Adventure | 1,275 |
| 2024 Carroll County Farm Museum Fourth of July Celebration | 1,262 |
| PGN Crab House | 1,259 |
| Patapsco Valley State Park | 1,227 |
| Pine Ridge Golf Course | 1,222 |
| Water Park at Bohrer Park | 1,212 |
| Gunpowder Falls State Park: Hammerman Area | 1,184 |
| Chesapeake City Independence Day Fireworks | 1,177 |
| Das Best Oktoberfest | 1,128 |
| Inner Harbor | 1,110 |



QR Codes

| Page path and screen class | ↓ Views | Sessions | Engaged sessions | Average session duration | Engagement rate |
|---|----------------------|----------------------|----------------------|--------------------------|-----------------|
| Total | 556 100% of total | 259 100% of total | 151 100% of total | 3m 55s Avg 0% | 58.3% Avg 0% |
| 1 /history/civil-war | 170 | 157 | 87 | 1m 41s | 55.41% |
| 2 /scenic-byways | 26 | 20 | 14 | 1m 00s | 70% |
| 3 /article/civil-war-history | 24 | 21 | 19 | 3m 27s | 90.48% |
| 4 /unique-experiences/underground-railroad | 24 | 22 | 17 | 1m 00s | 77.27% |
| 5 /scenic-byways/harriet-tubman-underground-railroad | 14 | 8 | 7 | 9m 29s | 87.5% |
| 6 / | 13 | 8 | 6 | 36s | 75% |
| 7 /things-to-do/free-things-to-do | 13 | 5 | 4 | 3m 03s | 80% |
| 8 /driving-tours/mid-bay-central-maryland-crab-oyster-trail | 11 | 1 | 1 | 10m 03s | 100% |
| 9 /list/civil-war-sites-visit | 11 | 10 | 8 | 47s | 80% |
| 10 /scenic-byways/chesapeake-country | 10 | 4 | 4 | 7m 50s | 100% |



Marketing Updates

- Began incorporating Hispanic audience-targeted element into spring/summer campaign and into others going forward
- Completed new winter-themed assets; created and will deploy new winter-themed TV spots.

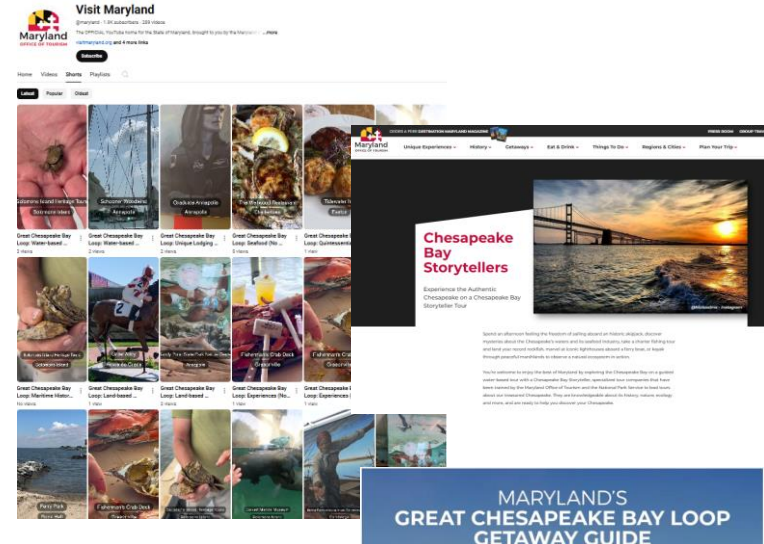


Marketing Expansion - Inclusive Travel



Leveraging Federal Funding Partnerships

- **National Park Service** Chesapeake Gateways Grant
 - All projects and closeout process are complete
 - \$204K in federal funds; \$201K in state funds
 - Outputs include:
 - Multi-form videos
 - Consumer Research Study
 - 20 new Storyteller Tour Guides from 14 Businesses
 - New GCBL Getaway Guide



On The Road - Meeting Customers

National Tour Association Travel Exchange

Huntsville, AL

- One-on-One appointments
- Maryland Sales Presentation
- Partnering with Dynamic Destinations to host Tour Operator breakfast
- Speaker Panelist on Partnering



On The Road - Meeting Customers

American Bus Association Marketplace

Philadelphia, PA

- One-on-One appointments (2 sets)
- Maryland Trade Show booth
- Marketplace Reception



On The Road - Meeting Customers

IPW

- Co-operative opportunity!
- June 14-18, 2025 in Chicago, IL
- Appointments with buyers from our primary international markets of Canada, United Kingdom, German, French markets, plus domestic inbound receptive operators



Take these Take Aways, Please!

- visitmaryland.org
- industry.visitmaryland.org
- Subscribe and READ *Insights*





THANK YOU

