2018 TOURISM MARKETING AND DEVELOPMENT PLAN
MARYLAND TOURISM DEVELOPMENT BOARD AND THE OFFICE OF TOURISM DEVELOPMENT
# 2018 Tourism Marketing and Development Plan

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Cover: Choptank River Lighthouse, Photo by Jill Jasuta
DEAR TOURISM PARTNER: As Chair of the Maryland Tourism Development Board, I want to thank you for the hard work you do every day to provide a positive Maryland tourism experience for our customers. Our industry is a powerful economic engine and job generator, employing more than 144,000 Marylanders as the 10th largest private sector employer in the state.

Tourism generates and continues to grow significant revenue that is integral to Maryland’s economic vitality. In 2015, visitors to Maryland spent $17 billion on travel, an increase of more than 4 percent over the previous year. That visitor spending is an important revenue generator for both state and local governments, generating $2.2 billion in taxes in 2015.

That increase in revenues is driven by the fact that Maryland welcomed 42.1 million domestic visitors in 2016, an increase of 4 percent from 40.5 million from the previous year.

As president of the largest theme park in Maryland, I know the importance of the visitor-driven economy, as do my 2,500 employees. Employees in tourism-related jobs around the state earned $5.7 billion in wages—an overall wage increase of 6 percent over 2014. With Governor Hogan’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 roadmap 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 the Appalachian Maryland initiative, commemorating the Frederick Douglass bicentennial, Maryland Fleet Week & Air Show Baltimore 2018, the 50th anniversary of the Maryland State Arts Council, and hosting the Student & Youth Travel Association’s annual national convention in Baltimore.

These, and many other featured activities, all help to advance Maryland’s image as an exciting, must-see destination offering lots to do.

I am proud of this Board’s continuing work with the Office of Tourism, and am pleased to present the Fiscal Year 2018 Tourism Marketing and Development Plan. The objectives and strategies in this plan are designed to enhance tourism’s positive impact.

I know I speak for the Board when I say we look forward to working with you, our tourism industry partners, to continue to increase Maryland’s tourism expenditures, tax revenues and job opportunities.

Sincerely,

Rick Howarth
Chair, Maryland Tourism Development Board
President, Six Flags America

Rick Howarth, President, Six Flags America, with his two wonder women—Wonder Woman and his daughter, Kate.
02 Destination Situation Analysis
MARKETING AND DEVELOPMENT PLAN

Destination Situation Analysis

For calendar year 2016, D.K. Shifflet & Associates reports that Maryland hosted more than 42 million estimated domestic visitors, up 4 percent from 2015, the U.S and regional competitors. Eighty-two percent, or more than 34.6 million, were leisure visitors, and the remaining 17.8 percent, or close to 7.5 million, were business travelers. Of these leisure visitors, 52 percent took a day trip and close to 48 percent stayed overnight.

Visitor Volume Estimates (Person-Trips in Millions)

<table>
<thead>
<tr>
<th></th>
<th>MARYLAND</th>
<th>UNITED STATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>38.23</td>
<td>40.47</td>
</tr>
<tr>
<td>BUSINESS</td>
<td>7.15</td>
<td>7.56</td>
</tr>
<tr>
<td>LEISURE</td>
<td>31.09</td>
<td>32.92</td>
</tr>
<tr>
<td>DAY</td>
<td>19.38</td>
<td>20.98</td>
</tr>
<tr>
<td>OVERNIGHT</td>
<td>18.85</td>
<td>19.49</td>
</tr>
</tbody>
</table>

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.

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

MARYLAND DESTINATION REGIONS

<table>
<thead>
<tr>
<th>REGION</th>
<th>VISITATION IN 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>CENTRAL REGION</td>
<td>51.3%</td>
</tr>
<tr>
<td>EASTERN SHORE</td>
<td>23.4%</td>
</tr>
<tr>
<td>CAPITAL</td>
<td>17.0%</td>
</tr>
<tr>
<td>WESTERN MARYLAND</td>
<td>5.0%</td>
</tr>
<tr>
<td>SOUTHERN</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

Source: D.K. Shifflet & Associates, Ltd. with independent analysis by the Maryland Office of Tourism based on person-stays
Maryland outpaces national percent change increase in visitor volume

TRENDS AND COMPARISONS

National domestic travel volume increased in 2016, with total domestic U.S. visitor volume, as measured in person-trips, growing 2.6 percent from 2015. Leisure travel represented more than 79 percent of all person-trips, with day trips representing 53.6 percent and overnight 46.4 percent of visitor volume.

Growth in visitor volume to Maryland surpassed domestic U.S growth in all of the travel segments except business. Maryland’s year over year growth also outperformed Pennsylvania’s in all travel segments except business. Maryland’s growth in the leisure travel segment outperformed both Pennsylvania’s and Virginia’s leisure visitation.

<table>
<thead>
<tr>
<th>TRAVEL SEGMENT</th>
<th>US</th>
<th>MD</th>
<th>D.C.</th>
<th>DE</th>
<th>PA</th>
<th>VA</th>
<th>VA</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>2.6%</td>
<td>4.0%</td>
<td>11.7%</td>
<td>6.0%</td>
<td>0.7%</td>
<td>7.0%</td>
<td>-11.6%</td>
</tr>
<tr>
<td>BUSINESS</td>
<td>1.0%</td>
<td>-0.8%</td>
<td>5.6%</td>
<td>-1.8%</td>
<td>1.4%</td>
<td>14.4%</td>
<td>-21.4%</td>
</tr>
<tr>
<td>LEISURE</td>
<td>3.1%</td>
<td>5.1%</td>
<td>15.2%</td>
<td>7.9%</td>
<td>-1.1%</td>
<td>4.8%</td>
<td>-9.4%</td>
</tr>
<tr>
<td>DAY</td>
<td>3.1%</td>
<td>4.8%</td>
<td>20.8%</td>
<td>-0.9%</td>
<td>9.5%</td>
<td>-11.5%</td>
<td></td>
</tr>
<tr>
<td>OVERNIGHT</td>
<td>2.2%</td>
<td>3.2%</td>
<td>7.0%</td>
<td>1.5%</td>
<td>-0.4%</td>
<td>4.8%</td>
<td>-11.7%</td>
</tr>
</tbody>
</table>

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

TOP TWO DESTINATIONS

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

<table>
<thead>
<tr>
<th>ESTIMATED SHARE OF VISITS</th>
<th>MARYLAND</th>
<th>BALTIMORE</th>
<th>OCEAN CITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>53.2 million</td>
<td>30.6%</td>
<td>15.1%</td>
<td></td>
</tr>
<tr>
<td>16.3 million</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.9</td>
<td>1.7</td>
<td>2.3</td>
<td></td>
</tr>
<tr>
<td>1.4</td>
<td>1.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$112.3</td>
<td>$125.8</td>
<td>$121.9</td>
<td></td>
</tr>
<tr>
<td>$310.51</td>
<td>$249.85</td>
<td>$764.89</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOP 3 DMAS OF ORIGIN</th>
<th>MARYLAND</th>
<th>BALTIMORE</th>
<th>OCEAN CITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Washington, D.C.</td>
<td>21.6%</td>
<td>21.0%</td>
<td>27.8%</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>19.9%</td>
<td>16.8%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>9.7%</td>
<td>10.7%</td>
<td>16.1%</td>
</tr>
</tbody>
</table>

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

The lodging sector is an important barometer of the health of the Maryland tourism industry. The Office of Tourism receives information from STR, Inc., a leading lodging industry research firm, to provide monthly, bi-annual and annual lodging data for the State of Maryland and its counties. This data provides a level of detail that allows for nearly complete coverage of the State.

THE FOLLOWING LODGING MEASUREMENTS ARE DETAILED BELOW:

- Room Demand – reflects the percentage change in the number of rooms sold
- Room Supply – reflects the percentage change in the number of rooms available
- Room Rates – reflects the average cost per room
- Room Revenue – reflects the percentage change in the amount of revenue collected

Maryland Lodging Monitor (CHART ON NEXT PAGE)

The Maryland Office of Tourism’s bi-annual report on Maryland lodging data supplied by STR, Inc.


Lodging room demand statewide increased 3.7 percent, compared to the same twelve month period in 2015. Maryland’s demand is slightly above the region’s 3.5 percent and more than double the nation’s growth. The number of rooms available (room supply) across the state increased 1.3 percent, region (0.9 percent), and nation (1.6 percent).

The average room rate for Maryland was $119.39 – lower than the nation’s $123.97 rate and lower than the regional rate of $125.92. Total room revenue for the state increased 5.2 percent compared to the same twelve-month period in 2015. Occupancy rates, which reflect changes in supply and demand for rooms, averaged 65.9 percent, nearly 2 percent more than last year. The national occupancy rate was 65.5 percent, and the region’s occupancy rate was 66.5 percent.
# CALENDAR YEAR 2016 ANALYSIS

<table>
<thead>
<tr>
<th>Segment</th>
<th>Room Demand % Change</th>
<th>Room Supply % Change</th>
<th>Room Revenue % Change</th>
<th>Average Room Rate ($)</th>
<th>Room Rate % Change</th>
<th>Occupancy Rate</th>
<th>Occupancy % Change</th>
<th>Number of Rooms Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>1.7</td>
<td>1.6</td>
<td>4.8</td>
<td>123.97</td>
<td>3.1</td>
<td>65.5</td>
<td>0.1</td>
<td>3.7M</td>
</tr>
<tr>
<td>D.C.-MD-VA-DE Region</td>
<td>3.5</td>
<td>0.9</td>
<td>6.0</td>
<td>125.92</td>
<td>2.4</td>
<td>66.5</td>
<td>2.6</td>
<td>308,176</td>
</tr>
<tr>
<td>Maryland</td>
<td>3.7</td>
<td>1.3</td>
<td>5.2</td>
<td>119.39</td>
<td>1.5</td>
<td>65.9</td>
<td>2.3</td>
<td>66,633</td>
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</tbody>
</table>

**MD Counties**

<table>
<thead>
<tr>
<th>County</th>
<th>Room Demand % Change</th>
<th>Room Supply % Change</th>
<th>Room Revenue % Change</th>
<th>Average Room Rate ($)</th>
<th>Room Rate % Change</th>
<th>Occupancy Rate</th>
<th>Occupancy % Change</th>
<th>Number of Rooms Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baltimore City</td>
<td>-1.1</td>
<td>3.0</td>
<td>-2.0</td>
<td>159.99</td>
<td>-0.9</td>
<td>65.7</td>
<td>-4.0</td>
<td>8,471</td>
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<tr>
<td>Allegany</td>
<td>4.5</td>
<td>8.8</td>
<td>4.9</td>
<td>91.45</td>
<td>0.4</td>
<td>60.6</td>
<td>-3.9</td>
<td>1,064</td>
</tr>
<tr>
<td>Anne Arundel</td>
<td>1.4</td>
<td>0.7</td>
<td>2.0</td>
<td>104.92</td>
<td>0.6</td>
<td>72.2</td>
<td>0.7</td>
<td>9,969</td>
</tr>
<tr>
<td>Baltimore</td>
<td>3.4</td>
<td>1.4</td>
<td>6.1</td>
<td>96.92</td>
<td>2.6</td>
<td>65.5</td>
<td>1.9</td>
<td>5,767</td>
</tr>
<tr>
<td>Calvert</td>
<td>7.4</td>
<td>0.0</td>
<td>6.1</td>
<td>97.43</td>
<td>-1.2</td>
<td>60.2</td>
<td>7.4</td>
<td>700</td>
</tr>
<tr>
<td>Cecil</td>
<td>2.9</td>
<td>0.0</td>
<td>4.3</td>
<td>84.25</td>
<td>1.3</td>
<td>61.6</td>
<td>2.9</td>
<td>870</td>
</tr>
<tr>
<td>Charles</td>
<td>4.6</td>
<td>0.2</td>
<td>11.7</td>
<td>92.52</td>
<td>6.8</td>
<td>71.1</td>
<td>4.3</td>
<td>975</td>
</tr>
<tr>
<td>Dorchester</td>
<td>2.0</td>
<td>0.0</td>
<td>2.4</td>
<td>163.38</td>
<td>0.4</td>
<td>54.2</td>
<td>2.0</td>
<td>600</td>
</tr>
<tr>
<td>Frederick</td>
<td>10.5</td>
<td>7.9</td>
<td>7.9</td>
<td>87.65</td>
<td>-2.3</td>
<td>65.0</td>
<td>2.3</td>
<td>2,464</td>
</tr>
<tr>
<td>Harford</td>
<td>-3.4</td>
<td>-2.0</td>
<td>-2.5</td>
<td>91.08</td>
<td>0.9</td>
<td>64.0</td>
<td>-1.4</td>
<td>2,439</td>
</tr>
<tr>
<td>Howard</td>
<td>1.5</td>
<td>1.8</td>
<td>1.1</td>
<td>95.47</td>
<td>-0.5</td>
<td>66.0</td>
<td>-0.3</td>
<td>3,322</td>
</tr>
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<td>Montgomery</td>
<td>2.0</td>
<td>-1.2</td>
<td>4.4</td>
<td>129.14</td>
<td>2.4</td>
<td>67.8</td>
<td>3.2</td>
<td>9,601</td>
</tr>
<tr>
<td>Prince George’s</td>
<td>6.0</td>
<td>2.7</td>
<td>9.9</td>
<td>128.74</td>
<td>3.7</td>
<td>69.3</td>
<td>3.2</td>
<td>10,236</td>
</tr>
<tr>
<td>Queen Anne’s</td>
<td>14.0</td>
<td>9.4</td>
<td>16.8</td>
<td>134.25</td>
<td>2.5</td>
<td>53.4</td>
<td>4.2</td>
<td>371</td>
</tr>
<tr>
<td>St Mary’s</td>
<td>26.1</td>
<td>6.6</td>
<td>19.4</td>
<td>82.86</td>
<td>-5.3</td>
<td>68.7</td>
<td>18.3</td>
<td>999</td>
</tr>
<tr>
<td>Talbot</td>
<td>13.6</td>
<td>7.3</td>
<td>9.6</td>
<td>159.50</td>
<td>-3.5</td>
<td>50.3</td>
<td>5.9</td>
<td>787</td>
</tr>
<tr>
<td>Washington</td>
<td>0.9</td>
<td>0.2</td>
<td>0.9</td>
<td>76.41</td>
<td>-0.1</td>
<td>61.1</td>
<td>0.8</td>
<td>1,928</td>
</tr>
<tr>
<td>Wicomico</td>
<td>8.3</td>
<td>0.0</td>
<td>10.0</td>
<td>95.33</td>
<td>1.6</td>
<td>57.9</td>
<td>8.2</td>
<td>1,235</td>
</tr>
<tr>
<td>Worcester</td>
<td>4.2</td>
<td>1.2</td>
<td>5.2</td>
<td>154.89</td>
<td>1.0</td>
<td>59.5</td>
<td>2.9</td>
<td>3,720</td>
</tr>
</tbody>
</table>

**MD Regions**

<table>
<thead>
<tr>
<th>Region</th>
<th>Room Demand % Change</th>
<th>Room Supply % Change</th>
<th>Room Revenue % Change</th>
<th>Average Room Rate ($)</th>
<th>Room Rate % Change</th>
<th>Occupancy Rate</th>
<th>Occupancy % Change</th>
<th>Number of Rooms Sampled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Region</td>
<td>1.9</td>
<td>2.6</td>
<td>1.9</td>
<td>82.37</td>
<td>0.1</td>
<td>59.9</td>
<td>-0.7</td>
<td>3,163</td>
</tr>
<tr>
<td>Capital Region</td>
<td>4.7</td>
<td>1.5</td>
<td>7.3</td>
<td>124.52</td>
<td>2.5</td>
<td>68.2</td>
<td>3.1</td>
<td>22,301</td>
</tr>
<tr>
<td>Central Region</td>
<td>1.9</td>
<td>0.8</td>
<td>3.1</td>
<td>115.48</td>
<td>1.3</td>
<td>68.0</td>
<td>1.0</td>
<td>30,666</td>
</tr>
<tr>
<td>Southern Region</td>
<td>12.3</td>
<td>2.4</td>
<td>12.8</td>
<td>89.94</td>
<td>0.5</td>
<td>67.7</td>
<td>9.7</td>
<td>2,674</td>
</tr>
<tr>
<td>Upper Eastern Shore</td>
<td>7.2</td>
<td>3.3</td>
<td>7.3</td>
<td>127.73</td>
<td>0.0</td>
<td>55.0</td>
<td>3.8</td>
<td>2,822</td>
</tr>
<tr>
<td>Lower Eastern Shore</td>
<td>4.8</td>
<td>1.0</td>
<td>5.7</td>
<td>144.05</td>
<td>0.8</td>
<td>59.0</td>
<td>3.8</td>
<td>5,007</td>
</tr>
</tbody>
</table>

*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.*
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 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.

COMPETITIVE ANALYSIS
The U.S. Travel Association announced that in 2016, tourism in the United States generated more than $990.3 billion in visitor spending, 4.6 percent more than in 2015. In the race for consumer travel dollars, it is estimated that states invested more than $883 million in travel marketing offices in FY 2015. For FY 2015, the U.S. Travel Association reported that Maryland’s tourism budget was $10.5 million. In comparison, states that compete most heavily with Maryland, such as Virginia, had a budget of more than $18.8 million.
Maryland Visitor Analysis

TRAVEL DECISION MAKER/TARGET AUDIENCE DEFINITIONS
Historically, women are the travel decision makers — if not the final decision makers. They generally determine the destinations in the consideration set. Maryland’s media buys are targeted to adults 25–64 but with a strong skew to 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 more nights away from home.

DEMOGRAPHIC CHARACTERISTICS

- Males make up 51 percent of day visitors while females make up 51 percent of overnight visitors.
- 50 percent of day travelers are over 49 years of age compared 55 percent of overnight travelers.

<table>
<thead>
<tr>
<th>AGE</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE</td>
<td>51%</td>
<td>49%</td>
</tr>
<tr>
<td>FEMALE</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>18 - 34</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>35 - 49</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>50 - 64</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>65+</td>
<td>16%</td>
<td>18%</td>
</tr>
</tbody>
</table>

- The family composition of a day and overnight trips are fairly similar. A greater percentage of overnight travelers have a household size of 3 or more.
- Approximately 31 percent of families travel overnight with children under 18.

<table>
<thead>
<tr>
<th>HOUSEHOLD SIZE</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 MEMBER</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>2 MEMBERS</td>
<td>42%</td>
<td>44%</td>
</tr>
<tr>
<td>3 MEMBERS</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>4 MEMBERS</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>5+ CHILDREN</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>PRESENT</td>
<td>26%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Source: D.K. Shifflet and Associates, Ltd., with independent analysis by the Maryland Office of Tourism
More than 50 percent of day and overnight visitors have household incomes of $75,000 and above. The majority of day and overnight trips are taken by married individuals.

<table>
<thead>
<tr>
<th>INCOME</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNDER $50K</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>$50K–$74.9K</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>$75K–$99.9K</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>$100K–$149.9K</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>$150K+</td>
<td>21%</td>
<td>22%</td>
</tr>
</tbody>
</table>

More than 65 percent of day and overnight visitors are employed full-time or self-employed. More day-trippers are not employed full-time — possibly leading to more opportunities to take day trips.

<table>
<thead>
<tr>
<th>MARITAL STATUS</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARRIED/WITH PARTNER</td>
<td>62%</td>
<td>70%</td>
</tr>
<tr>
<td>NEVER MARRIED</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>DIVORCED/WIDOWED</td>
<td>15%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Visitors to Maryland are well educated, more than 50 percent of day and overnight visitors have at least a college degree. More than 70 percent of day and overnight visitors have attended some college.

<table>
<thead>
<tr>
<th>EDUCATIONAL ATTAINMENT</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIGH SCHOOL OR LESS</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>SOME COLLEGE</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>COLLEGE GRADUATE</td>
<td>28%</td>
<td>34%</td>
</tr>
<tr>
<td>POST-GRADUATE</td>
<td>21%</td>
<td>22%</td>
</tr>
</tbody>
</table>

More than 65 percent of day and overnight visitors are employed full-time or self-employed. More day-trippers are not employed full-time — possibly leading to more opportunities to take day trips.

<table>
<thead>
<tr>
<th>EMPLOYMENT</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>FULL TIME/SELF-EMPLOYED</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>NOT EMPLOYED/RETIRED</td>
<td>30%</td>
<td>28%</td>
</tr>
</tbody>
</table>

85 percent of day travelers come from Maryland and bordering states while only 40 percent of overnight travelers come from these same states.

State of Origin

- Overnight travelers are a little more diversified with 19 percent coming from “longer” haul states such as, Florida, North Carolina, Texas, and Ohio

This information identifies those markets where Maryland can invest its promotional and advertising efforts to deliver greater economic impact as a result of increased length of stay and greater spending.

<table>
<thead>
<tr>
<th>STATE OF ORIGIN</th>
<th>DAY</th>
<th>OVERNIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARYLAND</td>
<td>53%</td>
<td>18%</td>
</tr>
<tr>
<td>PENNSYLVANIA</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>VIRGINIA</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>DELAWARE</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>NEW YORK</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>NEW JERSEY</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>TEXAS</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>FLORIDA</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>OHIO</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

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

- DMA region is a group of counties that form a 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. DMA.

- The Philadelphia and NY/NJ/PA/CT DMAs are feeder markets for overnight trips.

### DMA OF ORIGIN – VISITOR VOLUME

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>% OF VISITORS TO MD</td>
<td>TOTAL VISITORS (millions)</td>
<td>% OF VISITORS TO MD</td>
<td>TOTAL VISITORS (millions)</td>
<td></td>
</tr>
<tr>
<td>Washington, D.C.</td>
<td>23.2%</td>
<td>11.9</td>
<td>Washington, DC</td>
<td>21.6%</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>20.6%</td>
<td>10.6</td>
<td>Baltimore, MD</td>
<td>19.9%</td>
</tr>
<tr>
<td>New York, NY</td>
<td>12.1%</td>
<td>6.1</td>
<td>Philadelphia, PA</td>
<td>9.7%</td>
</tr>
<tr>
<td>Pittsburgh, PA</td>
<td>2.5%</td>
<td>1.3</td>
<td>Pittsburgh, PA</td>
<td>2.7%</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>8.7%</td>
<td>4.5</td>
<td>New York, NY</td>
<td>7.1%</td>
</tr>
</tbody>
</table>

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

Maryland saw increases in visitation from Pennsylvania feeder markets.
WHEN PEOPLE TRAVEL

<table>
<thead>
<tr>
<th>Period</th>
<th>Day</th>
<th>Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>JANUARY–MARCH</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>APRIL–JUNE</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>JULY–SEPTEMBER</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>OCTOBER–DECEMBER</td>
<td>24%</td>
<td>21%</td>
</tr>
</tbody>
</table>

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

TOP 10 ACTIVITIES OF LEISURE TRAVELERS

- Day and overnight travelers both participate in shopping and dining activities.
- Compared to day travelers, a greater percentage of overnight travelers engage in active outdoor/nature activities which generally require a greater time commitment.

ACCOMMODATIONS AND MODE OF TRANSPORTATION FOR ALL MD OVERNIGHT TRAVELERS

<table>
<thead>
<tr>
<th>Accommodations and Mode of Transportation</th>
<th>Day</th>
<th>Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>STANDARD HOTEL (NOT RESORT)</td>
<td>39%</td>
<td>76%</td>
</tr>
<tr>
<td>SUITE AND RESORT HOTEL</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>OTHER PAID ACCOMMODATION (B&amp;B, CAMPSITE, CABIN/LODGE, TIMESHARE)</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>FRIENDS/RELATIVES DWELLING (NOT PAID FOR)</td>
<td>37%</td>
<td></td>
</tr>
</tbody>
</table>

LEISURE ACTIVITIES

<table>
<thead>
<tr>
<th>Category</th>
<th>Day</th>
<th>Overnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culinary/Dining Experience</td>
<td>11.3%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Shopping</td>
<td>10.0%</td>
<td>10.8%</td>
</tr>
<tr>
<td>Beach/Waterfront</td>
<td>4.9%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Touring/Sightseeing</td>
<td>3.4%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Nightlife</td>
<td>3.0%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Historic Sites</td>
<td>2.7%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Museum, Art Exhibits, etc.</td>
<td>2.3%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Concert, Theater, Dance</td>
<td>2.0%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Parks: National/State, etc.</td>
<td>1.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Gambling [slots, cards, horses, etc.]</td>
<td>1.7%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Festival/Fair</td>
<td></td>
<td>2.7%</td>
</tr>
</tbody>
</table>

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

Maryland Tourism Development Board

The Mission of the Maryland Tourism Development Board (MTDB) is to provide statewide leadership in policy development, management and competitiveness to ensure that Maryland enjoys greater economic benefits from travel and tourism spending.

Objectives

Provide leadership and routine review of the budget, staff and other resources allocated to OTD for tourism marketing and development purposes.

Ensure future growth and stability of statewide tourism development through the management of the MTDB Strategic Plan and Marketing/Development Plan.

Key Strategies for Fiscal 2018

Develop comprehensive industry-wide communications plan to educate the public and public officials of the value of the tourism industry and its impact on the quality of life for all citizens of the state to encourage funding support at the city, county and state level.

Office of Tourism Development

Administrative/Management. The goal of the Administrative/Management team is to provide the necessary organizational supervision and direction to ensure that the resources of staff, time and budget are properly deployed to produce measurable results in accordance with the department’s mission. All key strategies are developed to help achieve one or more of these four overarching strategic goals: Market Expansion, Transactionable Programs, Maximizing Opportunities, and Leveraging Partnerships (these are identified by icons on each page).

Objectives

Provide administrative services such as Maryland Tourism Development Board support, budget development and monitoring, financial reporting, accounting and procurement.

Manage and monitor the OTD staff, prioritizing and balancing the workload in order to maximize efficiency and effectiveness. Ensure that sufficient staff is deployed to accomplish the mission.

Provide and maintain an internal work environment that is efficient, effective and responsive to the mission.

Establish and maintain relationships with other agencies, tourism industry associations, organizations and institutions to ensure that Maryland’s tourism development activities are best-in-class as well as delivering the highest return on investment.

Key Strategies for Fiscal 2018

Maintain membership and active leadership in state, regional and national organizations.

Maintain ongoing collaborative relationships with Destination Marketing Organizations, County Arts Councils, Arts and Entertainment Districts, Main Streets and Maryland Heritage Areas to ensure proper State and local coordination.

Continue leadership in planning and sponsoring the Maryland Tourism & Travel Summit, the only educational program available to all of Maryland’s tourism community.

Foster interagency cooperation between local, state and national agencies.
Research Unit

The Research unit provides economic and market research, analysis and evaluation for the Maryland Office of Tourism and the Division of Tourism, Film and the Arts (TFA).

Objectives

Provide ongoing research support to OTD and TFA staff and stakeholders from the public and private sectors and engage in consumer research projects of various purposes (along with partners when relevant) to learn more about visitors and the tourism industry.

Utilize proprietary and publicly-available data to assess the performance of Maryland’s tourism economy and relevant industries and benchmark the state against other states and the nation as a whole. Be on the forefront of trends affecting the travel/tourism industry along with research resources, tools and methods.

Collect, analyze and report the performance of tourism tax revenue by county as determined by the Tourism Promotion Act and work with the Maryland Comptroller to review percentage of revenues from those industry tax codes.

In partnership with the Destination Marketing Organizations, commission an annual study of the economic impact of Maryland tourism on jobs, payroll, tax revenues and expenditures. Explore additional opportunities for leveraging dollars to collectively purchase relevant research products.

Collaborate with CRUSA’s research team in projects that study overseas visitors of relevant key markets and other trends affecting international travel.

Inventory/review internal data collected and analyzed by all OTD units and outside vendors to avoid duplication of efforts and more efficiently communicate research results to all relevant stakeholders.

Key Strategies for Fiscal 2018

Manage the purchase of syndicated research products and develop a profile of visitors to track the performance of OTD’s efforts and develop strategies to better reach target audiences. When relevant, use findings to inform or provide guidance to other partners in their efforts and initiatives.

Increase analysis of digital consumer-generated data gathered through visitmaryland.org and other sites managed by OTD, mobile apps and social media. These findings will benefit team members who are developing content, engaging consumers and demonstrating the value of OTD’s digital properties to advertisers and other partners.

Track and report OTD’s marketing/advertising-generated leads and inquiries and analyze what sources are effectively reaching consumers and sparking interest from consumers.

Identify and quantify the benefits of OTD’s grant programs at the local level with emphasis on DMO marketing investments in key feeder markets.

Improve the collection and analysis of data from Welcome Centers and bus/group tours, and through the implementation of new technology features, track the activities of these visitors during their travels including purchases.
Advertising and Communications

ADVERTISING—MEDIA AND PRODUCTION. The goal of the Advertising & Communications unit is to raise the awareness of and interest in Maryland as a travel destination. OTD focuses the State’s marketing efforts on those consumers, time periods and markets that reap the highest awareness levels, greatest return on investment, and lowest cost per customer acquisition.

Objectives

Use innovative advertising creative with strong images and call-to-action messages together with effective media placement strategy, to measurably maximize advertising return on investment, customer inquiries, engagement, time spent in state, and spending in the state.

Focus communication efforts on Maryland’s most compelling tourism messages, as determined by our most recent consumer research (both quantitative and qualitative).

Increase visitor revenue volume by targeting customers, particularly non-Maryland vacationers, with a heightened focus on overnight stays.

Key Strategies for Fiscal 2018

Showcase Maryland as an exciting, must-see destination, offering lots to do.

Focus television advertising flights in target markets (Baltimore, Washington D.C., Harrisburg, Philadelphia, Pittsburgh, New York City, Cleveland, Columbus and Cincinnati) in spring and fall flights to drive awareness.

Continue to maintain a Maryland marketing presence year-round, including annual online search efforts and “Maryland Minute” radio sponsorships in Baltimore and Washington D.C. Explore other media outlets to further expand reach for this year-round strategy.

Develop a communications platform that can be leveraged and enhanced by the DMOs and the private sector to increase awareness of Maryland as compelling destination.

Work with the newly installed advertising/marketing agency to develop a new signature advertising campaign, to be carried across multiple platforms for the next three years.

Continue to maintain a Maryland marketing presence year-round, including annual online search efforts and “Maryland Minute” radio sponsorships in Baltimore and Washington D.C. Explore other media outlets to further expand reach for this year-round strategy.

Explore opportunities for extending advertising reach with private-sector tourism industry interests through collaboration and coordination of advertising programs and initiatives.

Promote Maryland’s Scenic Byways as an ideal way to experience the variety of Maryland’s destinations and authentic cultural heritage. Promote ongoing visitation of the new Harriet Tubman Underground Railroad Visitor Center.

Review media opportunities in light of trend for consumers to increase their travel budgets and travel more. Concentrate on further developing overnight visitation from Ohio and Western Pennsylvania to promote growth in tourism tax revenue.

Develop marketing materials, collateral and public relations strategy to support the ‘Savor Maryland’ initiative.

Expand presence in newest digital marketing platforms to balance media delivery to generational targets and to increase transactionable opportunities.

Continue to develop our state Welcome Centers as storytelling destinations.

Promote Maryland’s Scenic Byways as an ideal way to experience the variety of Maryland’s destinations and authentic cultural heritage. Promote ongoing visitation of the new Harriet Tubman Underground Railroad Visitor Center.

Continue to work with Capital Region USA on international marketing efforts in its trade markets of the U.K., France and Germany.

Continue to work with BrandUSA on international marketing efforts in Canada and Korea.

Destination Maryland, The Official Guide to Maryland State Travel; American Way Spotlight, a 32-page special section in the official in-flight magazine of American Airlines.
Advertising and Communications

PUBLIC RELATIONS AND SOCIAL MEDIA OUTREACH. The Public Relations and Social Media Outreach team works to secure third-party editorial coverage and online conversations about Maryland as a travel destination. They collect, create, and curate compelling editorial content for communications outlets, including VisitMaryland.org and other related sites and develop social media conversations for journalists and the public. The third-party endorsement of Maryland as a travel destination is a compelling motivator for consumers planning their leisure and business activities.

Objectives

Build and maintain awareness and packaging of Maryland as a premier vacation destination, targeting domestic and international media and influencers.

Secure media placements promoting Maryland tourism and our specific initiatives that have a value of at least $17 million, as measured by our Maryland Media Measurement (M3) standards.

Influence visits to the state by interacting and connecting potential travelers and Maryland fans online via social platforms such as Facebook, Instagram, Twitter and YouTube.

Continue to promote the significant impact the tourism industry has on the economic health of Maryland and position the division’s leadership as subject matter experts to the media.

Key Strategies for Fiscal 2018

Strategically coordinate all outgoing tourism messaging between platforms (advertising, electronic communications, social media, sales) and our featured consumer content and initiatives.

Support specific new state Tourism initiatives (i.e., Frederick Douglass bicentennial, Appalachian program, Fleet Week 2018, Savor Maryland initiative) with media engagement and social media strategies.

Promote Maryland travel products through media missions, trade shows, media familiarization tours, educational seminars and consumer promotions.

Target Maryland’s core feeder markets through social media engagement, familiarization tours, and press outreach and missions to Pittsburgh, Philadelphia, New York City, Cleveland, Columbus and Cincinnati.

Target Canadian media outlets, with a focus on Toronto, to coordinate press outreach with enhanced travel trade sales efforts.

Continue to work with Capital Region USA to focus on promoting Maryland’s Scenic Byways, culinary, and outdoor recreational offerings.

Increase video content for deployment on OTD-owned assets to amplify Maryland’s content to customers.

Continue hosting the Blogger Bash to introduce vetted lifestyle bloggers to the DMOs and to Maryland products.

Continue to implement social media training for DMOs and the private sector to further amplify OTD’s messaging.

From left: A segment on CBS Evening News on the Harriet Tubman Underground Railroad Visitor Center; a segment on Fox 45 News on Maryland Wine Month.
Advertising and Communications

**CONTENT AND MULTIMEDIA VISITOR COLLATERAL.** High-quality and informative print and digital publications are designed to inspire consumers to choose Maryland as a travel destination, encourage longer stays and motivate repeat visits. This “owned” media channel allows OTD to communicate in more detail than paid media (advertising) or earned media (press outreach). Additional vehicles target the tourism industry, communicating OTD’s messaging, results and marketing programs.

**Objectives**

Produce high-quality print, online and video products that support customer experiences, our marketing initiatives, and highlight Maryland as a must-see destination that is exciting and offers lots to do and influence customers to visit the state.

Develop content funnels to support marketing initiatives for use throughout OTD’s communications channels.

Develop strategic advertising sales opportunities and transactionable programs for OTD products to offset production costs.

Inform the travel industry and OTD partners of our office’s activities, initiatives and promotional/marketing opportunities through regular communication.

**Key Strategies for Fiscal 2018**

Work with publishing partner to develop engaging content for *Destination Maryland*, the state’s primary printed travel resource. Re-evaluate content, presentation, and listings in the guide to make it more informative and useful.

Grow visual assets through commissioned shoots as well as reaching out to DMOs and other tourism partners for sharable visual assets. Continue to catalog images/videos and supplement the accompanying credit, rights and usage data in the Digital Asset Management system (WebDAM).

Produce and launch four to five new Byways videos to showcase the routes as a viable way to explore Maryland.

Continue to refine quarterly web content strategy to most effectively deploy and feature assets.

Work with research unit and product development unit to determine best analytical method to gauge consumer’s interaction with content and how they best consume information on Maryland travel products to guide development of consumer publications and outreach.

Conduct research to determine how consumers want to receive travel information and through which channels/outlets.

Deploy our newest video assets to strategically integrate with ongoing messaging and social media outreach.

Re-evaluate and update Civil War suite of products for maximum impact.

Continue to work with Interactive Services to deploy easy-to-use and downloadable alternatives to printed publications.

<table>
<thead>
<tr>
<th>PUBLICATION</th>
<th>AUDIENCE</th>
<th>DISTRIBUTED</th>
<th>QUANTITY</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>This Month in Maryland</em> e-newsletter</td>
<td>Consumer</td>
<td>Monthly</td>
<td>140,000+</td>
</tr>
<tr>
<td><em>Insights</em> e-newsletter</td>
<td>Industry/Gov’t</td>
<td>Bi-weekly</td>
<td>9,500</td>
</tr>
<tr>
<td><em>Product Development</em> collateral</td>
<td>Consumer</td>
<td>As needed</td>
<td>As needed</td>
</tr>
<tr>
<td>Profile sheets</td>
<td>Trade and Media</td>
<td>As needed</td>
<td>As needed</td>
</tr>
<tr>
<td><em>Destination Maryland</em></td>
<td>Consumer</td>
<td>January 2018</td>
<td>250,000</td>
</tr>
</tbody>
</table>
Advertising and Communications

DATABASE SERVICES. It is imperative to maintain the Visit Maryland database of assets for the OTD website, and to refresh and enhance the content on an ongoing basis. The database must be easily integrated for use across office platforms—Call Center, Fulfillment Center, Welcome Centers, kiosks, mobile applications and publications.

Objectives

Provide the most persuasive and comprehensive information on Maryland tourism products and events. Ensure that information is readily available to prospective customers at every travel planning opportunity – pre-trip and during trip.

Key Strategies for Fiscal 2018

Continue to maintain and further enhance database content to accurately reflect Maryland’s tourism assets.

Develop and coordinate robust content that is aligned with OTD priorities and/or programs such as culinary, outdoor recreation and Chesapeake-themed products.

Refine the data hygiene of Maryland data as it drives the website and publications. The data is also deployed through various feeds to OTD partners. Develop workflows and procedures for easy assimilation of all data from multiple sources including industry partners, event organizers and county tourism offices.

Manage and maintain a fully integrated technology program and infrastructure for Call Center, Fulfillment Center, Welcome Centers, kiosks, mobile applications and publications.

Interactive Services Unit

The goal of Interactive Services is to keep pace with emerging technologies and our customers’ preferences by providing engaging content that targets and captivates travelers and showcases Maryland as an exciting, must-see destination.

Objectives

Leverage technology to monitor and gain a deeper understanding of what our consumers are searching, jump on trends, respond to media activity and coordinate with content creators on the development of storytelling and unique, niche content.

Support and empower our tourism industry partners by providing access to news, education and resources.

Key Strategies for Fiscal 2018

Develop a program to increase transactions and generate revenue by offering enhanced listings on VisitMaryland. Tourism partners will have the opportunity to make their business listing more prominent on the website by adding more compelling descriptions, photos and book-it links.

Expand VisitMaryland reach by taking advantage of strategic alliances and partnerships with Brand USA, Capital Region USA and Trip Advisor and enhance Maryland Tourism’s presence on those sites.

Work with our sister agency, the Maryland State Arts Council (MSAC) to help promote the 50th anniversary of MSAC and in doing so — highlight the arts and music scene in Maryland.

Assist all County Destination Marketing Organizations (DMOs) in their individual marketing efforts by sharing OTD-created high quality photo and video assets; and work with them to enhance their destinations’ content on VisitMaryland.

Work with the database services team to allow industry partners to update their database listings similar to the way they are able to manage their event listings online.
Tourism Development

CUSTOMER CONTACT PROGRAM – WELCOME CENTERS, CALL CENTER AND FULFILLMENT SERVICES. Maryland’s eight Welcome Centers are vital gateways for travel information and customer service. Simultaneously, they offer the tourism industry an unparalleled opportunity to reach visitors through free statewide brochure distribution and seasonal/regional promotions.

Objectives

Manage the Customer Contact Program to ensure efficient and effective operation of Welcome Centers, the Call Center and Fulfillment Services.

Utilize the Welcome Centers as “out-of-home” media outlets—promoting initiatives and the private sector on a continual basis.

Manage and administer Grant Programs to leverage DMO marketing investments in key feeder markets.

Key Strategies for Fiscal 2018

Provide operational oversight for Welcome Centers, the Call Center and Fulfillment Services. Responsibilities include budgetary administration, contractual administration, facility evaluations, hiring/supervising staff, training activities, industry outreach, data collection/reporting, etc.

Enhance the Welcome Center experience through new exhibits, window displays and programming that promote statewide, regional and seasonal tourism experiences that align with OTD’s content calendar.

Coordinate with the State Highway Administration on operations and maintenance through regular communication channels and attending quarterly Rest Area Meetings.

Support the Travel Trade Sales program by attending trade shows and conducting industry outreach.

Conduct outreach activities that best support industry education, engagement in OTD programs and/or promote the state as a must-see visitor destination.

OTD responds to consumers and organizations requesting Maryland travel information through Welcome Centers, the Call Center, reader response cards, bulk order forms and OTD’s websites via its Fulfillment Services operations located at the Mason Dixon Welcome Center.

A still from the Harriet Tubman Underground Railroad Scenic Byway video; a sample topic page from the VisitMaryland.org website
Tourism Development

PRODUCT DEVELOPMENT. The Tourism Development Unit coordinates programs that assist with the development of tourism assets and products that elevate the state’s competitive advantage in the domestic and international marketplace. Through direct engagement, the team ensures the efficient and effective production of distinctive and marketable visitor experiences that will showcase the state as a must-see destination and that positively impact the growth of tourism sales tax revenues.

Objectives

Ensure that existing initiatives are enhanced through stakeholder engagement and product development (place-based, print, web and digital) and are effectively integrated into OTD marketing platforms. Initiatives include, but are not limited to, Maryland Civil War Trails, Maryland Scenic Byways and the Maryland Underground Railroad Initiative.

Provide tourism development technical assistance to agencies, organizations and stakeholders as required or requested to ensure visitor-ready and marketable destinations, products and experiences. Initiatives include Appalachian Maryland, Fish & Hunt Maryland, Savor Maryland and outdoor recreation.

Key Strategies for Fiscal 2018

Manage the Maryland Civil War Trails Initiative, including updating digital and print products, executing an annual maintenance contract, and coordinating a promotion associated with the 15th Anniversary of the program.

Maintain a seat on the multi-state Civil War Trails Advisory Committee.

Manage the Maryland Underground Railroad (UR) Initiative which includes: Participating in the Harriet Tubman UR State/National Historical Park exhibit development team; Completing the HTUR Byway map-guide and audio-guide project, including closeout of the Maryland Heritage Areas Authority grant; Initiate the "20 more by 2020 in time for the 20" outreach program to recruit new Network to Freedom members; Coordinating with the National Park Service and representatives from Maryland, Delaware and Pennsylvania on a multi-state HTURR byway.

Coordinate with the State Highway Administration and other stakeholders on the development and marketing of Maryland’s 18 Scenic Byways, including the maintenance of print and digital products. Work with Capital Region USA and Brand USA to continue international marketing efforts of “fly-drive” products and experiences.

Provide product development support as needed and required by emerging initiatives such as Appalachian Maryland and Frederick Douglass.

Continue to seek out and secure funding for key projects from alternative funding sources.

INDUSTRY AND INTER-AGENCY ENGAGEMENT. The Tourism Development Unit takes the lead in working directly with the industry to build the economic output of destinations and businesses. Through outreach activities and inter-agency coordination, the team assists stakeholders who are working to develop competitive assets and destinations that will increase the number of visitors to the state and positively impact the growth of tourism sales tax revenues.

Objectives

Provide tourism development technical assistance to agencies and stakeholders as required or requested to ensure optimal visitor-ready tourism products.

Provide relevant tourism education and training to private-sector stakeholders statewide to increase industry engagement in OTD programs and with OTD staff.

Key Strategies for Fiscal 2018

Provide support for Maryland Fleet Week and Baltimore Air Show being held in October 2018.

Implement a communication strategy to engage/inform agency, organization and industry stakeholders associated with Appalachian Maryland, Savor Maryland, Maryland Bayways, etc. Activities include database development, evaluation of assets, digital content development and marketing promotions such as “Febrewary,” Oyster Trail, Frederick Douglass, etc.

Manage the Outdoor Recreation Initiative, which includes but is not limited to, advancing Fish & Hunt Maryland, evaluating cycling products and experiences, supporting the development of unique trail assets, and advancing motorized and non-motorized boating experiences.

Increase the awareness of OTD marketing opportunities and provide destination marketing expertise through the delivery of high-quality education and training presentations. Presentations will be delivered in the format that best suits stakeholder audiences which include trade associations, businesses, DMO members/constituents, towns, municipalities, agencies, etc.
MARKETING PARTNERSHIPS. The Tourism Development Unit is responsible for the management and administration of programs that leverage state investment with other public and private sector marketing investments. In FY 2018, under the direction of the Maryland Tourism Development Board (MTDB) and as authorized by the Tourism Promotion Act of 2008, OTD will grant $2.5M in funds directly to the County-recognized Destination Marketing Organization (DMO) for each Maryland County, Ocean City and the City of Baltimore. Grant funds are intended to leverage DMO marketing investments in key feeder markets and are not intended to replace local DMO investment. Additional strategic marketing partnerships may be developed at the discretion of the MTDB and are subject to available funds.

Objectives

Ensure the DMO grant program aligns with evolving marketing priorities and funds are utilized to increase visitation by showcasing the state as an exciting, must-see destination.

Administer the DMO grant program to meet internal deadlines and deliverables.

Manage the Private Sector Consumer Advertising Partnership Program (PSCAPP) in accordance with its guidelines and ensure that funds are utilized to increase visitation by showcasing the state as an exciting, must-see destination.

Key Strategies for Fiscal 2018

Continue to administer the County Cooperative Grant Program, which includes, but is not limited to: preparing programmatic reports; participating in the Maryland Destination Marketing Organizations’ Grant Review Committee meetings; reconciling reimbursement requests; administering grant documents, and providing technical assistance to grantees, measuring program effectiveness, etc.

Support the MTDB and the Secretary of the Department in developing new guidelines and cooperative programs in response to performance metrics of the Tourism Promotion Act.

Administer the PSCAPP, which includes, but is not limited to: preparing programmatic reports; meetings; reconciling reimbursement requests; administering grant documents, and providing technical assistance to grantees, measuring program effectiveness, etc.
Travel Trade Sales

Travel Trade Sales promotes the increased salability and purchase of Maryland’s travel products to a variety of travel trade markets in North America and select international markets.

Objectives

Promote increased development and use of Maryland’s travel products to tour operators, student travel planners, group leaders, and meeting & incentive planners through trade association partnerships, marketplace participation and sales missions.

Key Strategies for Fiscal 2018

Leverage media buys in new markets with public relations efforts and client meetings.

Maintain a strong Capital Region USA international marketing partnership with Destination DC and Virginia Tourism; expand on new relationship with Korean operators.

Coordinate Maryland Fish & Hunt promotion with private sector selling consumptive sporting product at the Great American Outdoor Show in Harrisburg.

Organize participation in trade shows and marketplaces that support the selling of Maryland travel products to tour operators and receptive tour operator clients.

Coordinate with Information Technology to increase group focused web presence. This includes itineraries and tour packages, which supports sales to the packaged travel industry. Continue general updates and inputting records to keep Yoda database current.

Coordinate the development of regional tour products and participate in promotional opportunities, which will result in Maryland being highlighted as a preferred tour destination.

Continue participation in a Capital Region USA through participation in targeted U.S.-based international travel marketplaces, familiarization tours and other promotional activities.

Support efforts of the Student Youth & Travel Association coming to Baltimore in 2018. Assist with familiarization tours, sightseeing and other opportunities to showcase Maryland.

Coordinate efforts for marketing, sales and communications presence in Canada.

Maintain industry involvement to produce more business for Maryland venues and facilities by meeting, convention, conference and other group event planners.
Strategic Partnerships

The Maryland Office of Tourism Development’s Strategic Partnerships office focuses on working with corporations, organizations, associations and other state agencies to identify public/private ventures that are mutually beneficial by attracting more visitors, guests and patrons to the State of Maryland.

Objectives

Present to corporations, opportunities currently existing within the State of Maryland’s Office of Tourism that will meet the specific retention and growth needs of Maryland’s hospitality, sports, entertainment, food and beverage industries.

Work jointly with Maryland’s private sector and other State Agencies to create innovative programs that will attract more visitors to the state and add incremental revenue for both the Office of Tourism and its partners.

Re-engineer and reinvigorate Maryland’s eight state-operated Welcome Centers with modern technology, events and programs that will turn them into destination locations. Secure sponsorship contracts with corporations that will defray the $1 million annual Welcome Center operating budget, with the goal of covering all operating expenses by 2020.

Key Strategies for Fiscal 2018

Produce immersive technology (geo-fencing, beacon, virtual and augmented reality) that will increase Welcome Center visitors beyond the current 4 million annually, and allow visitors to receive discounts, book reservations and purchase tickets on-site.

Develop a computer game application by using heritage area marker GPS coordinates to create an application that will invite and incent visitors to expand their journey through the State of Maryland.

Secure contracts with companies such as TripAdvisor, Geico, Marriott, etc., allowing them to have visibility and naming rights at Maryland’s Welcome Centers.

Combine new Welcome Center technology in the Gateway to Appalachia initiative by also incorporating live entertainment, local arts and events to the grounds of Western Maryland’s Welcome Centers.

Create tourism-specific partnerships with the Maryland Office of Tourism’s sister agencies, including Maryland Public Television, Maryland Office of Transportation, Maryland Department of Agriculture, Maryland Sports Authority, Maryland Horse Association, Maryland Lottery, Baltimore/Washington International Airport, Cruise Maryland and the Maryland Department of Planning, as well as Capital Region USA (MD, DC, VA), to include them in future public/private ventures.

Work with Maryland Public Television to find corporate partners and develop content for a tourism-specific television series.

Work with the Maryland Department of Agriculture to create a joint venture that will educate farmers in their agri-tourism efforts throughout the state.

‘Maryland Welcomes the World’ event for IPW, held at National Harbor

Harriet Tubman Underground Railroad Visitor Center
## MARKETING AND DEVELOPMENT PLAN

### Events Calendar

<table>
<thead>
<tr>
<th>Year</th>
<th>Dates</th>
<th>Activity</th>
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<tbody>
<tr>
<td>2017</td>
<td>JUL</td>
<td>Destination Marketing Association International(DMAI)</td>
</tr>
<tr>
<td></td>
<td>11-14</td>
<td>Destination Marketing Association International(DMAI)</td>
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<td></td>
<td>6-9</td>
<td>International Motorcoach Group Strategic Alliance (IMG) Meeting</td>
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<td>17-20</td>
<td>Maryland Association of Counties (MACO)</td>
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<td>25-29</td>
<td>Student Youth &amp; Travel Association (SYTA) Marketplace</td>
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<td>27</td>
<td>SYTA - DC/MD Tour Operator Dinner</td>
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<td>26-29</td>
<td>Educational Seminar for Tourism Organizations (ESTO)</td>
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<td>Mini-Maryland on the Road</td>
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<td>Civil War Trails 15th Anniversary</td>
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<td>12-14</td>
<td>Mid-Atlantic Tourism PR Alliance (MATPRA) Media Marketplace</td>
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<td>16-20</td>
<td>VA/NC/SC Motorcoach Association</td>
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<td>24-26</td>
<td>DMAI Visitor Services Summit</td>
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<td>Maryland Underground Railroad Workshop</td>
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<tr>
<td></td>
<td>5-15</td>
<td>U.S. Sailboat and Powerboat Shows</td>
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<td>11-12</td>
<td>Greater New Jersey Motorcoach Association Marketplace</td>
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<td>18-21</td>
<td>Southeastern Outdoor Press Association (SEOPA) Annual Conf.</td>
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<td>Marketing Outlook Forum</td>
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<td>Spotlight on the Mid-Atlantic</td>
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<td>Ontario Motorcoach Association Marketplace (OMCA)</td>
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<td>OMCA Buyers Reception</td>
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<td>8-10</td>
<td>Maryland Tourism &amp; Travel Summit (MTTS)</td>
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<td>14-18</td>
<td>National Tour Association Travel Exchange (NTA)</td>
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<tr>
<td>Montreal, Canada</td>
<td>Cynthia Miller</td>
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<td>Nashville, TN</td>
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<td>Rich Gilbert</td>
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<td>Anne Kyle</td>
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<td>Winchester, VA</td>
<td>Leslie Troy</td>
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<td>Columbus, Ohio</td>
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<td>Annapolis, MD</td>
<td>Heather Ersts</td>
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<td>Atlantic City, NJ</td>
<td>Rich Gilbert</td>
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<td>Kentucky Dam, KY</td>
<td>Connie Yingling</td>
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<td>Baltimore, MD</td>
<td>Diana Chen</td>
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<td>Baltimore, MD</td>
<td>Rich Gilbert</td>
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<td>Welcome Centers</td>
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<td>Toronto, ON</td>
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<tr>
<td>College Park, MD</td>
<td>Chanda Miller</td>
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<td>Anne Kyle</td>
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<tr>
<td>Eastern Shore</td>
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<tr>
<td>San Antonio, TX</td>
<td>Rich Gilbert</td>
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</tr>
</tbody>
</table>
Board & Staff Roster

MARYLAND OFFICE OF TOURISM

Executive Committee

Mr. Rick Howarth
Chair
Park President
Six Flags America

Ms. Erin McNaboe
Vice Chair–Attractions
President
Rams Head Group

Ms. Judy Bixler
Vice Chair–Transportation
Owner/Captain
Oxford Bellevue Ferry

Mr. David Meloy
Vice Chair–Lodging
President, Merit Hotel Group

Ms. Candace Breland Osunsade
SVP, Chief Administrative Officer
National Aquarium

Ms. Heather Renz
Director of Marketing
Big Steaks Management

Mr. Vira Safai
Managing Partner
Comfort Inn Shady Grove

Ms. Cara Joyce
Owner
Urban Pirates

Mr. J. Matthew Neitzey
Executive Director
Prince George’s County CVB

Mr. Daniel Spedden
President, Hagerstown-Washington
County CVB

Ms. Ruth Umbel
Teacher–Retired

Ms. Alexandra Lyn von Paris
Founder and CEO
Route One Apparel

Legislative Members

The Honorable John C. Astle
Senator, Maryland District 30
Anne Arundel County

The Honorable Pamela G. Beidle
Delegate, District 32
Anne Arundel County

The Honorable Wendell R. Beitzel
Delegate, District 1A
Garrett and Allegany Counties

Members At Large

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Tourism and Marketing Director
Town of Ocean City

Mr. Adolph W. Ebersberger, Jr.
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Retired

Mr. Michael James
President
Hospitality Partners

Mr. Casey Jenkins
Owner
Birdland Bar & Grill

Mr. Alan Friedman
Attorney at Law

Mr. G. Hale Harrison
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301-293-8435

Casey Keyfauer
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Mason Dixon Welcome Center  
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2018 Tourism Marketing and Development Plan 29
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Executive Director  
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www.visitqueenannes.com

ST. MARY’S COUNTY
Andrew Ponti
Tourism Coordinator
St. Mary’s County Department of Economic and Community Development
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Tourism Manager
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www.wicomicotourism.org

WORCESTER COUNTY
Lisa Challenger
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