



 MARYLAND TOURISM DEVELOPMENT BOARD

FIVE-YEAR STRATEGIC PLAN

FY27-FY31

A measurable framework to guide and promote the coordinated development of travel and tourism across Maryland.

Photo: Chesapeake Bay Bridge / @emilinaablum - Maryland Office of Tourism

INSIDE THIS PLAN

*Prepared by Coraggio Group with the
Maryland Tourism Development Board
and the Maryland Office of Tourism
Development.*

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MARYLAND'S TOURISM ECONOMY

ONE OF THE STATE'S MOST SIGNIFICANT ECONOMIC ENGINES

In 2024, 45.8 million visitors spent \$21.2 billion across the state's tourism economy, generating a total economic impact of \$32.3 billion. Tourism activity generated \$2.5 billion in state and local taxes in 2024. Without this tax revenue, every Maryland household would pay an additional \$1,051 in taxes. Nearly 194,000 jobs across the state are supported by this spending, making tourism one in every 21 jobs in Maryland and the 11th-largest private-sector employer statewide, just above manufacturing. Private-sector confidence in the industry continues, with tourism-related capital investment totaling \$1.135 billion in 2024.

Maryland's position as a mid-Atlantic drive-market destination is one of its most durable competitive advantages. Domestic visitors account for nearly 95% of all spending, and the overnight market generates more than three-quarters of visitor dollars, which reinforces Maryland's position as a drive-market destination whose core strength lies in attracting visitors from neighboring states for multi-day stays. This geographic positioning, paired with a product that spans Appalachian peaks, Chesapeake waterways, Atlantic beaches, and one of the country's densest concentrations of history and heritage assets, gives Maryland a breadth of visitor experiences few peer states can match in a comparable footprint.

But competitive positioning alone does not guarantee competitive outcomes. Virginia, Pennsylvania and New York each invest multiples of what Maryland spends to attract the same mid-Atlantic traveler in an expensive and competitive market. The scale of what Maryland's tourism economy already delivers, and the gap between that performance and what sustained, strategic investment could unlock, is exactly what makes this plan essential.

45.8M

Visitors to Maryland in 2024

\$21.2B

Visitor spending

\$2.5B

State and local taxes generated

\$32.3B

Total economic impact

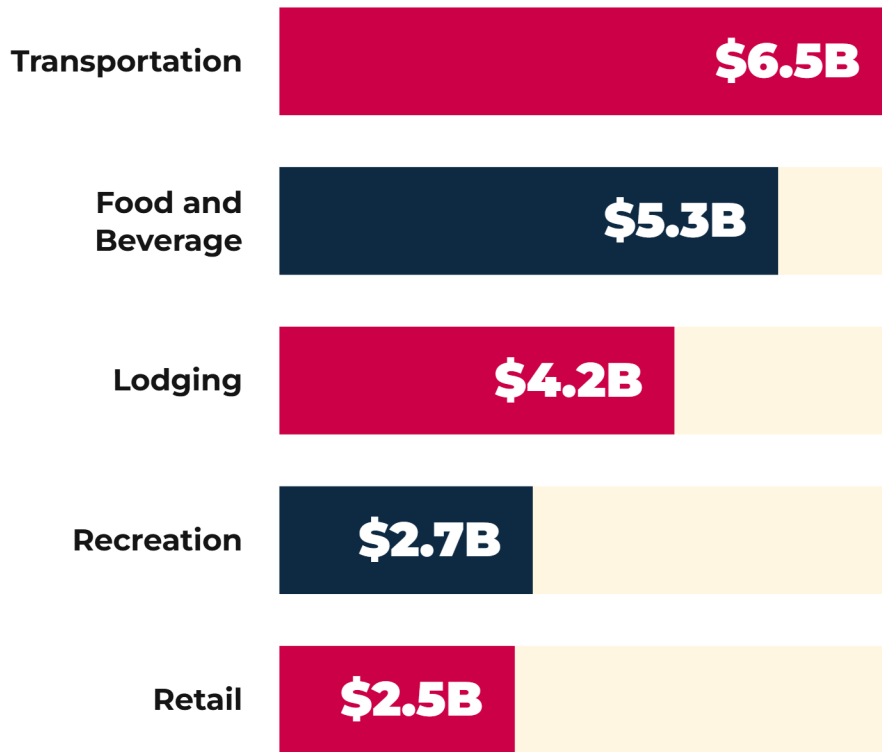
194K

Jobs supported statewide — 1 in every 21

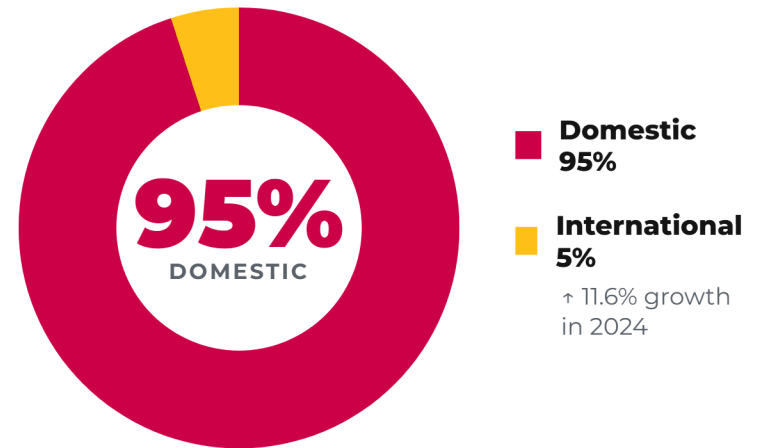
2024 figures · Source: Tourism Economics

VISITOR SPENDING

WHERE THE \$21.2 BILLION IN VISITOR SPENDING GOES



Direct visitor spending by category, 2024 · Source: Tourism Economics



75%+
of visitor dollars come from the overnight market.

\$1.135B
tourism-related capital investment in 2024.

MTDB OVERVIEW

WHAT IS THE MARYLAND TOURISM DEVELOPMENT BOARD?

The Maryland Tourism Development Board (MTDB or Board) is the 24-member state body charged under Title 4, Subtitle 2 of the Economic Development Article of the Maryland Code to guide, stimulate, and promote the coordinated development of travel and tourism in Maryland. The Board works alongside the Maryland Office of Tourism Development (OTD) within the Department of Commerce to set strategic direction and support sustained investment in the tourism economy.

This plan arrives at a moment of both opportunity and transition for Maryland tourism. The state is building on post-pandemic recovery, navigating an increasingly competitive ecosystem with nearby state investment, adapting to shifts in how visitors discover and choose destinations, and preparing for landmark events and development initiatives. At the same time, the Board is strengthening its own governance, clarifying its convening role within a complex ecosystem, and making the case for consistent, continued investment in tourism as economic infrastructure. This 5-year strategic plan is intended to meet the moment MTDB finds itself in 2026 but stay dynamic for the Board's evolution. The plan provides a structured, measurable framework for the Board and OTD to advance Maryland's standing as a tourism destination.



THE STATUTORY MANDATE

MTDB STATUTE

Maryland law requires the Board to draft and implement a five-year strategic plan for the promotion and development of tourism in the state (§ 4-211). That plan, in turn, provides the statutory foundation for the Board's annual marketing plan (§ 4-212). This document fulfills that mandate and establishes the Board's direction from fiscal year 2027 to fiscal year 2031.

§ 4-211 • Additional Duties; Strategic Plan

“The Board shall draft and implement a 5-year strategic plan for the promotion and development of tourism in the State.”

§ 4-212 • Additional Duties; Marketing Plan

“(a) The Board shall draft and implement an annual marketing plan consistent with the strategic plan developed under § 4-211 of this subtitle. (b) The Board shall establish an annual operating budget consistent with the marketing plan.”

Together, these sections establish a tiered planning structure: a five-year strategic plan provides the foundation, an annual marketing plan operationalizes it, and an annual operating budget funds it. Adopting this plan upholds the legal foundation for the Board's continued operations and establishes a clear, actionable roadmap for advancing the benefits of tourism throughout Maryland.

A TIERED PLANNING STRUCTURE



PROCESS AND METHODOLOGY

A RIGOROUS AND ENGAGING PROCESS

This strategic plan was developed through a six-month collaborative process led by Coraggio Group in partnership with MTDB and OTD from December 2025 to June 2026. The planning committee oversaw selection of the consultant and the development of the plan, working with Coraggio on stakeholder outreach, data collection, Board meetings, and review of drafts. The process was designed to ground the plan in data, draw on the knowledge of Maryland’s tourism stakeholders, benchmark Maryland against comparable and competitive states, and produce a framework the Board could adopt and act on with confidence.

STAKEHOLDER ENGAGEMENT

The planning process began with significant stakeholder engagement through multiple avenues:

276

SURVEY RESPONSES

An online survey distributed to tourism stakeholders statewide, capturing perspectives on Maryland tourism, perceptions of MTDB and OTD, regional priorities, and opportunities.

14

INTERVIEWS

Virtual one-on-one interviews with key stakeholders to surface themes a survey alone could not capture.

70

DISCUSSION GROUP ATTENDEES

Six regional discussion groups (70 attendees) assessing the industry’s needs, challenges, and priorities.

54

RESONANCE SURVEY RESPONSES

Discussion group and interview participants, plus MTDB members and OTD staff, re-engaged in May 2026 to review the draft plan.

Surveys, interviews, and stakeholder discussions were conducted as part of the predecisional planning process. The input was used to inform deliberations and the development of draft recommendations before any final decisions were made.

SITUATIONAL ANALYSIS SUMMARY

SEVEN THEMES FROM ACROSS MARYLAND

After intensive data review and stakeholder engagement, a comprehensive situational analysis was created to provide evidence and foundation for the plan's strategic direction. The analysis examined Maryland's competitive position, visitation and spending trends, regional performance data, stakeholder sentiment, and the policy and funding environment. Below are the summary of stakeholder engagement themes and the SWOT analysis (strengths, weaknesses, opportunities, and threats) that helped inform the strategic plan.

1 Maryland's tourism industry is aligned, engaged, and ready to be mobilized around greater investment.

Across every region and stakeholder group, the most consistent message was that Maryland's tourism economy has outgrown its current level of public investment, and the industry is ready to make the case for more.

2 MTDB has an identity and awareness gap.

Limited stakeholder awareness of the Board and its work creates a perception of limited impact and effectiveness.

3 The Board's influence and role can be better defined and activated.

MTDB has powers that extend beyond advisory functions, but those powers are not consistently exercised or visible to the industry.

4 There is a need for a more cohesive statewide brand and storytelling architecture.

A stronger statewide brand architecture would give Maryland's diverse destinations and experiences a common framework for rolling up into a coherent, competitive state-level identity.

5 Maryland can expand how it defines, measures, and coordinates its tourism economy.

Current measurement frameworks are weighted toward hotel infrastructure and may not capture the full breadth of visitor spending and impact.

6 Regional equity and rural visibility need attention.

Communities across the state acknowledge gaps in regional equity and rural visibility in tourism promotion.

7 Workforce and visitor-experience infrastructure are strategic constraints, not side issues.

Workforce shortages, wayfinding gaps, transportation limitations, and welcome center capacity directly impact the visitor experience and limit growth.

SWOT ANALYSIS

WHERE MARYLAND TOURISM STANDS

S STRENGTHS

- ◆ **Drive-market positioning:** 4 of the top 10 wealthiest U.S. counties are within an hour of Maryland, and the state draws the majority of its visitors from its own residents and neighboring Pennsylvania, Virginia, New Jersey, and New York. Maryland is approximately an overnight drive to 1/3 of the U.S. population.
- ◆ **Product diversity in a compact geography:** History and heritage, arts and culture, outdoor recreation, culinary, craft beverage, and waterfront experiences all sit within a two-hour drive.
- ◆ **Statutory authority:** MTDB sets spending policies, directs grant funding, and holds revenue-generating powers.
- ◆ **Built-in advocacy network:** A 24-member, cross-sector, bipartisan Board provides direct lines to state leadership.
- ◆ **Industry-grade data:** Research partnerships with Tourism Economics, D.K. Shifflet, and STR provide credible measurement of the tourism economy.

O OPPORTUNITIES

- ◆ **Shift toward place-based, slow travel:** Visitor preferences are moving toward authentic, purpose-driven, and culturally specific experiences. Maryland's heritage assets, culinary identity, scenic byways, and waterfront culture are naturally positioned for this shift.
- ◆ **Underleveraged cross-agency partnerships:** Existing relationships with state agencies in transportation, natural resources, arts and culture, workforce, and outdoor recreation represent untapped capacity, and formalizing these partnerships could expand the Board's reach without requiring proportional budget increases.
- ◆ **AI and digital innovation:** Early investment in AI-ready content, trip-planning tools, and structured data positions Maryland ahead of competitors relying on legacy strategies.
- ◆ **International market recovery:** International visitor spending grew 11.6% in 2024 and now represents 5.3% of total spending, up from 4.6% the prior year. The Maryland International Marketing Partnership creates a structure to accelerate this trend while most competitors are still rebuilding their international programs.
- ◆ **Surge in road trips:** Domestic drive-market travel continues to outpace fly-market recovery nationally, and Maryland's visitor profile is overwhelmingly domestic, car-dependent, and from nearby states — aligned with where demand is growing.

W WEAKNESSES

- ◆ **Investment gap:** As of 2026, Maryland's \$11M tourism marketing budget is roughly 1/3 of Virginia's tourism budget and well below the \$19.8M national average of funding for state tourism offices.
- ◆ **Board identity:** Stakeholders most frequently describe MTDB as "ineffective" and "unknown," and its value proposition is not understood by the industry it serves.
- ◆ **Governance gaps:** Uneven meeting attendance, officer vacancies, and limited geographic representation undermine the Board's credibility and consistency.
- ◆ **Fragmented advocacy:** MTDB, the Maryland Tourism Coalition (MTC), and the Maryland Association of Destination Marketing Organizations (MDMO) operate without a defined coordination model, diluting the industry's collective voice.

T THREATS

- ◆ **Competitive spending gap is accelerating:** Nearby states like Virginia, Pennsylvania, West Virginia, and New York are investing more in tourism while Maryland stays the same. Every year the gap widens, and Maryland loses its share of the same drive-market traveler those states depend on.
- ◆ **Structural workforce shortages:** Hospitality employment gaps in Maryland are sharper than the national pattern, and wage growth is lagging, which can limit the industry's ability to grow.
- ◆ **Macroeconomic and federal uncertainty:** Geopolitical volatility, inflation, and shifting federal policy create an unpredictable environment for travel spending and public-sector budgets alike.
- ◆ **AI in trip planning:** VisitMaryland.org engagement declines are consistent with the national pattern, as visitors are increasingly finding and choosing destinations through AI-powered tools rather than DMO websites and traditional search.
- ◆ **Overnight visitation stalled:** Overnight visitor volume was flat in 2024, but it is a valuable segment, since these visitors spend nearly five times more per person than day trippers.

THE BUILDING BLOCKS

WHO IS THIS PLAN FOR?

This strategic plan is designed to provide direction for the Maryland Tourism Development Board (MTDB) over the next five years, organizing the work into a clear roadmap that connects the Board's highest-level aspirations to the specific actions and measures that will demonstrate progress. Every element of the plan is tied to a defined outcome, and understanding how these elements work together is essential to implementing the plan effectively.

PLAN ELEMENTS

The plan is organized around: 1) an updated vision, mission, and set of values that define the Board's aspirations and operating principles; 2) four strategic goals that structure all of the Board's and OTD's work over the next five years; and 3) two enabling priorities that run through every goal.

The vision, mission, and values provide the foundation for the strategic plan. Together, they define the future the Board is working toward, clarify its purpose in advancing Maryland tourism, and establish the principles that guide decision-making and action. These elements serve as the lens through which the Board's goals, priorities, and initiatives should be understood and implemented.

The strategic goals are the primary areas of focus that organize all of the Board's and OTD's work over the plan period. These are not individual projects or tasks; they are the broad categories of effort the Board has committed to advancing. Running across all four goals are two enabling priorities, data and research and elevating tourism's

standing, that are not standalone goals but rather capabilities and conditions that must be strengthened for every goal to succeed.

Within each strategic goal, the plan identifies an outcome, a plain-language narrative of what success looks like when the goal is fully realized. The activities themselves are captured as initiatives, the specific projects, programs, and actions MTDB will pursue. Initiatives are the "what we will do" of the plan, and they will evolve over the five-year period as conditions change and early work creates new opportunities. Finally, Key Performance Indicators (KPIs) are the data points the Board will track to assess whether the initiatives are producing the intended outcomes.

In practice, the Board and OTD will spend most of their time working on initiatives and reviewing KPIs, checking progress against the outcomes, and periodically confirming that the strategic goals still reflect the right priorities. The plan should be revisited annually to assess which initiatives are on track, which KPIs are moving in the right direction, and where adjustments are needed.

THE BUILDING BLOCKS

HOW THE PLAN FITS TOGETHER

This plan provides direction for MTDB over the next five years, connecting the Board's highest-level aspirations to the specific actions and measures that demonstrate progress. It is built around a vision, mission, and values; four strategic goals; and two enabling priorities that run through every goal.

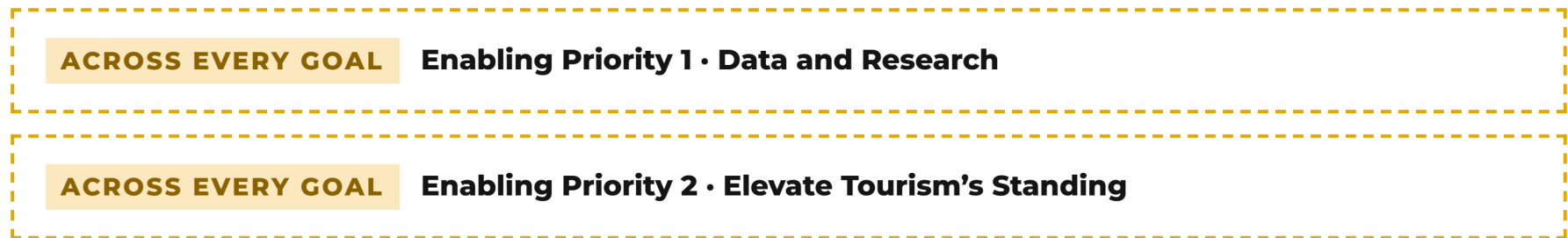
ELEMENT	WHAT IT IS	WHAT IT ANSWERS
VISION	The aspirational future state for Maryland as a destination that the plan works toward.	<i>"Where are we going?"</i>
MISSION	The Board's core purpose and how it contributes to that future.	<i>"Why do we exist?"</i>
VALUES	The principles that guide how the Board does its work.	<i>"What do we stand for?"</i>
STRATEGIC GOALS	The primary areas of focus that organize all work over the five-year period.	<i>"What are we working on?"</i>
ENABLING PRIORITIES	Capabilities that must be strengthened for every goal to succeed.	<i>"What must we get right everywhere?"</i>
OUTCOMES	Plain-language descriptions of what success looks like when a goal is realized.	<i>"What does success look like?"</i>
INITIATIVES	The specific projects, programs, and actions the Board will pursue.	<i>"What actions are we taking?"</i>
KEY PERFORMANCE INDICATORS (KPIs)	The data points tracked to assess whether initiatives are producing the outcomes.	<i>"How will we know it's working?"</i>

PLAN ARCHITECTURE

FROM ASPIRATION TO ACTION



FOUR STRATEGIC GOALS






PART THREE

THE STRATEGIC PLAN

Photo: Monocacy River Valley · Maryland Office of Tourism



◆ PLAN OVERVIEW · OUR VISION



Maryland is where people, places, and natural beauty come together; creating a destination that is timeless, welcoming, and ever evolving.

Photo: Janes Island State Park · Maryland Office of Tourism

OUR MISSION

To grow the success of Maryland's tourism economy by collaborating with industry partners, elevating the state's diverse destinations and communities, and delivering value for visitors and residents.

OUR VALUES

◆ **COLLABORATION**
We do our best work together, across the Board, with OTD, and alongside the tourism industry we serve.

◆ **EXPERTISE**
We bring deep industry knowledge to the table and use it to inform sound decisions for Maryland's tourism economy.

◆ **COMMITMENT AND ENGAGEMENT**
We show up, do the work, and follow through on the responsibilities of serving Maryland tourism.

◆ **COMMUNICATION**
We work openly, share information honestly, and make our decisions and processes clear to the industry.

◆ **BELIEF IN MARYLAND**
We champion a deep belief in Maryland, the diversity of its assets, and the power of travel to strengthen the state.

◆ **STEWARDSHIP**
We hold ourselves responsible for the long-term health of Maryland's tourism economy and the communities that host it.

THE WORK AHEAD

FOUR GOALS. TWO ENABLING PRIORITIES.

Strategic goals are the primary areas of work that organize the plan's initiatives, each representing a distinct set of responsibilities the Board and OTD will advance over the next five years.

01

ACTIVATE AND DEFINE THE BOARD'S ROLE

Build a culture of participation and accountability, establish clear governance, and equip every member as an advocate.

02

BUILD A COHESIVE AND COLLABORATIVE ECOSYSTEM

Position MTDB and OTD as the conveners of the industry, breaking down silos with a coordinated framework.

03

SUPPORT DESTINATION DEVELOPMENT

Strengthen DMO capacity and the support structures that shape the visitor experience on the ground.

04

STEWARD THE MARYLAND TOURISM BRAND

Build brand consistency and recognition, invest in targeted campaigns, and listen to stakeholders and visitors.

ENABLING PRIORITIES THROUGHOUT THE STRATEGIC GOALS

These priorities run through every pillar of the plan, shaping how each area of work is resourced, measured, and connected to the broader case for tourism investment.

Data and Research

Reliable data, industry intelligence, and market research are essential to effective decision-making, performance measurement, and advocacy. This priority focuses on strengthening the Board's ability to use evidence to guide investments, evaluate outcomes, identify opportunities, and communicate tourism's impact.

Elevate Tourism's Standing

Achieving the plan's goals requires broader recognition of tourism as a driver of economic development, community vitality, and quality of life. This priority focuses on strengthening awareness, understanding, and support for tourism among policymakers, partners, stakeholders, and the public, creating the conditions necessary for sustained investment and long-term success.

01

STRATEGIC GOAL

ACTIVATE AND DEFINE THE BOARD'S ROLE

OUTCOME

A consistently engaged, well-governed Board that is visible and effective as an advocate for Maryland tourism.

MTDB has statutory authority to set spending policies, direct grant funding, and support tourism investment initiatives. This authority only matters if the Board is consistently engaged, well-governed, and visible to the people and institutions it needs to influence. This goal focuses on building a culture of participation and accountability within the Board itself, establishing clear governance processes, and equipping every member to serve as an effective advocate for tourism investment in legislative and policy settings.

KPIs — HOW WE MEASURE SUCCESS

75% avg. annual
attendance

Board Engagement and Representation: Improve Board participation and engagement by achieving at least **75% average annual meeting attendance** and completing an annual Board skills and representation assessment to identify recruitment priorities and address representation gaps.

8→12 advocacy activities
/ yr

Advocacy and Visibility: Increase Board advocacy through a minimum of **eight advocacy/outreach activities** in years 1–2, rising to 12 in years 3–5, with every Board member participating in at least one each year.

INITIATIVES — WHAT WE'LL DO

- ◆ Implement a culture of consistent participation and accountability for board engagement.
- ◆ Adopt a formal onboarding and offboarding strategy, with structured orientation and a strategic approach to recruiting new members.
- ◆ Develop a board skills and representation matrix, reviewed annually with identified gaps.
- ◆ Increase MTDB's visibility among tourism stakeholders and elected officials (including evaluating a potential name change) by positioning the Board as a valued statewide partner and resource for tourism funding with a mandate to improve tourism outcomes across Maryland.
- ◆ Work with OTD to identify and prioritize data, research, and industry insights needed to strengthen policymaker, legislative, and stakeholder engagement and advocacy.

DATA AND RESEARCH

- ◆ Equip Board members to be consistent, prominent advocates in legislative and policy settings.

ELEVATE TOURISM'S STANDING

02

STRATEGIC GOAL

BUILD A COHESIVE AND COLLABORATIVE TOURISM ECOSYSTEM

OUTCOME

Reducing fragmentation, MTDB and OTD are recognized as the primary conveners of Maryland's tourism industry with formalized partnerships and a coordinated investment framework across the ecosystem.

Maryland's tourism landscape includes DMOs, state agencies, trade associations, hospitality businesses, and attractions. With so many relevant stakeholders and industry groups, it can be a difficult landscape to navigate. This goal positions MTDB and OTD as the conveners of the industry by breaking down silos and building a coordinated framework that makes the ecosystem stronger than the sum of its parts.

KPIs — HOW WE MEASURE SUCCESS

8/yr collaboration activities

Partnership and Coordination: Improve partner net promoter score (NPS) through participation in a minimum of **eight coordinated collaboration activities annually** with DMOs, industry organizations, agencies, and other relevant stakeholder groups to strengthen statewide alignment, partnership development, and coordinated investment.

5 regional forums, bi-annually

Industry Engagement: Improve stakeholder net promoter score (NPS) by convening **bi-annual tourism forums** in each of Maryland's five tourism regions.

INITIATIVES — WHAT WE'LL DO

- ◆ Develop and implement a communications plan positioning MTDB and OTD as the conveners of Maryland's tourism industry.
- ◆ Build partnerships with state agencies whose work influences tourism outcomes to align priorities, coordinate investments, and support growth in Maryland's tourism economy (e.g. transportation, workforce, public safety, labor, natural resources, arts and culture, and outdoor recreation).
- ◆ Strengthen partnerships with MDMO, MTC, DMOs, trade associations, workforce organizations, and local agencies to advance shared priorities of the industry.
- ◆ Expand data collection partnerships and assess whether measurement frameworks capture the full breadth of the tourism economy. **DATA AND RESEARCH**
- ◆ Position ecosystem coordination as evidence of tourism's maturity and embed it in state-level policy conversations.

ELEVATE TOURISM'S STANDING

**Net Promoter Score (NPS) is a widely used customer and stakeholder satisfaction metric that measures how likely someone is to recommend an organization, product, service, or experience to others.*

03

STRATEGIC GOAL

SUPPORT DESTINATION DEVELOPMENT

OUTCOME

Stronger destination development across the state, with growing DMO capacity, a modernized grant program, improved visitor experience infrastructure, and measurable progress across all regions.

Maryland's tourism product varies significantly by region in DMO capacity, visitor infrastructure, workforce readiness, and access to state resources. This goal addresses those disparities by strengthening technical support to DMOs and advancing tourism support structures that shape the visitor experience on the ground.

KPIs — HOW WE MEASURE SUCCESS

5/yr development projects

Destination Development and

Advancement: Advance statewide destination development by supporting at least **five tourism infrastructure, placemaking, visitor experience, and/or destination enhancement projects annually.**

Annual review

DMO Grant Program: Improve oversight and effectiveness of the DMO Grant Program through **annual review** of grant policies, procedures, investments, and program outcomes.

INITIATIVES — WHAT WE'LL DO

- ♦ Bolster technical support offerings to DMOs to build capacity in data utilization, digital marketing, and workforce development.
- ♦ Review DMO grant program structure and formula to address equity gaps in distribution and strengthen grant performance in advancing statewide tourism outcomes.
- ♦ Support advancements in accessibility and wayfinding, transportation, workforce development, and visitor safety improvements that improve the visitor experience.
- ♦ Strengthen the use of data and research to inform decision-making, improve tourism investments, and measure outcomes across Maryland's tourism ecosystem — providing DMOs and local partners with the data, tools, and insights needed to build capacity and evaluate destination performance.

DATA AND RESEARCH

- ♦ Continue to build a compelling narrative around destination development to reframe tourism as economic development and infrastructure investment, not solely a marketing function.

ELEVATE TOURISM'S STANDING

04

STRATEGIC GOAL

STEWARD THE MARYLAND TOURISM BRAND

OUTCOME

A recognizable, consistent, and well-managed Maryland tourism brand that drives multi-night stays, addresses seasonality, brings in the most return on investment (ROI), reaches underserved markets, and is shaped by stakeholder and visitor input.

Maryland competes for attention in one of the country's most crowded destination markets, bordered by states that are outspending it and building recognizable brands. Building and sustaining brand awareness signals to visitors that Maryland is a destination worth choosing and revisiting. This goal focuses on building brand consistency and recognition, investing in targeted campaigns, and creating feedback systems that ensure the brand is shaped by both stakeholder and visitor perspectives. By influencing travel decisions and aligning stakeholders around a shared vision, the brand serves as a critical tool for driving visitation, investment, and long-term growth in the tourism economy.

KPIs — HOW WE MEASURE SUCCESS

Brand Performance: Increase campaign-attributable hotel bookings and improve tourism marketing return on investment (ROI) annually. Examples:

\$132M

Hotel bookings ·
FY25 baseline (Adara)

\$55:1

Campaign ROI ·
FY25 baseline

Brand Reach: Grow brand-aligned earned media placements. Examples:

732

Travel-article placements · FY25

INITIATIVES — WHAT WE'LL DO

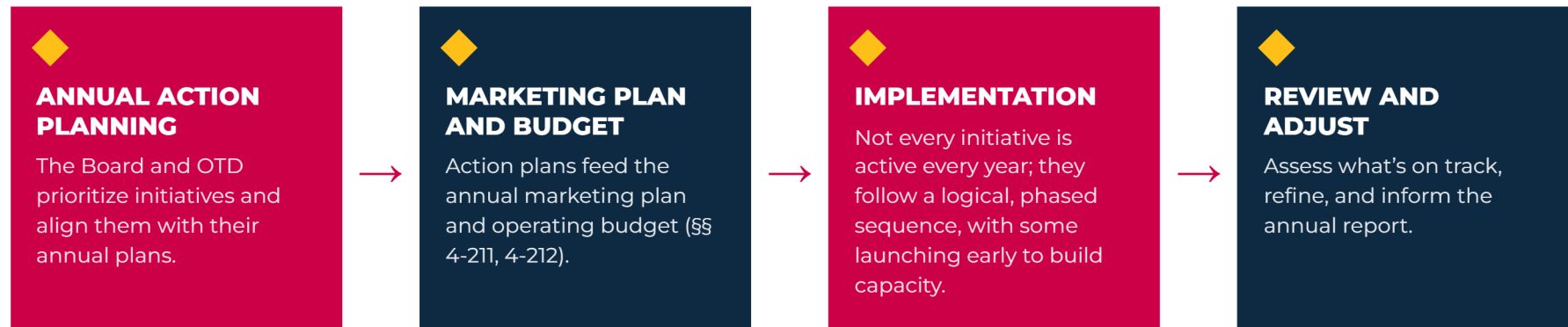
- ◆ Enhance technical support and implementation of the statewide brand toolkit.
- ◆ Develop consistent storytelling that improves brand recognition and Maryland's competitive edge.
- ◆ Invest in marketing campaigns that address seasonality and rural tourism opportunities.
- ◆ Formalize and implement stakeholder feedback in brand and marketing planning.
- ◆ Develop visitor feedback data collection systems. **DATA AND RESEARCH**
- ◆ Position a recognizable, sustained brand as an advocacy tool, compelling narrative, and greater economic development initiative.

ELEVATE TOURISM'S STANDING

KEEPING THE PLAN DYNAMIC

AN ANNUAL CYCLE AND EVALUATION

This strategic plan establishes direction where the Board and OTD are headed, what outcomes they are working toward, and how they will measure progress. The work of translating strategic goals into sequenced, resourced, and assigned actions happens through an annual implementation cycle that keeps the plan dynamic without requiring it to be rewritten.



THE CYCLE REPEATS EVERY YEAR

ANNUAL PRIORITIZATION

Initiative prioritization is guided by a consistent set of considerations the Board revisits annually:

READINESS

Are the resources, partnerships, and data in place to move forward — or does prerequisite work need to happen first?

TIMING

Does it align with a legislative session, a landmark event, or a funding cycle that would be missed by waiting?

RESPONSIBILITY

Who will lead the work on this initiative, and what other partnerships are needed to accomplish it?

IMPACT AND REACH

Will it advance outcomes across multiple goals or regions, or address a critical gap that limits progress elsewhere?

PROGRESS REVIEW

The Board conducts a formal annual review to assess which initiatives are on track, which KPIs are moving in the right direction, and where conditions have changed enough to warrant adjustments, informing the next year's action plan and the annual report.

GLOSSARY OF TERMS

A shared vocabulary for the plan — A through M

Adara

A travel data and analytics platform used to connect hotel bookings to specific marketing activity.

Brand Toolkit

A package of guidelines, logos, templates, photography, and messaging partners use for consistent statewide branding.

Campaign-Attributable Hotel Bookings

Hotel bookings traced directly to a marketing campaign through digital tracking — \$132M in FY2025.

Campaign Return on Investment (ROI)

Economic value generated per marketing dollar spent. FY2025 ROI was \$55 to \$1.

Convener

An organization that brings others together to coordinate work and reduce duplication — the role envisioned for MTDB and OTD.

Destination Development

Strengthening a place's tourism offerings through infrastructure, experiences, and visitor services — distinct from marketing.

Destination Marketing Organization (DMO)

A local, county, or regional organization that promotes tourism to a specific area and receives MTDB grants.

Enabling Priority

A capability supporting all four goals: Data and Research, and Elevating Tourism's Standing.

Fort to 400 Commission

Established in 2021 to commemorate the 400th anniversary of Maryland's founding in 2034; OTD provides staff support.

Fragmentation

When organizations operate without coordination, causing duplicated effort and weaker collective impact.

Initiative

A specific project, program, or action the Board pursues to achieve a strategic goal.

Key Performance Indicator (KPI)

A measurable data point used to track progress toward an outcome.

LEC Committee

Legislative Committee of the Maryland Tourism Coalition.

Marketing Plan

The annual operational document required by § 4-212, consistent with the five-year strategic plan.

Maryland 250 Commission

Authorized in 2023 to lead Maryland's commemoration of the 250th anniversary of American independence in 2026.

Maryland Association of Destination Marketing Organizations (MDMO)

The statewide trade association representing Maryland's county and regional DMOs.

Maryland International Marketing Partnership

A cross-agency partnership focused on attracting international visitors to Maryland.

Maryland Office of Tourism Development (OTD)

The Department of Commerce office providing staff support to MTDB; its director serves as Executive Director.

Maryland Tourism Coalition (MTC)

A 50+ year membership organization advocating for the tourism industry; sponsors Tourism Day in Annapolis.

Maryland Tourism Development Board (MTDB)

The 24-member state board guiding tourism strategy, spending policy, and the DMO grant program.

MTDB Fund

The special, nonlapsing fund (§ 4-215) financing tourism planning, promotion, and development; min. \$6M annual appropriation.

GLOSSARY (CONT.) *M through V*

Meet in Maryland Partnership

A cross-agency partnership focused on attracting meetings and conventions business to Maryland.

Mission

The Board's core purpose and how it contributes to the vision.

Net Promoter Score (NPS)

A loyalty and satisfaction measure asking how likely respondents are to recommend an organization (0–10 scale).

Occupancy Rate

The share of available hotel rooms filled. Maryland's statewide baseline is 61.8%.

Off-Peak Season

Lower-demand periods outside peak summer. In Maryland, Oct–Dec accounts for 19% of overnight trips.

Outcome

A plain-language description of what success looks like when a goal is fully realized.

Room Revenue

Total revenue from hotel room sales; tracked year-over-year as a destination-development KPI.

Seasonality

The pattern of demand fluctuating across the year; growing shoulder-season visitation is a Goal 4 priority.

Stewardship

Responsible care for tourism assets and host communities; a Board value tied to § 4-210.

Strategic Goal

A primary area of focus organizing the Board's work over the five-year plan period.

Tourism Capital Investment

Investment in physical infrastructure of the tourism economy — \$1.135B in Maryland in 2024.

Tourism Ecosystem

The network of organizations producing the visitor experience: DMOs, agencies, businesses, and attractions.

Tourism Tax Increment

The annual growth in sales-tax revenue on tourism goods/services (§ 4-216) that may augment the MTDB Fund.

Travel-Article Placement

Earned media coverage generated through PR rather than paid advertising — 732 placements in FY2025.

Values

The principles guiding how the Board works: Collaboration, Expertise, Commitment, Communication, Belief in Maryland, Stewardship.

Vision

The aspirational future state for Maryland as a destination that the plan works toward.

Visitor Economy

Total economic activity generated by visitor spending, plus its indirect and induced effects.

VisitMaryland.org

The official state tourism website operated by OTD; FY2025 baseline of 546,099 outbound clicks to partners.

WITH GRATITUDE

This plan reflects the contributions of many individuals and organizations across Maryland's tourism community. Thank you to all who participated, contributed, and engaged in this strategic planning process.

STRATEGIC PLANNING COMMITTEE

- CHAIR Andrew Frank**, Cap Ex Advisory Group
- CO-CHAIR Kristen Goller**, Talbot County Economic Development and Tourism
- CO-CHAIR Liz Mildenstein**, Visit St. Mary's
- Dave Ferraro**, Friends of Patapsco Valley State Park
- Lisa Hansen Terhune**, MD Office of Tourism Development
- Amanda Hof**, Howard County Tourism
- Melonie Johnson**, MGM National Harbor
- Gerardo Martinez**, Wild Kid Acres LLC
- Sandy Maruchi-Turner**, Cecil County
- The Hon. James N. Mathias, Jr.**, Former MD Senate, District 38
- Levern McElveen**, Levern McElveen and Associates
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Prepared by **Coraggio Group** with the Maryland Tourism Development Board and Office of Tourism Development, 2026.

CONNECTIONS TO STATUTE

STRATEGY GROUNDED IN STATUTE

Maryland law requires the Board to produce a five-year strategic plan. The relevant provisions, as enacted in the Economic Development Article of the Annotated Code of Maryland, are mapped to each plan element below.

PLAN ELEMENT	STATUTE SECTION	HOW THE PLAN FULFILLS THE STATUTE
VISION, MISSION AND VALUES		
Vision — Maryland is where people, places, and natural beauty come together; creating a destination that is timeless, welcoming, and ever evolving.	§ 4-202	Translates the state policy of guiding, stimulating, and promoting coordinated, efficient, and beneficial tourism development into an aspirational future state for Maryland.
Mission — To grow the success of Maryland’s travel and tourism economy by collaborating with industry partners, elevating the state’s diverse destinations and communities, and delivering value for visitors and residents.	§ 4-202; § 4-213(10), (11)	Restates the state policy in operational terms and reflects the duties to cooperate with public and private organizations and to coordinate the tourism activities of local and regional promotional organizations.
Values — Collaboration, Expertise, Commitment, Communication, Belief in Maryland, Stewardship.	§ 4-202; § 4-210(1)	The Stewardship value reflects the statutory duty to protect, preserve, promote, and restore Maryland’s natural, historical, scenic, and cultural resources; Collaboration and Communication support the coordination duties throughout § 4-213.
STRATEGIC GOAL 1 · ACTIVATE AND DEFINE THE BOARD’S ROLE		
Implement a culture of consistent participation and accountability for Board engagement.	§ 4-207; § 4-210	Ensures the Board can meet its statutory duties, including the minimum four meetings per year and the obligation to publish and submit an annual report.
Adopt a formal onboarding and offboarding strategy, with structured orientation and recruitment.	§ 4-204(a), (b), (d)	Supports compliance with the 24-member composition requirements, geographic equity, balanced sector representation, term limits, and recommendations of tourism industry representatives.
Develop a board skills and representation matrix, reviewed annually with identified gaps.	§ 4-204(b)(1)–(3)	Directly supports the requirements to ensure equitable geographic representation, give due consideration to industry recommendations, and provide balanced representation across the lodging, food service,

CONNECTIONS TO STATUTE

STRATEGY GROUNDED IN STATUTE (CONTINUED)

PLAN ELEMENT	STATUTE SECTION	HOW THE PLAN FULFILLS THE STATUTE
STRATEGIC GOAL 1 · ACTIVATE AND DEFINE THE BOARD'S ROLE (CONTINUED)		
Increase MTDB's visibility among stakeholders and elected officials (including a potential name change).	§ 4-210(3); § 4-216(d)	Strengthens the Board's capacity to deliver the required annual report and to make the case for the tourism funding levels described in § 4-216.
Work with OTD to identify and prioritize data, research, and insights to strengthen advocacy.	§ 4-209(b)(4); § 4-213(9)	Exercises the Board's power to request data from other state units and the duty to support research necessary to evaluate, plan, and execute tourism programs.
Equip Board members to be consistent, prominent advocates in legislative and policy settings.	§ 4-210(3); § 4-213(8); § 4-216(d)	Supports the duty to publish the annual report, to review taxes and regulations affecting tourism, and to report to the Governor and General Assembly on funding effectiveness.
STRATEGIC GOAL 2 · BUILD A COHESIVE AND COLLABORATIVE ECOSYSTEM		
Develop a communications plan positioning MTDB and OTD as conveners of the industry.	§ 4-202; § 4-213(10), (11)	Directly supports the duty to promote coordinated development and to coordinate the tourism activities of local and regional promotional organizations.
Build partnerships with state agencies whose work influences tourism outcomes.	§ 4-209(b)(4); § 4-213(10); § 4-216(d)(1)	Supports the powers to request assistance and data from state units, the duty to cooperate with public units, and statutory cooperation with the MDMO referenced in the annual report requirement.
Strengthen partnerships with MDMO, MTC, DMOs, trade associations, and local agencies.	§ 4-213(10), (11); § 4-214(3)	Operationalizes the duties to cooperate with public and private organizations, coordinate local and regional promotional efforts, and administer DMO grants.

CONNECTIONS TO STATUTE

STRATEGY GROUNDED IN STATUTE (CONTINUED)

PLAN ELEMENT	STATUTE SECTION	HOW THE PLAN FULFILLS THE STATUTE
STRATEGIC GOAL 2 · BUILD A COHESIVE AND COLLABORATIVE ECOSYSTEM (CONTINUED)		
Expand data partnerships and assess whether frameworks capture the full tourism economy.	§ 4-209(b)(2), (4); § 4-213(9); § 4-216(d)	Combines the powers to enter into contracts and request data with the research duty and the annual reporting requirement on funding effectiveness.
Position ecosystem coordination as evidence of tourism’s maturity in state-level policy.	§ 4-202; § 4-213(8), (10)	Reinforces the state policy of deriving economic, social, and cultural benefits from tourism and supports the duties to review regulatory matters and cooperate with public units.
STRATEGIC GOAL 3 · SUPPORT DESTINATION DEVELOPMENT		
Bolster technical support to DMOs in data, digital marketing, and workforce development.	§ 4-213(4), (5), (6), (11)	Supports the duties to encourage and facilitate training and education for tourism jobs, provide a healthy environment for workforce development, encourage tourism careers, and assist local and regional promotional organizations.
Review the DMO grant program structure and formula to address equity gaps.	§ 4-204(b)(1); § 4-214(3)	Directly addresses the statutory requirements for equitable geographic representation and the minimum \$2.5 million in annual DMO grants.
Support advancements in accessibility, wayfinding, transportation, and visitor safety.	§ 4-213(2), (3)	Directly fulfills the duties to facilitate tourist movement through signs, information aids, and other services and to improve the safety and security of tourists.
Strengthen the use of data and research to inform decisions and measure outcomes.	§ 4-213(9), (11)	Supports both the research duty and the duty to assist local and regional promotional organizations.
Build a narrative reframing tourism as economic development and infrastructure investment.	§ 4-202; § 4-213(1), (7); § 4-216(d)	Strengthens the case for the state policy on tourism’s economic benefits, the duties to encourage new tourism resources and small business growth, and the annual reporting on funding effectiveness.

CONNECTIONS TO STATUTE

STRATEGY GROUNDED IN STATUTE (CONTINUED)

PLAN ELEMENT	STATUTE SECTION	HOW THE PLAN FULFILLS THE STATUTE
STRATEGIC GOAL 4 • STEWARD THE MARYLAND TOURISM BRAND		
Enhance technical support and implementation of the statewide brand toolkit.	§ 4-213(11); § 4-214(1)	Supports the duty to assist local and regional promotional organizations and the spending policy for tourism advertising and graphic materials.
Develop consistent storytelling that improves brand recognition and competitive edge.	§ 4-214(1), (2); § 4-216(d)(2)(iii), (v)	Operationalizes spending policies for advertising and promotional materials and supports the expectation that the Board improve Maryland’s competitive position with neighboring states.
Invest in marketing campaigns that address seasonality and rural tourism opportunities.	§ 4-212; § 4-214(1), (2)	Provides strategic content for the annual marketing plan and applies the statutory spending policies to address gaps in seasonality and geography.
Formalize and implement stakeholder feedback in brand and marketing planning.	§ 4-204(b)(2); § 4-213(9), (10), (11)	Supports the directives to give due consideration to industry recommendations and to support research, cooperation, and coordination with tourism partners.
Develop visitor feedback data collection systems.	§ 4-213(9); § 4-216(d)(2)(ii)	Supports the research duty and provides the data quantifying tourism marketing success required in the annual report.
Position a recognizable, sustained brand as an advocacy and economic-development tool.	§ 4-210(3); § 4-214(1), (2); § 4-216(d)	Connects brand stewardship to the duties to publish an annual report, set spending policies for tourism advertising and promotion, and report on funding effectiveness.



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MARYLAND TOURISM DEVELOPMENT BOARD

FIVE-YEAR STRATEGIC PLAN

FY27-FY31

Prepared by Coraggio Group with the Maryland Tourism Development Board and Maryland Office of Tourism Development

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Photo: Cove Point Lighthouse / Matthew McKinney