

Navigating Baltimore: Tourism, Travel & Transportation

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Visit Baltimore

Who are we?

The Role of the DMO/CVB

A private, not-for-profit organization, Visit Baltimore has four primary goals:

- 1 CONVENTION SALES & SERVICES
- 2 MARKETING & COMMUNICATIONS
- 3 MEMBERSHIP
- 4 PUBLIC AFFAIRS

We also operate the Baltimore Visitor Center.

Meetings & Tourism

How are we doing?

Baltimore Tourism

By the Numbers

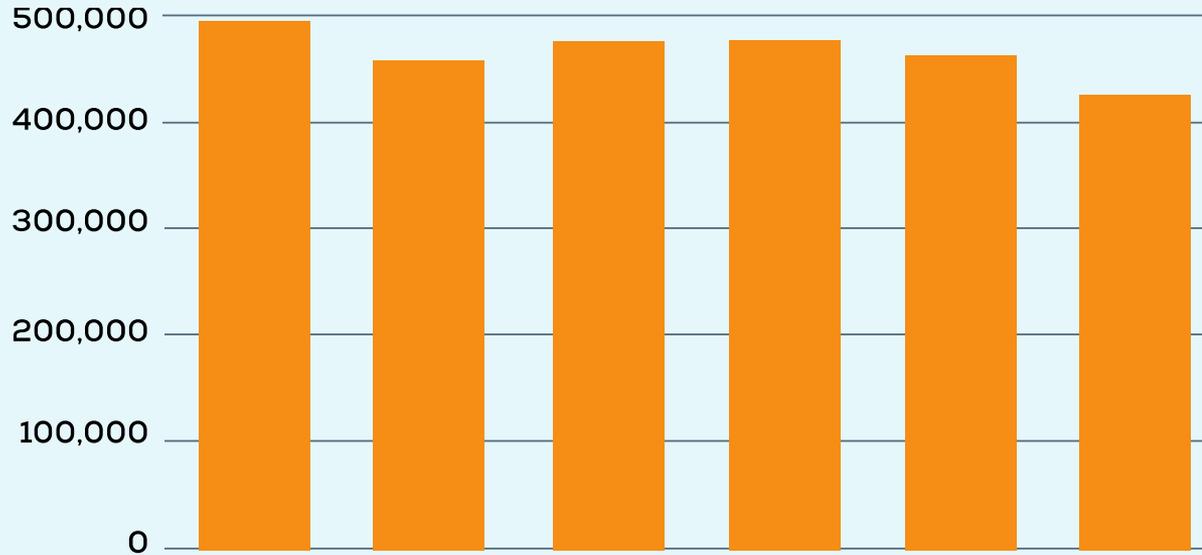
25.2 Million Visitors
~56% Day; 44% Overnight
Of Overnight, ~17% is Business Travel

\$5.2 Billion In Direct, Visitor Spending

\$630 in Tax Savings Generated
per Baltimore household

+82,000 Jobs Created or Sustained

Future Room Night Generation by Fiscal Year



FY15 Sales Figures
424,115 Room Nights
398 Events
\$263 Million in Future
Economic Impact
Bookings through **2032**

	2010	2011	2012	2013	2014	2015
	495,896	457,051	475,554	477,764	461,247	424,115

(Trends, Analysis, Projections) TAP Report Through 2022

BALTIMORE

Booking Pace 97%
Conversion Ratio 28%

*Baltimore Convention
Center*

Booking Pace 93%
Conversion Ratio 32%

PEER SET

Charlotte, Philadelphia, Pittsburgh,
Washington D.C.

Booking Pace 84%
Conversion Ratio 26%

BIG CITY SET

Atlanta, Chicago, New Orleans,
Orlando, San Francisco

Booking Pace 93%
Conversion Ratio 26%

HOT CITY SET

Austin, Indianapolis, Nashville,
Seattle

Booking Pace 100%
Conversion Ratio 26%

SYNCHRONICITIES

Anaheim, San Antonio, San Jose

Booking Pace 94%
Conversion Ratio 22%

Tourism, Travel & Transportation

Membership

Strategic Partners



Corporate Partners

Water Taxi

AAA

Zbest Limousines

MEMBERSHIP BY CATEGORY			
	NIGHTLIFE	17 Members	2 %
	ACCOMMODATIONS	69 Members	10%
	RESTAURANTS	145 Members	22%
	SERVICES including transportation	117 Members	19%
	ATTRACTIONS & ENTERTAINMENT	132 Members	17%
	AGENCIES & NON-PROFIT	41 Members	6%
	RETAIL	183 Members	25%
			704 MEMBERS TOTAL

Partnerships



Understanding Baltimore's Unique Value Proposition:

- ✓ Financial
- ✓ Convenience
- ✓ Service



In a recent survey, meeting professionals rank Baltimore #1 or #2 over its competitors in 18 of 27 value attributes.

More Convenience

Baltimore is easy to get to by air, rail and highway. Once you're here, the 1.2 million sq. ft. Baltimore Convention Center and 9,000 hotel rooms (5,500 committable), representing all of the major brands, are just steps from the famed Inner Harbor. And it's easy to explore our diverse neighborhoods via the free Charm City Circulator and the WaterTaxi.

More Service

Collaboration between Visit Baltimore, the convention center and hotels gives meeting professionals more time to focus on the program and less time sweating the details. We can connect you with leaders in key industries, from healthcare and life sciences to education and cybersecurity. Our Services team, more than 2,000 Certified Tourism Ambassadors* and our on-the-street uniformed guides are ready to ensure that your attendees have a great experience.

More Innovation

Baltimore is the first Northeast/Mid-Atlantic CVB to go green with its APEX certification. And, Baltimore, Anaheim and San Antonio have joined forces to create Synchronicity, an unparalleled coast-to-coast partnership that offers seamless year-to-year knowledge transfer, a consistent services platform and customized attendee engagement to grow your bottom line.

From the ease of doing business to accessibility and an award-winning services platform, Baltimore offers meeting professionals more value, visit BALTIMORE.ORG/MORE

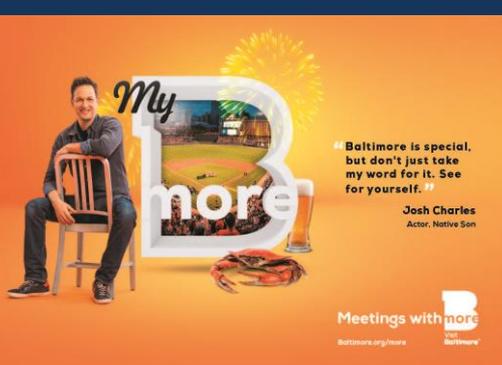
Meetings with **more**





Meetings with More

Trade Advertising Campaign



My more B

"Baltimore is special, but don't just take my word for it. See for yourself."

Josh Charles
Actor, *Native Son*

Meetings with **more**
Visit Baltimore.org/more



My more B

"The crab cakes are unbeatable, the music scene is fantastic and we have a heck of a ballpark."

Mike Rowe
TV Personality, *Lifelong Improviser*

Meetings with **more**
Visit Baltimore.org/more



My more B

"When I go to the Inner Harbor, I'm surrounded by people enjoying themselves."

Cal Ripken, Jr.
Hall of Famer, *Hometown Hero*

Meetings with **more**
Visit Baltimore.org/more



My more B

"Every neighborhood has its own unique personality."

Common
Artist, *Social Conscience*

Meetings with **more**
Visit Baltimore.org/more



My more B

"The energy is here in Baltimore."

Marin Alsop
BSO Music Director, *Trailblazer*

Meetings with **more**
Visit Baltimore.org/more



My more B

"Why do I do business in Baltimore?"

Kevin Plank
Entrepreneur, *CEO*

Meetings with **more**
Visit Baltimore.org/more



My more B

"Experience the heritage in Baltimore."

Choo Smith
Former Harlem Globetrotter, *Historian*

Meetings with **more**
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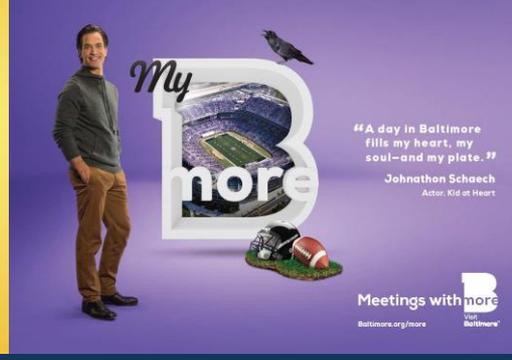


My more B

"I love bringing my family to Baltimore."

Julie Bowen
Actress, *Cool Mom*

Meetings with **more**
Visit Baltimore.org/more



My more B

"A day in Baltimore fills my heart, my soul—and my plate."

Johnathon Schaech
Actor, *Kid at Heart*

Meetings with **more**
Visit Baltimore.org/more



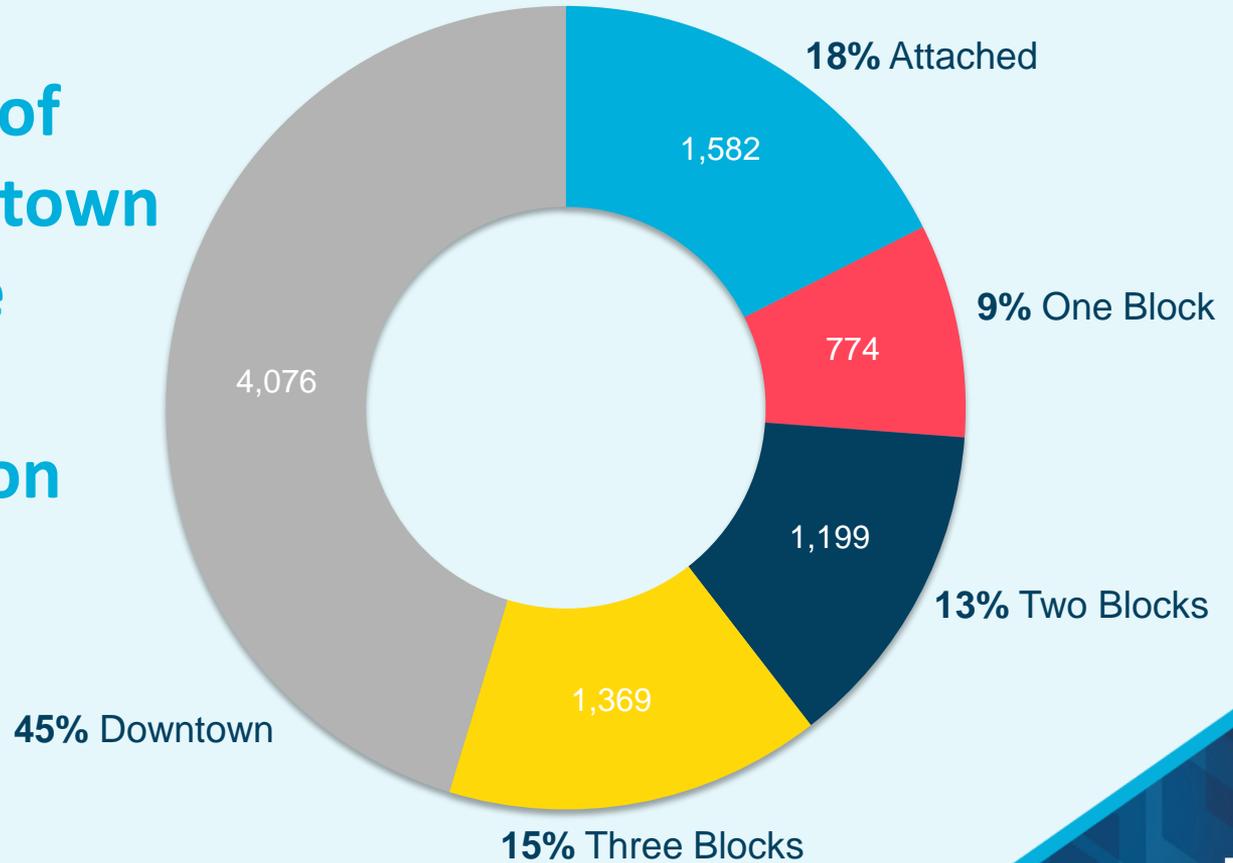
Within a **four-hour drive** from most East Coast cities

City	Miles	Driving Time
Washington, DC	39	45 min.
Philadelphia, PA	103	1 hr, 45 min.
Richmond, VA	152	2 hrs, 35 min.
Atlantic City, NJ	155	2 hrs, 45 min.
New York, NY	192	3 hrs, 15 min.
Pittsburgh, PA	248	4 hrs, 15 min.

**Easy to Get
Around**

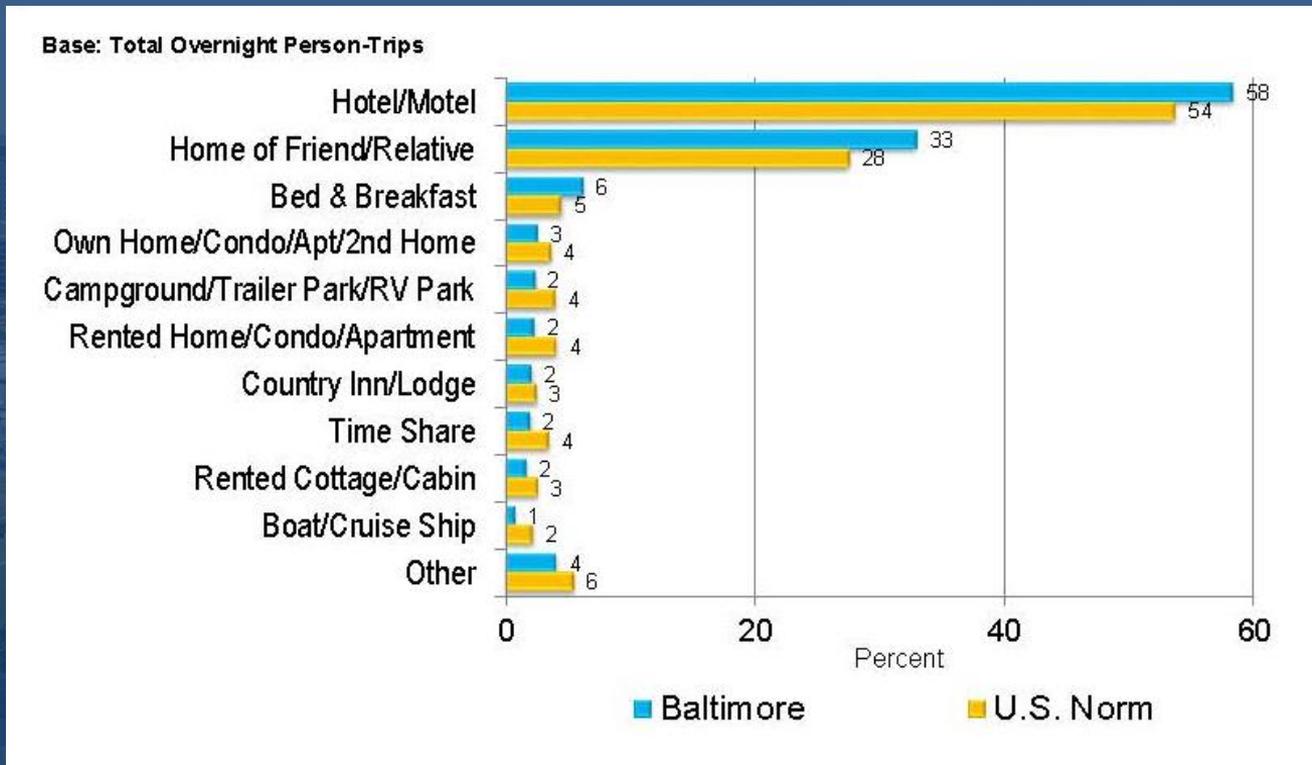
- ✓ **Walkable Convention Campus**
- ✓ **Charm City Circulator**
- ✓ **Water Taxi**
- ✓ **Light Rail**

More than half of the 9,000 downtown hotel rooms are within 3 blocks of the convention center



Visitor Travel Trends

Source: Longwoods



Visitor Travel Trends

Source: Longwoods

- ✓ Almost 2/3 (64%) of Baltimore overnight trips used their own car/truck as their transportation mode.
- ✓ Top 5 overnight trip activities/experiences were 'shopping,' 'fine dining,' 'museum,' 'landmark/historic site,' and 'beach/waterfront.'
- ✓ 'Biking' at 3% (consistent with national average, and, for both overnight/day)

Visitor Travel Trends

Source: *Tourism
Economics;
Longwoods
International*

Tourism Industry Sales (US\$ Million)						
Sector	2011	2012	2013	2014	2015	% Change
Lodging	\$1,085	\$1,125	\$1,128	\$1,188	\$1,217	2.4%
Other Transport	\$572	\$613	\$613	\$663	\$672	1.3%
Air	\$357	\$360	\$365	\$378	\$392	3.7%
Food & bev.	\$1,352	\$1,408	\$1,447	\$1,477	\$1,555	5.3%
Retail	\$640	\$675	\$677	\$676	\$705	4.2%
Recreation	\$722	\$786	\$812	\$844	\$902	6.9%
TOTAL	\$4,729	\$4,967	\$5,041	\$5,228	\$5,444	4.1%
% Change	6.8%	5.0%	1.5%	3.7%	4.1%	

Per PARTY Overnight \$:

\$49 of \$520

*'Transportation at
Destination'*

Per PERSON Overnight \$:

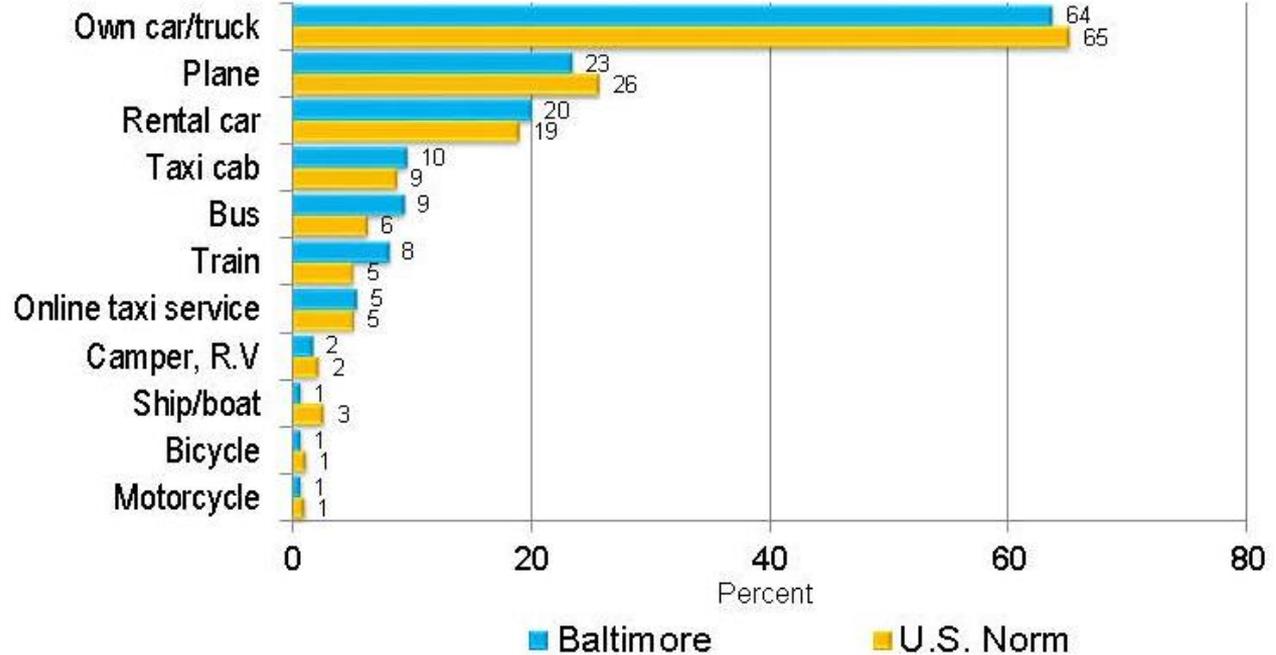
\$18 of \$193

*'Transportation at
Destination'*

Visitor Travel Trends

Source: Longwoods

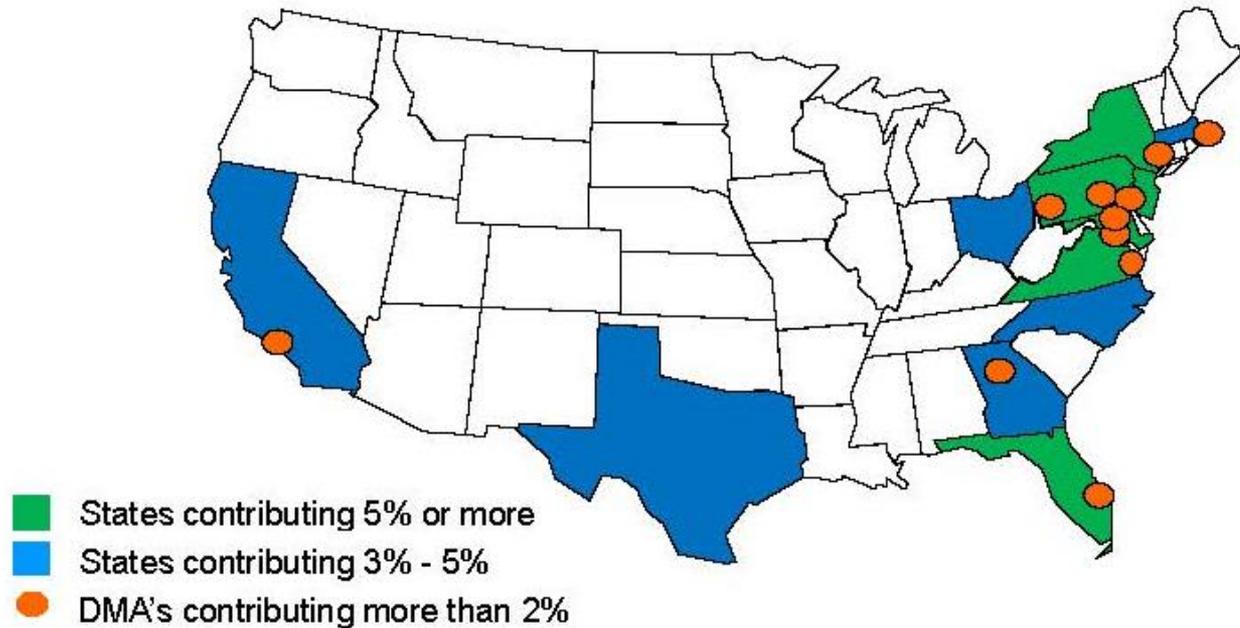
Base: Total Overnight Person-Trips



Visitor Travel Trends

Source: Longwoods

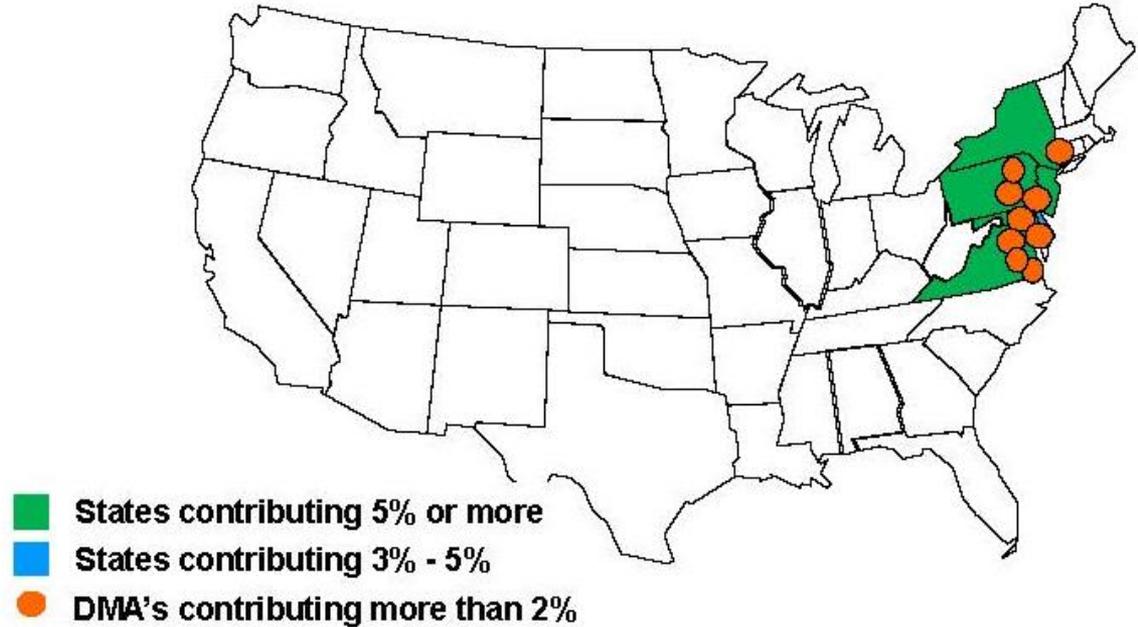
Base: Overnight Person-Trips to Baltimore



Visitor Travel Trends

Source: Longwoods

Base: Total Day Person-Trips to Baltimore



Tourism, Travel & Transportation Challenges & Opportunities?

**A
National
Issue**

“Labor Day on the Roads, Thanksgiving in the Skies”

-U.S. Travel Association

❑ **Congested highways discourage travel.**

Within 10 years, major Interstate corridors will experience average daily congestion equal to Labor Day levels of traffic.

❑ **Airport congestion is growing and current capacity is inadequate.**

In the next five years, 24 of the top 30 airports will experience congestion similar to the Wednesday before Thanksgiving at least one day per week.

U.S. Travel

5 Guiding Principles

Connect America through travel by:

- 1. Improve mobility across geography and modes.**
Travelers think in terms of mobility, not modes. Policymakers should, too.
- 2. Strengthen the travel community's voice in transportation and decision making.**
- 3. Base investments on cost-benefit analysis and performance measurement.**
- 4. Adopt new technology and prioritize data collection.**
Innovation is an economic imperative – and will play a central role in travel infrastructure.
- 5. Encourage innovative funding partnerships.**

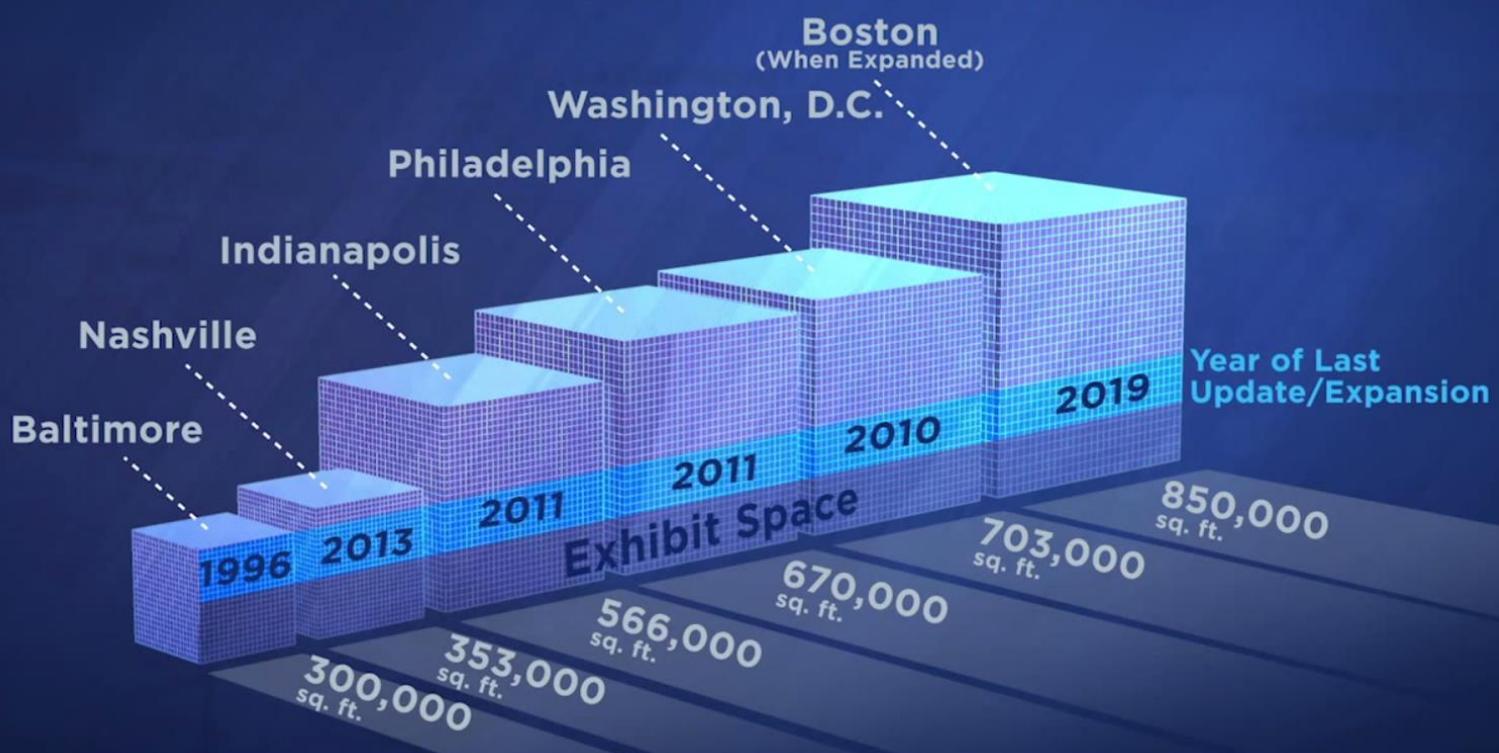


Green Initiatives



- Waste reduction & diversion program
Natural Products Expo East 2015 waste diversion rate 47.03%
- Energy conservation
- Responsible procurement
- Green Action Team
- Use of Wheelabrator Incinerator to convert trash to electricity
- Achieved level 1 APEX certification

BCC



Ranked **44th** today for size
Would be out of game without '96 expansion

\$35,000,000
In identified repairs needed

Light City Baltimore

March 28 –
April 3, 2016



LIGHT CITY
A FESTIVAL OF LIGHT AND IDEAS

Cruise Terminal & Port of Baltimore



Air



Rail



**Surface
Roads
(new)**



Harbor Point



Port Covington

**Surface
Roads
(existing)**



McKeldin Square

**Surface
Roads
(existing)**



McKeldin Square

Harbor



Baltimore 3.0



Thank You