



Fiscal Year 2026 Tourism Marketing and Development Plan

MARYLAND TOURISM DEVELOPMENT BOARD AND
MARYLAND DEPARTMENT OF COMMERCE OFFICE OF TOURISM DEVELOPMENT



Table of Contents

Preface Statements	2
From the Secretary of Commerce	3
From the Chair	4
Branding Statement	5
Brand Positioning	6
Situational Analysis	
Fiscal Year 2026 Marketing Plan	8
Competitive State Tourism Marketing Budgets	9
Richest Counties in the U.S.	10
Trends and Comparisons	11
Visitor Volume	12
Visitor Length of Stay	13
Visitor DMA of Origin	14
Visitor Profile	16
Travel Regions	21
Competitive Advantage	22
Economic Impact	23
Where Do Our Visitors Stay and How Do They Get Here?	24
What Do Our Visitors Do When They Come to Maryland?	25
Maryland Tourism Development Board	26
Functional Areas	27
Industry Events Calendar	30
Industry Checklist: Ways to Work With Us	31



Preface Statements

WHAT IS TOURISM?

Tourism is a visitor-spending economic ecosystem that delivers opportunity and quality of life for Marylanders.

WHAT IS A TOURISM VISITOR?

A tourism visitor travels from more than 50 miles away and/or spends the night in accommodations paying state and local taxes.

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 Tourism Development Board and the Maryland Office of Tourism help stimulate and drive Maryland's thriving tourism economy, with a primary goal of creating a great place for all Marylanders to live, work and enjoy.

WHAT IS THE STRATEGIC OBJECTIVE?

To invest Maryland Tourism Development Board and the Maryland Office of Tourism resources in programs and projects that increase the number of visitors taking leisure and/or business-related multi-night trips.



From the Secretary of Commerce

Dear Tourism Friends and Partners,

On behalf of the Maryland Department of Commerce, I'm proud to share this marketing plan prepared by the Maryland Office of Tourism, a critical part of the Commerce team.

Tourism is a major economic driver for our state: In 2024, visitors spent more than \$21.2 billion, which helped generate more than \$2.5 billion in state and local tax revenue and saved each Maryland household nearly \$1,051 in taxes.

Our team works hard to promote Maryland to visitors from around the globe, and the annual marketing plan aligns with the major goals of the Department of Commerce: sustain and increase economic impact

from tourism; sustain and improve jobs in the tourism industry; improve awareness and enhance the positive perception of Maryland; and leverage investment in Maryland's unique quality-of-life assets.

I join our Maryland Tourism Development Board Chair Ben Seidel in encouraging you to review this plan and help us achieve its goals for the state's tourism sector. By working together, with a unified message, we can make our tourism industry more robust, more equitable and more competitive.

Sincerely,



HARRY COKER, JR.
Secretary, Maryland Department
of Commerce



From the Chair

Dear Tourism Friends and Partners,

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

This Fiscal Year, we continue to see our visitation and visitor spending numbers follow an upward path. Some 194,000 employees in tourism-related jobs around the state earn more than \$10.5 billion in wages, making 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 \$9.183 million for FY 2026. 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, 18 Scenic Byways and MD250, celebrating the nation's upcoming landmark birthday.

We are proud of this board's continuing work with the Office of Tourism and are pleased to present the Fiscal Year 2026 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.

Sincerely,



BEN SEIDEL
Chair, Maryland Tourism
Development Board

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



Branding Statement

TO leisure travelers

WHO appreciate and seek out unique experiences

MARYLAND IS where you'll create happy memories that last a lifetime

“YOU'RE WELCOME” BRANDING

In 2023, the Maryland Tourism Development Board (MTDB), at the direction of the Governor's Office, and the Maryland Office of Tourism Development (MOTD) adopted a fresh marketing campaign and message titled, “YOU'RE WELCOME.” It extends a warm invitation to potential visitors while also ensuring that the beauty, culture, history and flavors of our great state remain front and center in each communication. The shift represents an exciting time for all marketers and partners who help promote the wide range of experiences offered in Maryland.



Brand Positioning

MARKETING GOALS

- Elevate the Maryland brand and increase positive perceptions of Maryland as a fun place to visit with lots to see and do.
- Increase brand awareness across target markets.
- Connect Maryland's variety of experiences to traditional tourism markets of hotels, restaurants and attractions.
- Increase multi-night stays and visitor spending.

DOMESTIC ADVERTISING | OVERALL OBJECTIVES AND KEY PERFORMANCE INDICATORS (KPIs)

Primary Goal: Increase tourism sales tax revenue via multi-night hotel stays.

KPIs:

- Growth of tourism hotel tax codes 111 and 901.
- Hotel bookings (as measured by Adara Impact, Expedia and Priceline/Booking.com).

Secondary Goal: Increase awareness of Maryland as a leisure travel destination; drive awareness and usage of deals/discounts on the web site.

KPIs:

- Impressions (high reach with optimal frequency).
- Click-through rate.
- Web site conversion activities.



Brand Positioning

CAMPAIGN TOUCHPOINTS

Broadcast TV, CTV/OTT/streaming, out-of-home advertising, digital display banners, retargeting, print advertising, native advertising, radio (broadcast and online), online video, paid search (SEM), social media and content creators.

TARGET MARKETS

Baltimore, D.C./NoVa, Philadelphia, Harrisburg, Pittsburgh, NYC Metro and Cleveland.

PRIMARY TARGET AUDIENCES

Adults ages 25-64, male and female, household income range \$75K-\$150K, families and couples.

ADDITIONAL TARGET AUDIENCES

Meeting Planners. MOTD will work with “Meet in Maryland 2.0,” a collaborative effort with six of the state’s Destination Marketing Organizations (DMOs) to promote Maryland as a premier destination for meetings and events.



Situational Analysis

Fiscal Year 2026 Marketing Plan

Each July 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” branding.

The Office of Tourism Development continues 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 and based upon knowledge gleaned over the last year.

As we look ahead, the Maryland travel industry faces substantial headwinds: a \$3.1 million reduction in marketing budget and a statewide hiring freeze, as well as national political uncertainty, geopolitical volatility and economic instability. To the extent that we can, we have factored these trends into the development of this marketing plan.

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

COMPETITORS PROSPECTING IN OUR REGION 2024

ORGANIZATION	MARKETING BUDGET 2024
Visit California	\$72.4 million
Visit Florida	\$80 million
Destination DC	\$37 million
New York State Division of Tourism	\$58.5 million
West Virginia Department of Tourism	\$23 million
Pennsylvania Tourism Office	\$19 million
MTDB	\$11.06 million
New Jersey Division of Travel & Tourism	\$17.4 million
Virginia Tourism Authority	\$32 million

Nationally, the average state tourism marketing budget is \$19.8 million.

Within this competitive marketplace, many other destinations are vying for the same 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 markets.



Situational Analysis • Richest Counties in the U.S.

Maryland’s prime location on the mid-Atlantic corridor puts our destination within reach of a desirable target demographic. Four 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, New York.



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

TOP 10 RICHEST COUNTIES IN THE U.S.			
RANK	COUNTY	STATE	MEDIAN HOUSEHOLD INCOME
1	Loudoun County	Virginia	\$178,707
2	Santa Clara County	California	\$159,674
3	San Mateo County	California	\$156,000
4	Falls Church	Virginia	\$154,734
5	Fairfax County	Virginia	\$150,113
6	Howard County	Maryland	\$146,982
7	Douglas County	Colorado	\$145,737
8	Nassau County	New York	\$143,408
9	Los Alamos County	New Mexico	\$143,188
10	Marin County	California	\$142,785

Source: (2025, January 1). *The 15 Richest Counties in the U.S.*, U.S. News & World Report.
www.usnews.com/news/healthiest-communities/slideshows/richest-counties-in-america



Situational Analysis • Trends and Comparisons

MARYLAND OUTPACED ITS COMPETITORS' REGIONAL VISITOR VOLUME 2024

At the person-stays level, Maryland's visitation is 56.77 million. We saw a 1.1 percent increase in the state compared to 2023, and the visitation volume is double that of DC and WV, and triple that of DE. Business travel had a 1.2 percent increase and leisure travel had a 1.1 percent increase. Overall, Maryland's travel and tourism has had steady growth.

COMPETITORS' REGIONAL VISITOR VOLUME 2024 (IN MILLIONS)							
	U.S.	MD	D.C.	DE	PA	VA	WV
PERSON-STAYS	YE 2024	YE 2024	YE 2024	YE 2024	YE 2024	YE 2024	YE 2024
TOTAL	3,984.06	56.77	25.03	13.48	152.68	92.89	25.86
BUSINESS	710.68	10.20	7.47	2.22	21.71	19.98	3.82
LEISURE	3,273.38	46.57	17.57	11.26	130.97	72.91	22.04
DAY	2,193.81	35.76	7.91	7.54	89.72	48.20	17.19
OVERNIGHT	1,790.25	21.01	17.12	5.95	62.96	44.69	8.67

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

PERCENT CHANGE – COMPETITORS' REGIONAL VISITOR VOLUME 2024							
	U.S.	MD	D.C.	DE	PA	VA	WV
TOTAL	0.5%	1.1%	4.3%	-2.0%	2.2%	2.1%	0.1%
BUSINESS	1.4%	1.2%	6.8%	-0.4%	4.3%	6.7%	1.1%
LEISURE	0.3%	1.1%	3.2%	-2.3%	1.8%	0.9%	-0.1%
DAY	1.9%	2.2%	6.1%	-0.2%	4.7%	6.0%	1.8%
OVERNIGHT	-1.3%	-0.7%	3.4%	-4.2%	-1.2%	-1.8%	-3.1%

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 Volume

In 2024, Maryland welcomed 45.1 million domestic travelers, as measured by person-trips, according to a national survey of U.S. travelers conducted by D.K. Shifflet & Associates, a leading tourism research firm under MMGY Global. These visitors generated \$15.7 billion in direct spending, representing a 5.5 percent increase over 2023.

Leisure travel accounted for the majority for both volume and spending. Of the total direct spending, \$12.1 billion (77 percent) came from leisure travelers, while \$3.58 billion (23 percent) was attributed to business travel. In terms of visitor volume, leisure travelers totaled 37 million, making up 82 percent of all domestic visits. Business travelers take an 18 percent share, or 8.1 million visitors.

U.S. AND MARYLAND VISITOR VOLUME COMPARISON (PERSON-TRIPS IN MILLIONS)						
	MARYLAND			U.S.		
	2022	2023	2024	2022	2023	2024
TOTAL	42.94	44.45	45.07	3,159.25	3,263.90	3,284.99
BUSINESS	7.70	7.98	8.11	691.28	731.72	775.55
LEISURE	35.24	36.47	36.96	2,467.97	2,532.17	2,509.44
DAY	25.94	26.82	27.46	1,849.22	1,964.62	2,000.69
OVERNIGHT	17.00	17.63	17.61	1,310.03	1,299.27	1,284.30

DIRECT
SPENDING IS UP
5.5 PERCENT

VISITATION
IS UP 3.3
PERCENT

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

SHARES OF VISITOR VOLUME ESTIMATES (PERSON-TRIPS IN MILLIONS) – PERCENT OF TRAVELERS						
	MARYLAND			U.S.		
	2022	2023	2024	2022	2023	2024
TOTAL						
BUSINESS	17.9%	18.0%	18.0%	21.9%	22.4%	23.6%
LEISURE	82.1%	82.0%	82.0%	78.1%	77.6%	76.4%
DAY	60.4%	60.3%	60.9%	58.5%	60.2%	60.9%
OVERNIGHT	39.6%	39.7%	39.1%	41.5%	39.8%	39.1%

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System, based on person-trips
*Person-Stays Weight: The person-stays weight counts the total number of people on a stay, regardless of the length of their stay at a destination.



Situational Analysis • Visitor Length of Stay

ENCOURAGING MULTI-NIGHT STAYS CONTINUES TO BE A KEY FOCUS OF MARYLAND'S MARKETING STRATEGY

In 2024, overnight travel accounted for 39 percent of total visitation, for a total of 17.6 million visitors. While total domestic visitation grew by 1.4 percent compared to 2023 (44.45 million), the overnight segment experienced a slight decline of 0.2 percent. In contrast, day travel increased by 2.4 percent, leisure travel rose by 1.3 percent and business travel grew by 1.7 percent.

At the national level, total U.S. domestic visitation increased by less than 1 percent, reaching 3.28 billion. However, overnight travel declined by 1.2 percent in 2024, highlighting a broader trend. Maryland aims to counter this trend through strategic marketing initiatives focused on encouraging extended stays.





Situational Analysis • Visitor DMA of Origin



WHERE DO OUR VISITORS COME FROM? TOP 5 DMAS OF ORIGIN

- A designated market area 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. MOTD is interested in the visitor’s DMA of origin to target marketing and advertising efforts.
- The majority of the day and overnight visitors come from the Washington, D.C. (Hagerstown, MD) DMA.
- The Philadelphia, New York, Virginia, Harrisburg-Lancaster and Pennsylvania DMAs are key feeder markets for overnight trips (which involve a longer stay and increased spending).

TOP 5 DMA* VISITOR VOLUME 2024

DMA VISITOR VOLUME					
	2024			2023	
	% OF VISITORS TO MD	TOTAL VISITOR NUMBER (MILLIONS)		% OF VISITORS TO MD	TOTAL VISITOR NUMBER (MILLIONS)
Washington, D.C. (Hagerstown, MD)	33%	18.77	Washington, D.C. (Hagerstown, MD)	29.9%	16.78
Baltimore, MD	21%	11.90	Baltimore, MD	23.8%	13.34
Philadelphia, PA	9%	5.11	Philadelphia, PA	10%	5.61
New York, NY	6%	3.27	Harrisburg-Lancaster-Lebanon-York, PA	6.4%	3.57
Harrisburg-Lancaster-Lebanon-York, PA	5%	2.66	New York, NY	5.9%	3.32

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

*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 DMA of Origin



2024 VS. 2023 DMA OF ORIGIN			
OVERNIGHT – DMA OF ORIGIN			
2024		2023	
ORIGIN DMA	OVERNIGHT	ORIGIN DMA	OVERNIGHT
Washington, D.C. (Hagerstown, MD)	18%	Washington, D.C.	15%
Baltimore, MD	14%	Baltimore, MD	13%
New York, NY	10%	Philadelphia, PA	11%
Philadelphia, PA	10%	New York, NY	10%
Harrisburg-Lancaster-Lebanon-York, PA	4%	Harrisburg-Lancaster-Lebanon-York, PA	6%
Wilkes Barre-Scranton, PA	3%	Norfolk-Portsmouth-Newport News, VA	4%
Richmond-Petersburg, VA	2%	Dallas-Fort Worth, TX	3%
Boston, MA (Manchester, NH)	2%	Los Angeles, CA	3%
Florence-Myrtle Beach, SC	2%	Richmond-Petersburg, VA	2%
Atlanta, GA	2%	Pittsburgh, PA	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 U.S. that is used to define television and radio markets.



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



Situational Analysis • Visitor Profile

MARYLAND/OCEAN CITY/BALTIMORE SHARE OF VISITS					
Based on Person-Stays Weight for 2024 (in millions): 56.77 million — Total Domestic Visitation Volume					
2024		MARYLAND		BALTIMORE	OCEAN CITY
Estimated Share of Visits				32.6%	8.2%
Estimated Person-Stays (Millions)		56.77		18.53	4.66
Average Travel Party Size		1.81		1.71	2.39
Average Length of Stay		1.0		1.1	1.92
Average Spending per Person per Day		\$181.30		\$225.68	\$197.49
Spending in MD per Travel Party		\$324.25		\$423.01	\$905.05
TOP 3 DMAS OF ORIGIN					
MARYLAND		BALTIMORE		OCEAN CITY	
Washington, D.C. (Hagerstown, MD)	33.1%	Washington, D.C. (Hagerstown, MD)	29.7%	Baltimore, MD	31.5%
Baltimore, MD	23.0%	Baltimore, MD	19.0%	Washington, D.C. (Hagerstown, MD)	13.0%
Philadelphia, PA	9.0%	Philadelphia, PA	9.3%	Philadelphia, PA	12.4%

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

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



Situational Analysis • Visitor Profile

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 in recent years. Maryland’s media buys are targeted at adults 25-64, but with a strong skew toward households with an income (HHI) of \$75,000+, well-educated travelers and those who work in 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 VS. OVERNIGHTS – INDIVIDUAL		
	DAY	OVERNIGHT
GENDER		
MALE	53%	49%
FEMALE	47%	51%
AGE		
18-34	28%	16%
35-49	27%	33%
50-64	25%	28%
65+	21%	23%

In 2024, Maryland saw notable trends in visitor demographics across both day and overnight travel:

- **Gender Distribution:** Males made up the majority of day-trip visitors, accounting for 53 percent compared to 47 percent female. For overnight trips, the split slightly favored females, who represented 51 percent of those travelers.
- **Age Groups:** Visitors age 18-34 comprised the largest share of day travelers at 28 percent, although they took a smaller portion of overnight trips. The 35-49 age group represented the largest share of overnight visitors at 33 percent and were the second largest group for day trips. Most of the overnight trips are made by ages 35-64.
- **Combined Age Segments:** Overall, more than 55 percent of day trips and nearly half (49 percent) of overnight trips were made by visitors between the ages of 18 and 49.



Situational Analysis • Visitor Profile

DAY TRIP VS. OVERNIGHTS – INCOME		
INCOME	DAY	OVERNIGHT
Under \$50K	27%	14%
\$50K-\$74.9K	12%	13%
\$75K-\$99.9K	11%	11%
\$100K-\$149.9K	17%	21%
\$150K+	32%	41%

- Visitors to Maryland tend to be affluent; over half reported a household income of \$100,000 or more and 36 percent earned more than \$150,000.

DAY TRIP VS. OVERNIGHTS – MARITAL STATUS		
MARITAL STATUS	DAY	OVERNIGHT
Married/With Partner	54%	68%
Never Married	35%	19%
Divorced/Widowed	11%	13%

- Married individuals or those with partners formed the majority of both day and overnight visitors — 54 percent of day trips and 68 percent of overnight trips.

DAY TRIP VS. OVERNIGHTS – EDUCATION		
EDUCATIONAL ATTAINMENT	DAY	OVERNIGHT
High School Graduate	34%	23%
Some College	17%	25%
College Graduate	27%	25%
Post-Graduate	19%	27%

- Visitors to Maryland are highly educated, with 49 percent of both day and overnight visitors holding at least a college degree. In total, 70 percent have attended an institution of higher education.

DAY TRIP VS. OVERNIGHTS – EMPLOYMENT TYPE		
EMPLOYMENT	DAY	OVERNIGHT
Full Time/Self-Employed	63%	68%
Not Employed/Retired	32%	30%

- A majority of visitors to Maryland are actively engaged in the workforce, with 65 percent of day and overnight visitors employed full time or self-employed.



Situational Analysis • Visitor Profile

DAY TRIP VS. OVERNIGHTS – FAMILIES		
HOUSEHOLD SIZE	DAY	OVERNIGHT
1 Member	15%	11%
2 Members	30%	37%
3 Members	18%	16%
4 Members	20%	21%
5+ Members	16%	15%
Children Present in the Travel Party	22%	21%

- In 2024, most visitors to Maryland traveled in small groups or as couples:
- **Travel Party Size:** Couples or two-person parties made up a significant portion of trips, accounting for 30 percent of day trips and 37 percent of overnight trips.
 - **Household Size:** The majority of trips — 68 percent of both day and overnight travel — were taken by households with two to four members.
 - **Families with Children:** Approximately 22 percent of visiting households included children, indicating that family travel represents a notable but smaller segment of overall visitation.

TIME FRAME OF TRAVEL		
	DAY	OVERNIGHT
January-March	20%	25%
April-June	28%	29%
July-September	20%	27%
October-December	32%	19%

Travel patterns to Maryland varied by season in 2024. Most day trips took place during the summer and holiday seasons, accounting for 60 percent of visits. Overnight trips were most common from April to September, with 56 percent occurring during this period. In contrast, the months of October through December saw more day trips at 32 percent, but the fewest overnight trips, making up just 19 percent.



Situational Analysis • Visitor Profile



DAY TRIP VS. OVERNIGHTS – STATE OF ORIGIN 2024						
TOP 8		DAY TRIP		TOP 10		OVERNIGHT
Maryland	53%	Maryland		23%		
Pennsylvania	14%	Pennsylvania		15%		
Virginia	13%	Virginia		10%		
Delaware	3%	New Jersey		8%		
New York	3%	New York		7%		
New Jersey	3%	Florida		4%		
District of Columbia	2%	North Carolina		4%		
North Carolina	1%	District of Columbia		3%		
		Delaware		3%		
		South Carolina	2%			

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



Situational Analysis • Travel Regions

VISITATION TO MARYLAND'S FIVE TRAVEL REGIONS:

For purposes of communication with our customers, Maryland is broken down into five regions, which are outlined below.

SHARE OF MARYLAND VISITATION							
MARYLAND DESTINATION REGIONS		2019	2020	2021	2022	2023	2024
CENTRAL REGION	Anne Arundel, Baltimore City, Baltimore, Carroll, Harford and Howard counties	55.2%	30.3%	59.1%	59.0%	57.5%	58.2%
CAPITAL REGION	Frederick, Montgomery and Prince George's counties	17.5%	20.9%	16.0%	18.0%	18.1%	15.7%
EASTERN SHORE	Caroline, Cecil, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester counties	18.8%	37.9%	18.5%	12.5%	16.6%	16.7%
WESTERN MARYLAND	Allegany, Garrett and Washington counties	5.1%	8.2%	3.3%	7.2%	4.7%	4.7%
SOUTHERN REGION	Calvert, Charles and St. Mary's counties	3.4%	2.7%	3.1%	3.3%	3.1%	4.1%

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

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



Situational Analysis • Competitive Advantage

WHAT IS MARYLAND'S COMPETITIVE ADVANTAGE: PRODUCT ANALYSIS AND ACCESS

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 to Maryland 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.

Maryland's prime location on the mid-Atlantic corridor puts our destination within reach of a desirable target demographic. Four 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, New York.



Situational Analysis • Economic Impact

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.

ECONOMIC IMPACT OF TOURISM IN MARYLAND 2024 – KEY FINDINGS						
Tourism in Maryland	2019	2020	2021	2022	2023	2024
Total Visitors (Domestic and international)	42.1 million	24.7 million	35.2 million	43.5 million	45.1 million	45.8 million
Visitor Spending	\$18.6 billion	\$11.6 billion	\$16.4 billion	\$19.4 billion	\$20.5 billion	\$21.2 billion
Visitor Spending Growth	3.0%	-37.6%	42.0%	18.4%	5.7%	3.2%
Total Economic Impact	\$30.3 billion	\$20.9 billion	\$26.4 billion	\$30.3 billion	\$31.4 billion	\$32.3 billion
Fiscal Contributions (State and local taxes)	\$2.6 billion	\$1.7 billion	\$2.1 billion	\$2.3 billion	\$2.4 billion	\$2.5 billion
Tax Savings (For each household)	\$1,175	\$775	\$923	\$999	\$1,027	\$1,051
Tourism Supported Jobs (Direct and indirect)	226,427 jobs	166,000 jobs	173,700 jobs	187,296 jobs	190,660 jobs	193,845 jobs
Tourism Industry Employment (Direct jobs)	149,991 jobs	104,328 jobs	112,879 jobs	123,617 jobs	126,977 jobs	130,444 jobs
Direct Income Generated by Tourism	\$6.6 billion	\$4.9 billion	\$5.3 billion	\$6.0 billion	\$6.4 billion	\$6.6 billion
Total Income Generated by Tourism	\$10.6 billion	\$8.1 billion	\$8.7 billion	\$9.7 billion	\$10.1 billion	\$10.5 billion
Private Sector Employer in Maryland Ranking	11th	12th	12th	10th	11th	11th



Situational Analysis

Where Do Our Visitors Stay and How Do They Get Here?

ACCOMMODATIONS AND MODE OF TRANSPORTATION FOR ALL MARYLAND OVERNIGHT TRAVELERS 2024			
ACCOMMODATIONS	OVERNIGHT	TYPE OF TRANSPORTATION TO/WITHIN DESTINATION	OVERNIGHT
Standard Hotel	46%	Personal Vehicle	67%
Friend/Relative's Home/Apt/Condo (2012+)	22%	Rental Vehicle	10%
Suite & Resort Hotel	12%	Ride-Sharing Service (Uber, Lyft, etc.)	5%
Condo/Home/Apartment (Rental) (2012+)	10%	Company/Work Vehicle (Unaided 2012+)	4%
Other Paid Accommodation (B&B, Campsite, Cabin/Lodge, Timeshare, Rented Home, Apt, Condo)	7%	Taxi/Limo	3%
My 2nd Home/Apartment/Condo (2015+)	3%	Other Transportation	11%

2024 Accommodations and Transportation

- Overnight travelers spend more dollars on paid accommodations and 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 automobiles, 10 percent of visitors use rental cars, 5 percent employ ride-sharing services (Uber, Lyft, etc.) and 5 percent travel by air.



Situational Analysis

What Do Our Visitors Do When They Come to Maryland?

TOP 15 ACTIVITIES OF LEISURE TRAVELERS

- The top five activities for both day and overnight travelers are: business/work, visiting friends and relatives, beach/waterfront, birthday and anniversary celebrations and amateur youth sports.
- Other activities such as: holiday celebrations, live music, festivals, tours/sightseeing, family events, historical sites and professional sports events are among the top 15 activities.

2024 VS. 2023 TOP 15 ACTIVITIES FOR TRAVELERS			
2024	OVERNIGHT	2023	OVERNIGHT
Business/Work	15.7%	Business/Work	17.3%
Beach/Waterfront	10.8%	Visit Friends/Relatives (General visit)	14.3%
Visit Friends/Relatives (General visit)	10.6%	Beach/Waterfront	11.3%
Birthday Celebration	9.8%	Birthday Celebration	4.1%
Amateur Youth Sports (Attend)	3.7%	Anniversary Celebration	3.3%
Live Music (Festivals, concerts, clubs, etc.)	2.4%	Other Personal Celebration (Birth, bachelor/bachelorette, engagement, showers, etc.)	2.4%
Wedding	2.3%	Holiday Celebration (Thanksgiving, 4th of July, etc.)	2.1%
Shopping	2.2%	Wedding	2.1%
Holiday Celebration (Thanksgiving, 4th of July, etc.)	2.1%	Festivals/Fairs (State, craft, etc.)	1.8%
Touring/Sightseeing	2.0%	Shopping	1.7%
Funeral/Memorial	2.0%	Boating/Sailing	1.7%
Reunion/Graduation	2.0%	Historic Sites	1.7%
Spa/Wellness	1.7%	Professional Sports Event	1.7%
Professional Sports Event	1.7%	Medical/Health/Doctor Visit	1.6%
Historic Sites	1.6%	Touring/Sightseeing	1.5%

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.



Maryland Tourism Development Board

The work of the MOTD is guided and supported by hospitality-industry leadership under the 14 gubernatorially appointed board of executives representing lodging, retail, transportation, food service and attractions, five members appointed by the Speaker of the House and five members appointed by the President of the Senate. By General Assembly authority, the board has broad policy powers to guide the direction of activities necessary to develop and market the state as a destination. MOTD's director serves as the board's executive director, with MOTD staff providing support to the board and its named committees. For a list of board members and more information, visit Industry.VisitMaryland.org/maryland-tourism-development-board.

Big Initiatives: Develop a five-year strategic plan that provides a clear direction for MTDB, MOTD and the tourism industry, adapts to change and improves the state's competitive position. Enhance MTDB governance through the implementation of its four named committees: marketing, legislative/education, strategic planning and nominations.

Multi-Night Stays: Align MTDB budget to maximize investments into strategies that increase the number of visitors staying more than one night in accommodations paying state and local accommodations taxes.





Functional Areas

ADVERTISING AND CONTENT

The goal of the Advertising and Content unit is to raise consumer awareness of and interest in Maryland as a travel destination. MOTD 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. Regular products include the [VisitMaryland.org](https://www.visitmaryland.org) web site and consumer and industry e-newsletters. We develop advertising and content that support customer experiences, promote our top differentiators and highlight Maryland as a must-see destination.

Big Initiatives: Maryland Scenic Byways new photography, web content and guidebook; MD250 web content and printed piece; Sail250 marketing; Realignment of SEM/SEO terms and strategy; Continuation of DMO co-op program; Redevelopment of our tourism database; New publications for FY26 include: *Destination Maryland* magazine 2026, a new Maryland's Underground Railroad Network to Freedom guide and an updated Frederick Douglass Driving Tour guide.

Multi-Night Stays: Implementation of a new AI trip-planner function on [VisitMaryland.org](https://www.visitmaryland.org) as a new way to connect more directly with the consumer to customize itineraries and extend multi-night travel in Maryland.

STRATEGIC PARTNERSHIPS

Strategic Partnerships leads and/or represents the MOTD on project teams and Commissions that focus directly on statewide, tourism-related issues and initiatives. Areas of focus address working collectively to increase the amount of multi-night stays throughout the state, addressing stakeholder desires and concerns, and responding to trends and/or legislation impacting the tourism industry. Partners include Maryland Sister States Program, national and global agencies, corporations, non-profits, tourism industry associations and tourism business owners.

Responsibilities include creating fully-integrated strategic marketing and communications campaigns, showcasing specific tourism areas of interest directly to consumers, managing projects, producing media and events, and making presentations to tourism industry stakeholders.

Big Initiatives: Serve on the Maryland 250 Commission; Promote International Underground Railroad Month; Lead the 2026 Maryland Horse Month marketing team; Represent MOTD on the Maryland Horse Park System branding initiative; Serve on Maryland's Fort to 400 Commission; Create partnerships with media companies and private sector partners to promote Maryland's Scenic Byways to special interest groups of travelers including women, golfers, off-road enthusiasts, cyclists and motorists.

Multi-Night Stays: In concert with partners, Strategic Partnerships creates unique tourism experiences and opportunities that are long in duration and intrinsically require multi-night stays.



Functional Areas

PUBLIC RELATIONS AND SOCIAL MEDIA

The Public Relations and Social Media Team advances statewide and regional efforts by working with journalists, 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 Maryland. Through media relations, consumer social media channels and management of digital asset inquiries, the efforts focus on strategies and tactics that provide compelling storytelling opportunities to encourage and inspire visitors to choose Maryland as their travel destination.

Big Initiatives: Continue to support the Marketing Maryland Scenic Byways project. Oversee and manage partnerships with content creators to produce digital content. Manage video production and curation of new digital assets. Lead media relations strategy to provide firsthand storytelling experience highlighting Maryland's unique destinations, visitor experiences, dining and offerings.

Multi-Night Stays: Secure third-party editorial and online conversations positioning Maryland as a premier multi-night travel destination. Lead strategy for marketing and communication efforts in Canada. Support the Maryland International Marketing Partnership through pitching efforts, familiarization tours and public relations inquiries. Collect, create and curate compelling editorial content for communications outlets and journalists. Develop social media conversations and promotions for the public utilizing various social media channels, user-generated assets and trends.

TOURISM DEVELOPMENT

The Development Team advances statewide and regional efforts through research, product development, industry relations, technical support, inquiry fulfillment and financial assistance. Tourism development efforts focus on strategies and tactics that provide competitive advantage in the marketplace. Outputs increase revenue and create jobs by developing sustainable infrastructure and culturally sensitive assets that enhance the visitor experience and improve the quality of life for all Marylanders.

Big Initiatives: Continue to implement the Marketing Maryland Scenic Byways project. Staff the Advisory Commission on Maryland Alcohol Manufacturing and Promotion. Administer financial-assistance investments, including the DMO Marketing Grant Program, Maryland Alcohol Manufacturing Promotion Fund Grant Program, and Maryland Vineyard and Winery Economic Development Grant Program. Manage the Maryland Tourism Industry Database of Businesses, Events and Deals/Discounts.

Multi-Night Stays: Manage the Maryland International Marketing and Meet in Maryland Partnerships. Provide bulk- and consumer-fulfillment services in response to sales, marketing and advertising inquiries. Develop online and print content that showcase differentiating stories and multi-night experiences. Provide research and analytics that evaluate and guide performance and return on investment.



Functional Areas

TRADE AND CONSUMER SALES

The objective of the Travel Trade and Consumer Sales Teams is to generate revenue through business-to-business and business-to-consumer activations. Travel trade sales activities focus on selling packaged travel products to tour operators or wholesalers who bundle transportation, accommodations and experiences for a structured and cost-effective group experience. Consumer sales activities involve direct engagement with customers at the eight MOTD-managed Maryland Welcome Centers, Maryland Call Center and Visit Maryland online information box.

TRAVEL TRADE

Big Initiatives: Organize participation in trade shows and marketplaces that support the selling of Maryland travel products to tour operators and receptive tour-operator clients, highlighting those upcoming initiatives to generate multi-night stays.

Multi-Night Stays: Work with the Maryland International Marketing Partnership to increase awareness of Maryland as a destination of choice for the international travel trade through participation in targeted U.S.-based international travel marketplaces, familiarization (FAM) tours and other promotional activities. Continue to highlight and promote multi-night tour itineraries to tour operators, receptive operators and group leaders.

CONSUMER SALES

Big Initiatives: Increase customer awareness of Maryland as a premier travel destination through the conveyance of product knowledge and exemplary customer service. Research interactive technology options to better inform customers and enhance sales efforts. Enhance the customer experience at the I-70 East and West Welcome Centers through the installation of new exterior exhibits. Enhance the customer experience at the Sideling Hill Rest Area and Welcome Center (SHRA) through the development of the SHRA Walking Trail.

Multi-Night Stays: Promote businesses, products and experiences to increase in-state customer length of stay and expenditures. Outfit each welcome center with regional and/or thematic displays. Maintain five-day-per-week operations at all centers.



INDUSTRY EVENTS CALENDAR

JULY 2025		
Destination International Annual Convention	9-11	Chicago, IL
Mason-Dixon Outdoor Writers Annual Conference	17-20	Hagerstown, MD
AUGUST 2025		
International Motorcoach Group's Strategic Alliance Meeting	5-8	Richmond, VA
Mid-Atlantic Tourism Public Relations Alliance Media Marketplace	12-14	Reading, PA
Virginia Motorcoach Association (with NCMA)	12-15	Winston-Salem, NC
Maryland Tourism Coalition-Summer Soiree	13	Ocean City, MD
Maryland Association of Counties Summer Conference	13-16	Ocean City, MD
National Council of State Tourism Directors (NCSTD)	17-19	Phoenix, AZ
Educational Seminars for Tourism Officers (ESTO) Conference	17-19	Phoenix, AZ
Outdoor Writers Association of America Conference	19-21	Chattanooga, TN
Student Youth Travel Association Marketplace	22-26	Savannah, GA
SEPTEMBER 2025		
Greater Northeast Motorcoach Association Marketplace	24-25	Atlantic City, NJ
Maryland Motorcoach Association Group Leader Marketplace	29-30	Gettysburg, PA
OCTOBER 2025		
Dynamic Destinations Sales Mission	TBA	TBA
Public Relations Society of America International's ICON 2025	28-30	Washington, D.C.

NOVEMBER 2025		
Ontario Motor Coach Association Marketplace	3-5	Markham, ONT
National Tour Association's Travel Exchange	9-12	Ottawa, ONT
Maryland Tourism Coalition Tourism & Travel Summit	17-19	College Park, MD
Tour Connect (International Association of Tour Directors & Guides)	17-21	Hanover, MD
DECEMBER 2025		
US Tour Operators Association Annual Conference	1-5	National Harbor, MD
JANUARY 2026		
American Bus Association Marketplace	10-13	Reno, NV
FEBRUARY 2026		
Great American Outdoor Show	7-15	Harrisburg, PA
MARCH 2026		
Pennsylvania Bus Association Marketplace	30-31	Williamsport, PA
APRIL 2026		
Destination Capitol Hill	14-15	Washington, D.C.
Southeast Travel Counselors Alliance	TBA	TBA
MAY 2026		
National Travel & Tourism Week	3-9	Statewide
IPW Marketplace	18-22	Fort Lauderdale, FL
Pennsylvania Outdoor Writers Association Conference	TBA	Erie, PA
JUNE 2026		
Pennsylvania Bus Association Annual Meeting/Sales Retreat	22-25	Pocono Manor, PA
Maryland Municipal League Summer Conference	22-25	Ocean City, MD



INDUSTRY CHECKLIST: WAYS TO WORK WITH US

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.

WEBSITE PRESENCE ON VISITMARYLAND.ORG

- ☐ Ensure your business, event and packages/deals are accessible to travel decision-makers (more than 3 million annually).
- ☐ Review [VisitMaryland.org](https://www.visitmaryland.org) and search to be sure your business listing is present and accurate.
- ☐ Sign in to our self-entry portal to add and/or edit your business listings, upload events and offer package deals and discounts to the [VisitMaryland.org](https://www.visitmaryland.org) web site.
- ☐ Check your listing often to ensure that it capitalizes on thematic programs and MOTD marketing activities, and thematic/seasonal campaigns.

➤ **Brandon Chan, 301-447-3719, brandon.chan@maryland.gov or Florence Brant, 301-293-4172, florence.brant@maryland.gov**

BRANDING AND ADVERTISING

- ☐ Use our branding and creative assets in your advertising.
- ☐ Submit photos to our WebDAM (Web Digital Asset Management) for Maryland Office of Tourism use.

➤ **Brian Lawrence, 410-767-6299, brian.lawrence@maryland.gov**

MEDIA RELATIONS AND SOCIAL MEDIA

- ☐ Send your press releases to us and participate in travel media familiarization tours (FAM tours).
- ☐ Provide tickets/prizes for Maryland Mondays giveaways on social media.
- ☐ Follow us on social media: TravelMD (Facebook and X) @visitmaryland (Instagram and LinkedIn).
- ☐ Use our hashtag #MDinFocus on social media.

➤ **Leslie Troy, 410-767-6298, ltroy@visitmaryland.org or Ana Hall-Defoor, 410-804-2120, ana.hall-defoor@visitmaryland.org**

GROUP TOUR AND TRAVEL TRADE SALES

- ☐ Create group tour experiences and share with us!
- ☐ Get help reaching the domestic and international travel trade market — group tours, student groups, reunions and receptive travel buyers.
- ☐ Participate in sales missions and trade show outreach and receive group tour leads.

➤ **Rich Gilbert, 410-767-6288, rgilbert@visitmaryland.org**

MARYLAND WELCOME CENTERS

- ☐ Meet Travel Sales team members at any of the eight Maryland Welcome Centers and your local Visitor Center to share your information.

➤ **info@visitmaryland.org**

- ☐ Distribute your brochures and display marketing materials at Maryland Welcome Centers.

➤ **Marti Banks, 301-490-2444, marti.banks@maryland.gov**

TOURISM DEVELOPMENT

- ☐ Market your story through the National UGRR Network to Freedom, National Civil Rights Network, Chesapeake Bay Storytellers and Scenic Byways programs.

➤ **Anne Kyle, 410-767-0696, anne.kyle@maryland.gov**

INDUSTRY RESOURCES AND MORE

- ☐ Find more opportunities, plus resources, marketing plans, research, newsletters and links on [Industry.VisitMaryland.org](https://www.Industry.VisitMaryland.org)

➤ **Lisa Hansen Terhune, 410-699-3711, lisa.hansenterhune@maryland.gov**



Utilize the resources and information on the Maryland Office of Tourism industry web site, [Industry.VisitMaryland.org](https://www.Industry.VisitMaryland.org)



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