Maryland
OFFICE OF TOURISM

FISCAL YEAR 2019 TOURISM DEVELOPMENT BOARD ANNUAL REPORT

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

Governor's Message

DEAR FRIENDS:

One of the most important jobs I have as governor of this great state is spreading the message that Maryland is an outstanding place to live, work and visit. Each year, we welcome nearly 42 million visitors to enjoy our famous seafood, tour our vibrant cities and towns and spend time on our beaches, mountains and beautiful waterways.

In addition to tourism's critical role in our culture and quality of life, it is also a significant economic driver for our state. We have been hard at work creating a more positive business environment in which our tourism industry can thrive, and in 2018, visitors to our state spent more than $18 billion. This spending helps generate more than $2.5 billion in tax revenue for both state and local governments, saving each Marylander $1,140 in taxes. This growing industry also employs more than 150,000 people.

In addition to these economic benefits, tourism enables us to share our state's rich history and culture with the world. For example, Maryland is celebrated as the strongest Underground Railroad storytelling destination in the nation, and I was proud to proclaim this September International Underground Railroad Month. As we welcome more and more visitors to our great state, we can highlight the stories of incredible Marylanders throughout our history as well as the stories of Marylanders who continue to make history every day.

I want to thank all of our tourism professionals from around the state as well as our Maryland Tourism Development Board for all of their hard work and dedication. By working together, we can ensure that Maryland is truly open for business.

Sincerely,

LARRY HOGAN
Governor

Director's Message

DEAR TOURISM INDUSTRY PARTNERS:

Each year the Maryland Office of Tourism, a Division of the Maryland Department of Commerce, in conjunction with the Maryland Tourism Development Board report on the contributions that the travel and tourism industry made to the state's economy.

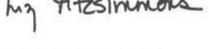
This year's Annual Report highlights the economic impact of Maryland's tourism industry from the recently released Economic Impact of Tourism in Maryland – Calendar Year 2018 Tourism Satellite Account report from Tourism Economics, a leading tourism industry research firm. They reported more than $18.1 billion in visitor spending and $2.5 billion in state and local taxes.

Another measurement highlighted in the Annual Report is the direct result of the passage of the Tourism Promotion Act of 2008 and its performance-based formula. Eight key tourism tax codes are tracked, reported and considered in calculating budgets. These FY 2019 Direct Tourism Taxes are also included in this report. The Board is also now mandated to submit a report, in cooperation with the Maryland Association of Destination Marketing Organizations (MDMO), on the effectiveness of mandatory funding and the passage of the Tourism Promotion Act in increasing visitor attendance and visitor spending in Maryland.

Economic Impact and visitation are generally reported by calendar year; all other metrics in the Annual Report are Fiscal Year 2019. While the results of a Tourism Satellite Account are available only on a delayed annual basis, many performance metrics, including the tourism tax codes, are available on a more frequent basis. The Office of Tourism Development distributes a monthly electronic *Tourism Monitor*, which reports trends and key performance metrics on a regular basis.

And so, pursuant to Section 5 of Chapter 471 Acts of 1997 (HB 685), I am pleased to present the Fiscal Year 2019 Tourism Development Board Annual Report. I am proud of the work of the Board and the Office of Tourism Development, and the positive impact that tourism has on our State.

Sincerely,



LIZ FITZSIMMONS
Executive Director
Maryland Tourism Development Board

HIGHLIGHTS FROM FISCAL YEAR 2019

A new branding and advertising campaign to market the state, increased non-paid media exposure and successful digital advertising campaigns were all part of the Office of Tourism's successes in FY19.

'OPEN FOR IT'

The Maryland Office of Tourism unveiled its newest advertising campaign, built around the tagline, "Maryland—Open For It." The campaign's tagline was developed to complement Commerce's "Open for Business" campaign. To accompany the launch, video and still photography were shot around the state at locations including Baltimore City, the Gunpowder River, Baltimore County, Harford County and Assateague. Television spots featuring the state's water-based and culinary experiences were developed to run in target markets including the New York metro area, Philadelphia, Harrisburg, Pittsburgh, Cleveland, Washington, D.C. and Baltimore. Print advertising in national and regional magazines, as well as companion radio, digital and social media campaigns, were also developed as part of the media mix. The "Open For It" campaign was developed by the Tourism Office's agency of record—Columbia, Maryland-based Marriner Marketing Communications.

DIGITAL ADVERTISING

In November 2018, the Maryland Office of Tourism launched "Home for the Holidays," a seven-week digital marketing campaign targeted to encourage visitors coming to Maryland for the holiday season to stay in a hotel rather than on the family couch or crowding into a childhood bedroom. Tourism partnered with the hotel community to develop special holiday overnight packages, which were listed on the VisitMaryland.org website and promoted through a quirky, fun, creative digital campaign. Hotel room bookings were tracked through Adara and TripAdvisor. Combined, for a total expenditure of $20K, 11,922 room nights were booked, for a total attributable revenue of $1,538,045. Also, the second annual "Summer of Music" promotion ran from May through September. A varied collection of multi-day music concerts and festivals around the state designed to encourage overnight stays, the "Summer of Music" was marketed through a dedicated digital campaign as well.

PUBLIC RELATIONS OUTREACH

The Communications/PR team took part in hosting several FAM tours with multiple tourism partners, bringing international journalists into Maryland for first-hand experiences around the state. Writers from the U.K. visited Frederick and Allegany counties, writers from Germany toured Wicomico and Worcester counties, writers from France experienced Baltimore and Annapolis and writers from Canada saw Chesapeake City, Havre de Grace, Rock Hall and Annapolis. Television appearances by OTD staff promoting the OC Air Show, various concerts that were part of the "Summer of Music," Maryland's water sports assets, historical sites that were part of the "Open For Time Travelers" promotion, the Crab & Oyster Trail, the Great Chesapeake Bay Loop and state parks. PR staff also accompanied a TV crew from Cleveland on a three-day taping tour of sites and attractions in Calvert County, including North Beach, Chesapeake Beach, Calvert Cliffs State Park and Solomons Island.

NATIONAL FOLK FESTIVAL

Salisbury welcomed the nation as the host city for the National Folk Festival in what was the first year of a three-year run in the Lower Eastern Shore town. The festival brought more than 350 artists to Maryland, ranging from musicians to dancers to craftspeople. The event took over the downtown area for three days with seven stages, a festival marketplace, food vendors and interactive booths. The festival attracted nearly 70,000 attendees, with an economic impact of more than $18 million in visitor spending.

Office Of Tourism Development Consumer Interactions

One of OTD's key goals is to inspire prospective visitors in specific markets to plan a trip to Maryland. Marketing activities are then developed with the objective of increasing web visits and quality leads from potential visitors. Consumer interactions across four channels—advertising, web activities, public relations and face-to-face customer interactions at Welcome Centers—are measured against this objective..

CUSTOMER INTERACTIONS

REQUEST TYPE	FY 2019	FY 2018	% CHANGE
OVERALL MARKETING BUDGET	$2.5m	$2.2m	14.5%
OVERALL ADVERTISING REQUESTS	33,187	45,327	-26.8%
TRAVEL MEDIA EXPOSURE (MILLIONS)	$18.8m	$7.7m	143.6%
WELCOME CENTER VISITATION	337,578	424,951	-20.6%
WEBSITE UNIQUE VISITORS (VISITMD.ORG ONLY)	2,809,580	2,808,065	0.1%
SOCIAL NETWORK FOLLOWERS	169,864	144,193	17.8%

** Google Analytics data*

PRIVATE SECTOR CONSUMER ADVERTISING DELIVERS A 5-TO-1 RETURN

In FY19, the MTDB awarded six Private Sector Consumer Advertising Partnership Program grants and two Open For It cross-cultural marketing grants collectively totaling $573,673. In turn these eight grants leveraged $1,051,873 in local match for a direct leverage ratio of $1:$1.80.

Annual OTD Marketing Plan Visitor Profile Or Situation Analysis

Maryland welcomed 40.6 million domestic travelers in 2018, a decrease of 2.4 percent according to a national survey of U.S. travelers conducted by D.K. Shifflet and Associates, a leading tourism industry research firm. For Maryland, the leisure segment represents nearly 85 percent of visitors or more than 34 million. Overnight travelers represent nearly 48 percent of the state's total visitation, or more than 19 million. In 2018, both the leisure and the overnight travel segments grew by 1.3 and 2.3 percent respectively. The bulk of Maryland's decline in visitor volume is attributed to a loss of travel from the business segment which at the national level also saw a decline of 0.2 percent.

VISITOR VOLUME ESTIMATES (Person-Trips in Millions)

	MARYLAND			US		
	2016	2017	2018	2016	2017	2018
TOTAL	42.10	41.52	40.57	2,706.93	2,814.00	2,886.47
BUSINESS	7.49	6.79	6.18	542.77	552.34	550.98
LEISURE	34.61	34.73	34.39	2,164.17	2,261.66	2,335.49
DAY	21.98	22.12	21.57	1,452.07	1,518.61	1,572.70
OVERNIGHT	20.12	19.40	19.00	1,254.87	1,295.39	1,313.77

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

MARYLAND DESTINATION REGIONS		SHARE OF MARYLAND VISITATION IN 2018
CENTRAL REGION	(ANNE ARUNDEL, BALTIMORE CITY, BALTIMORE, CARROLL, HARFORD, HOWARD)	52.5%
EASTERN SHORE	(CAROLINE, CECIL, DORCHESTER, KENT, QUEEN ANNE'S, SOMERSET, TALBOT, WICOMICO, WORCESTER)	20.6%
CAPITAL	(FREDERICK, MONTGOMERY, PRINCE GEORGE'S)	17.5%
WESTERN MARYLAND	(ALLEGANY, GARRETT, WASHINGTON)	6.5%
SOUTHERN	(CALVERT, CHARLES, ST. MARY'S)	2.9%

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

D.K. SHIFFLET DEFINES A VISITOR AS EITHER SOMEONE VISITING OVERNIGHT OR SOMEONE WHO TRAVELS 50 MILES OR MORE FROM THEIR HOME OUTSIDE OF THEIR DAILY ACTIVITY

Top Two Destinations

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

	MARYLAND	BALTIMORE	OCEAN CITY
ESTIMATED SHARE OF VISITS		36%	13%
ESTIMATED PERSON-STAYS (millions)	56.3	20.3	7.3
AVERAGE TRAVEL PARTY SIZE	1.8	1.7	2.8
AVERAGE LENGTH OF STAY	1.2	1	2.5
AVERAGE SPENDING PER PERSON PER DAY	$115.32	$141.08	$112.13
SPENDING IN MD PER TRAVEL PARTY	$249.10	$239.84	$784.88
TOP 3 DMAS OF ORIGIN			
WASHINGTON, D.C.	30%	23%	18%
BALTIMORE, MD	20%	18%	29%
PHILADELPHIA, PA	8%	10%	16%

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

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.

MARYLAND VISITOR ANALYSIS

Historically, women are the travel decision makers—if not the final decision makers. They generally determine which destinations are in the consideration set. Maryland's media buys are targeted to adults 25–64 but with a strong skew toward women; household income (HHI) $75,000+; well-educated and working in managerial and professional occupations. They have made a trip of more than one day's duration within the United States in the past 12 months, which includes 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.

DEMOGRAPHIC CHARACTERISTICS

DAY TRIP VS. OVERNIGHT - INDIVIDUAL

- Females make up the largest percentage of day visitors and males make up the largest percentage of overnight visitors.
- Visitors 50 – 64 make up 28 percent of all travelers and they represent the largest share of overnight trips.
- Visitors ages 18 – 49 make up 22 percent of overall visitors but they represent the largest share of day trips.
- More than half of all visitors (52 percent), are ages 50 or older and they represent more than half of all overnight trips (56 percent).

	DAY	OVERNIGHT
MALE	46%	53%
FEMALE	54%	47%
AGE		
18-34	28%	16%
35 - 49	23%	28%
50 - 64	23%	33%
65+	25%	23%

DAY TRIP VS. OVERNIGHT - FAMILIES

- A greater percentage of day trips (59 percent) are taken by couples or individuals traveling alone.
- More than half of overnight trips (51 percent) are taken by households with three or more members.
- Approximately 35 percent of households traveling to Maryland have children present and a greater percentage of them stay overnight.

HOUSEHOLD SIZE	DAY	OVERNIGHT
1 MEMBER	13%	10%
2 MEMBERS	46%	40%
3 MEMBERS	18%	21%
4 MEMBERS	14%	18%
5+ MEMBERS	9%	12%
CHILDREN PRESENT	30%	41%

DAY TRIP VS. OVERNIGHT - INCOME

Visitors to Maryland are affluent, with 28 percent of visitors having a household income of 150k or more. Households with an annual income greater than 75k make up 59 percent of visitors.

INCOME	DAY	OVERNIGHT
UNDER $50K	24%	27%
$50K-$74.9K	17%	14%
$75K-$99.9K	10%	15%
$100K-$149.9K	15%	23%
$150K+	34%	22%

DAY TRIP VS. OVERNIGHT - EMPLOYMENT TYPE

The majority of day and overnight trips (72 percent) are taken by married individuals.

EMPLOYMENT	DAY	OVERNIGHT
FULL TIME/SELF-EMPLOYED	63%	67%
NOT EMPLOYED/RETIRED	37%	33%

DAY TRIP VS. OVERNIGHT - EDUCATION

Visitors to Maryland are well educated. More than 26 percent of day and overnight visitors have at least a college degree. More than 74 percent of visitors have attended an institution of higher learning.

EDUCATIONAL ATTAINMENT	DAY	OVERNIGHT
H.S. GRADUATE	20%	21%
SOME COLLEGE	16%	26%
COLLEGE GRADUATE	27%	25%
POST-GRADUATE	34%	22%

DAY TRIP VS. OVERNIGHT - MARITAL STATUS

About 65 percent of day and overnight visitors are employed full-time or self-employed. Individuals who are not employed and/or retired took more day trips.

MARITAL STATUS	DAY	OVERNIGHT
MARRIED/WITH PARTNER	72%	71%
NEVER MARRIED	18%	15%
DIVORCED/WIDOWED	9%	14%

STATE OF ORIGIN

DAY TRIP VS. OVERNIGHT – STATE OF ORIGIN

- 89 percent of day-trippers come from Maryland and bordering states while 58 percent of overnight travelers come from these same states.
- Overnight travelers are a little more diversified with 20 percent coming from "longer" haul states such as New York, North Carolina and Florida

TOP 8	DAY	TOP 10	OVERNIGHT
MARYLAND	44%	MARYLAND	26%
VIRGINIA	21%	PENNSYLVANIA	13%
PENNSYLVANIA	12%	VIRGINIA	11%
DELAWARE	5%	NEW YORK	8%
WEST VIRGINIA	5%	NORTH CAROLINA	5%
NEW JERSEY	3%	NEW JERSEY	5%
WASHINGTON, D.C.	2%	TEXAS	3%
NEW YORK	2%	DELAWARE	3%
		WASHINGTON, D.C.	3%
		FLORIDA	3%

TOP 10 DMA OF ORIGIN

- A DMA 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. OTD is interested in visitor's DMA of origin for the purpose of targeting marketing and advertising efforts.
- The majority of day and overnight visitors are coming from the Washington, D.C. (Hagerstown, MD) DMA.
- The New York and Philadelphia DMAs are key feeder markets for overnight trips.

DAY TRIP VS. OVERNIGHT – DMA OF ORIGIN

DAY		OVERNIGHT	
Washington, D.C. (Hagerstown, MD)	43%	Washington, D.C. (Hagerstown, MD)	17%
Baltimore, MD	23%	Baltimore, MD	16%
Philadelphia, PA	8%	Philadelphia, PA	9%
New York, NY	4%	New York, NY	9%
Harrisburg-Lancaster-Lebanon-York, PA	4%	Richmond-Petersburg, VA	5%
Richmond-Petersburg, VA	4%	Harrisburg-Lancaster-Lebanon-York, PA	3%
Salisbury, MD	3%	Raleigh-Durham (Fayetteville), NC	2%
Johnstown-Altoona, PA	3%	Salisbury, MD	2%
Bluefield-Beckley-Oak Hill, WV	1%	Johnstown-Altoona, PA	2%
Gainesville, FL	1%	Pittsburgh, PA	2%

DMA VISITOR VOLUME

2017			2018		
	% of Visitors to MD	Total Visitor Number (Millions)		% of Visitors to MD	Total Visitor Number (Millions)
WASHINGTON, D.C.	28%	15.5	WASHINGTON, D.C.	30%	16.9
BALTIMORE, MD	19%	10.3	BALTIMORE, MD	20%	11.1
NEW YORK, NY	9%	5.0	NEW YORK, NY	6%	3.4
PHILADELPHIA, PA	8%	4.2	PHILADELPHIA, PA	8%	4.7
PITTSBURGH, PA	3%	1.9	PITTSBURGH, PA	1%	0.7

TIME FRAME OF TRAVEL

The majority of day trips occur in the spring from April to June while the majority of overnight trips occur during the summer from July to September

	DAY	OVERNIGHT
JANUARY–MARCH	17%	20%
APRIL–JUNE	36%	28%
JULY–SEPTEMBER	22%	33%
OCTOBER–DECEMBER	25%	19%

TOP 15 ACTIVITIES OF LEISURE TRAVELERS

- The top three activities for day and overnight travelers both are: visiting friend and relatives, culinary/dining experiences and shopping.
- Compared to day travelers, a greater percentage of overnight travelers engage in active outdoor/nature activities, which generally require a greater time commitment.

ACTIVITIES	DAY		OVERNIGHT
Visit Friends/Relatives	32%	Visit Friends/Relatives	29%
Shopping	18%	Culinary/Dining Experience	26%
Culinary/Dining Experience	17%	Shopping	18%
Beach/Waterfront	12%	Beach/Waterfront	17%
Historic Sites	10%	Nightlife	14%
Other Personal Celebrations and Gatherings	9%	Historic Sites	10%
Museum, Art Exhibits, etc.	8%	Live Music	8%
Nightlife	7%	Touring/Sightseeing	7%
Festival/Fairs	7%	Parks: National/State, etc.	7%
Gambling [slots, cards, horses, etc.]	7%	Gambling [slots, cards, horses, etc.]	7%
Touring/Sightseeing	7%	Museum, Art Exhibits, etc.	7%
Live Music	5%	Other Personal Celebrations and Gatherings	6%
Parks: National/State, etc.	5%	Festival/Fairs	6%
Zoo/Aquarium	5%	Amateur Sports	3%
Professional Sports Event	4%	Theme/Amusement/Water Park	3%

Tourism: A Revenue Generator

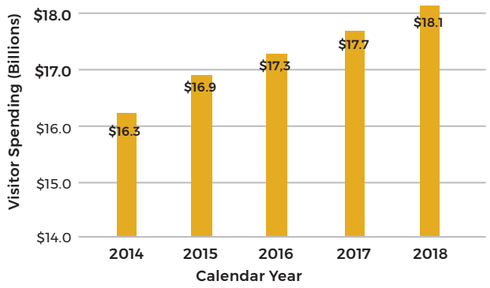
$18.1 BILLION IN VISITOR SPENDING

In calendar year 2018, visitor spending reached $18.1 billion, growing 2.1% and has increased more than 47% over 2009 results.

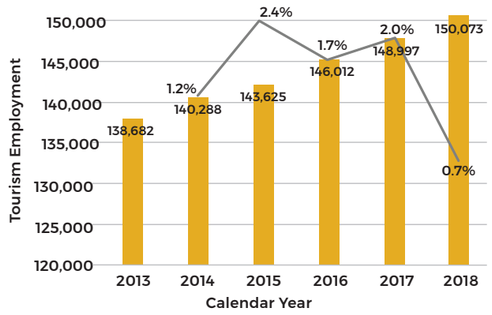
MORE THAN 150,000 DIRECT TOURISM JOBS

Tourism businesses employed more than 150,000 employees in 2018, growth of 1,000 jobs over 2017.

VISITOR SPENDING IN MARYLAND



TOURISM SUPPORTED EMPLOYMENT IN MARYLAND



TOURISM INDUSTRY SALES (MILLIONS)

SECTOR	2014	2015	2016	2017	2018	2018 GROWTH
LODGING	$3,039.4	$3,160.7	$3,350.7	$3,433.6	$3,431.7	-0.1%
F&B	$3,458.4	$3,673.6	$3,852.7	$4,014.2	$4,141.5	3.2%
RETAIL	$2.424.8	$2.401.0	$2,383.0	$2,370.4	$2,394.4	1.0%
RECREATION	$2,156.6	$2.251.9	$2,390.9	$2,372.6	$2,404.4	1.3%
TRANSPORTATION	$3,594.0	$3,682.4	$3,596.2	$3,682.7	$3,856.9	4.7%
AIR TRANSPORTATION	$1,636.1	$1,691.8	$1,749.3	$1,808.8	$1,821.4	0.7%
TOTAL	**$16,309.4**	**$16,861.4**	**$17,322.8**	**$17,682.3**	**$18,050.4**	**2.1%**

** Lodging includes 2nd home spending.*
Source: Tourism Economics, Maryland Tourism Satellite Account Calendar Year 2018.

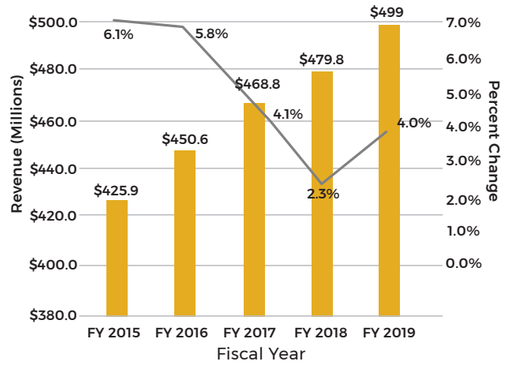
Tourism Sales Tax Revenues

OUTPERFORM OVERALL RETAIL SALES TAX COLLECTIONS

The passage of the Tourism Promotion Act of 2008 enacted the potential for enhanced funding appropriations based on the tourism sector's growth year over year. This funding formula provides a quantitative, policy-backed way to report the impact that visitor spending has on sales tax revenue in Maryland. Eight sales tax codes are tracked and multiplied by a tourism factor—the amount deemed attributable to visitor spending—by the Maryland Comptroller. The Board qualifies for additional funding if this tourism tax increment exceeds three percent of the tourism tax revenues from the previous year.

The Bureau of Revenue Estimates reported adjusted tourism expenditures of $499 million, an increase of 4.0 percent over FY 2018. The total revenues for all categories amounted to more than $1.3 billion.

TOURISM SALES & USE TAX REVENUE FY 2015 TO 2019



Source: MD Comptroller

SALES TAX CODE & CATEGORY (MILLIONS)	TOTAL FY 2018	TOTAL FY 2019	FACTOR	ADJUSTED FY 2018	ADJUSTED FY 2019	% CHANGE
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	$410.9	$432.1	33%	$137.0	$144.0	5.2%
111 Hotels, Motels Selling Food - W/BWL	$37.8	$35.5	100%	$37.8	$35.5	-6.2%
112 Restaurants and Nite Clubs - W/BWL	$280.1	$286.2	33%	$93.4	$95.4	2.2%
306 General Merchandise	$317.3	$366.6	5%	$15.9	$18.3	15.6%
407 Automobile, Bus and Truck Rentals	$73.4	$80.4	90%	$66.0	$72.4	9.6%
706 Airlines - Commercial	$0.4	$0.3	50%	$0.2	$0.2	-19.3%
901 Hotels, Motels, Apartments, Cottages	$125.0	$128.6	100%	$125.0	$128.6	2.9%
925 Recreation and Amusement Places	$9.1	$9.2	50%	$4.5	$4.6	1.1%
Tourism Tax Categories Subtotal	$1,253.9	$1,338.9		$479.8	$499.0	4.0%

VISITATION TO MARYLAND

Visitation decrease attributable to drop in business travel.

CY 2018 VISITOR VOLUME (% CHANGE FROM 2017)

	US	MD	DC	DE	PA	VA	WVA
TOTAL	3.3%	3.2%	5.2%	4.1%	1.0%	3.3%	1.0%
BUSINESS	0.9%	-2.9%	0.9%	5.6%	0.9%	2.6%	-2.2%
LEISURE	3.9%	4.7%	8.1%	3.8%	1.0%	3.5%	1.6%
DAY	4.0%	2.9%	-	-	0.7%	4.9%	1.4%
OVERNIGHT	2.6%	3.5%	3.7%	4.1%	1.4%	1.9%	0.6%

Source: DK Shifflet and Associates, Visitor Volume Calendar Year 2018.

$18.1 BILLION IN VISTOR SPENDING

In calendar year 2018 visitor spending reached $18.1 billion, growing 2.1%. It has increased more than 47% over 2009 results.

Visitor spending increased by $370 million in 2018 to reach $18.1 billion; spending is up by nearly $5.8 billion since 2009.

Calendar Year 2018 Analysis

SEGMENT	ROOM DEMAND % CHANGE	ROOM SUPPLY % CHANGE	ROOM REVENUE % CHANGE	AVERAGE ROOM RATE ($)	ROOM RATE % CHANGE	OCCUPANCY RATE	OCCUPANCY % CHANGE	ROOMS SAMPLED
UNITED STATES	2.5	2.0	5.0	129.83	2.4	66.2	0.5	3,934,397
DC-MD-VA-DE REGION+	0.9	1.4	0.2	128.91	-0.7	66.3	-0.5	318,532
MARYLAND	-0.1	2.0	-0.1	121.53	0.0	64.1	-2.1	68,622
MD COUNTIES								
ALLEGANY COUNTY	7.1	4.6	6.5	91.73	-0.6	58.8	2.4	1,142
ANNE ARUNDEL COUNTY	0.9	1.2	1.7	107.29	0.7	71.6	-0.3	10,302
BALTIMORE COUNTY	0.0	1.9	-1.5	94.85	-1.6	62.7	-1.8	5,598
BALTIMORE CITY	-0.6	5.7	-3.6	155.05	-3.0	62.7	-6.0	9,136
CALVERT COUNTY	-12.4	0.0	-6.7	105.42	6.5	57.4	-12.4	699
CECIL COUNTY	-2.9	0.7	-0.1	86.27	3.0	57.2	-3.7	770
CHARLES COUNTY	-5.3	-0.5	-6.7	96.04	-1.5	63.7	-4.8	975
DORCHESTER COUNTY	4.3	0.0	1.3	160.72	-2.9	53.9	4.3	600
FREDERICK COUNTY	-0.2	2.7	0.2	90.50	0.4	64.2	-2.8	2,589
HARFORD COUNTY	3.2	4.6	2.4	91.16	-0.7	61.4	-1.4	2,580
HOWARD COUNTY	2.1	-0.1	3.1	97.04	0.9	68.9	2.2	3,299
MONTGOMERY COUNTY	-1.3	-0.5	-1.5	131.06	-0.2	67.9	-0.9	9,326
PRINCE GEORGE`S COUNTY	-0.5	1.6	-0.1	133.00	0.3	66.3	-2.0	11,005
QUEEN ANNE`S COUNTY	-1.1	0.0	-4.1	146.67	-3.0	51.2	-1.1	371
ST MARY`S COUNTY	-12.1	-2.8	-10.2	91.07	2.2	62.9	-9.6	1,065
TALBOT COUNTY	-2.0	-1.1	3.6	173.29	5.7	51.9	-0.9	674
WASHINGTON COUNTY	5.1	0.5	7.6	82.49	2.4	62.7	4.6	1,842
WICOMICO COUNTY	-3.3	0.0	-0.8	99.71	2.6	55.7	-3.3	1,235
WORCESTER COUNTY	-1.1	3.5	1.3	162.85	2.4	57.4	-4.4	3,990
MD REGIONS								
WESTERN REGION+	5.6	1.7	6.8	86.10	1.1	60.3	3.9	3,150
CAPITAL REGION+	-0.8	0.9	-0.7	127.60	0.1	66.7	-1.6	22,920
CENTRAL REGION+	1.3	3.2	0.1	114.58	-1.1	66.0	-1.9	31,927
SOUTHERN REGION+	-9.6	-1.3	-8.0	96.28	1.8	61.9	-8.4	2,739
UPPER EASTERN SHORE+	-1.1	-0.1	1.0	134.82	2.1	53.7	-1.0	2,609
LOWER EASTERN SHORE+	-1.6	2.8	1.0	152.11	2.6	56.9	-4.3	5,277

Source: Smith Travel Research, Inc.; County data unavailable due to small sample sizes in Caroline, Carroll, Garrett, Kent and Somerset counties. Data for these counties is included in their respective regions.

Fiscal Year 2019 Direct Tourism Taxes and MTDB Grant Awards

Across the state, county to county, no matter the region, visitor spending makes a significant impact. The following chart details how tourism supported the tax base in Maryland's 23 counties and Baltimore City, broken out by geographic region and the state's MTDB investment in local marketing plans.

COUNTIES	ADMISSION AND AMUSEMENT TAXES	ROOM TAXES COLLECTED BY THE COUNTY	TOURISM PROMOTION ACT SALES TAXES*	TOTAL DIRECT CONSUMER TAX IMPACT	COUNTY TOURISM BUDGET	TOURISM DEVELOPMENT BOARD GRANT AWARDED
ALLEGANY	$287,174	$1,093,136	$5,118,797	$6,499,107	$612,000	$28,072
GARRETT	$1,088,766	$3,093,760	$4,081,872	$8,264,398	$1,360,000	$73,372
WASHINGTON	$693,748	$2,259,680	$7,341,539	$10,294,967	$1,277,150	$87,847
WESTERN REGION	**$2,069,688**	**$6,446,576**	**$16,542,208**	**$25,058,472**	**$3,249,150**	**$189,291**
FREDERICK	$578,853	$2,506,978	$14,111,096	$17,196,927	$1,837,851	$225,589
MONTGOMERY	$6,220,141	$116,867	$78,240,274	$84,577,282	$1,871,519	$87,365
PRINCE GEORGE'S	$17,891,137	$33,062,861	$74,160,698	$125,114,696	$1,388,200	$350,464
CAPITOL REGION	**$24,690,131**	**$35,686,706**	**$166,512,067**	**$226,888,904**	**$5,097,570**	**$663,418**
ANNE ARUNDEL	$7,466,104	$20,414,062	$72,863,603	$100,743,769	$3,777,259	$155,542
BALTIMORE CITY	$8,527,323	$33,016,707	$53,168,769	$94,712,799	$16,468,640	$362,777
BALTIMORE COUNTY	$6,298,845	$9,923,401	$49,560,458	$65,782,704	$30,000	$24,475
CARROLL	$652,457	$339,686	$6,590,657	$7,582,801	$417,570	$51,045
HARFORD	$1,010,086	$3,097,307	$12,710,303	$13,720,389	$595,000	$72,944
HOWARD	$3,476,665	$5,358,425	$20,168,952	$29,004,042	$1,047,377	$48,350
CENTRAL REGION	**$27,431,480**	**$69,052,281**	**$215,062,743**	**$311,546,504**	**$22,335,846**	**$715,133**
CALVERT	$968,351	$743,849	$4,589,542	$6,301,742	$460,673	$42,728
CHARLES	$921,337	$1,185,403	$7,117,670	$9,224,410	$820,830	$32,775
ST. MARY'S	$159,082	$1,053,142.00	$5,715,547	$5,874,629	$430,936	$23,832
SOUTHERN REGION	**$2,048,770**	**$1,929,253**	**$17,422,759**	**$21,400,782**	**$1,712,439**	**$99,335**
CAROLINE	$2,492	$38,656	$1,553,733	$1,594,881	$110,000	$20,468
CECIL	$134,866	$899,706	$4,816,657	$5,851,229	$397,450	$38,305
DORCHESTER	$82,401	$348,544	$3,107,481	$3,538,426	$372,500	$58,879
KENT	$52,565	$312,685	$1,068,820	$1,434,070	$367,482	$47,728
QUEEN ANNE'S	$168,220	$649,625	$3,470,037	$4,287,882	$418,239	$30,155
SOMERSET	$17,844	$82,826	$451,559	$552,229	$310,156	$21,632
TALBOT	$140,527	$1,432,228	$4,028,401	$5,601,156	$584,895	$59,152
WICOMICO	$593,797	$1,017,728	$6,793,595	$8,405,120	$1,220,707	$42,675
WORCESTER	$2,277,841	$1,062,884	$29,174,932	$32,515,657	$982,571	$140,607
OCEAN CITY		$16,191,326		$16,191,326	$6,925,630	$373,225
EASTERN SHORE	**$3,470,553**	**$22,036,208**	**$54,465,214**	**$63,780,649**	**$11,689,630**	**$832,826**
STADIUM AUTHORITY	$9,089,758					
TOTAL DIRECT CONSUMER TAXES	**$68,800,380**	**$135,151,023**	**$470,004,992**	**$648,675,311**	**$44,084,634**	**$2,500,003**

**COMPTROLLER DESIGNATED TOURISM TAXES*

TOURISM IN MARYLAND GENERATED $2.5 BILLION IN TAXES IN 2018

Maryland
DEPARTMENT OF COMMERCE
OFFICE OF TOURISM

PUBLISHED BY THE MARYLAND DEPARTMENT OF COMMERCE

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