



Maryland
OFFICE OF TOURISM

MARYLAND TOURISM DEVELOPMENT BOARD BUSINESS MEETING

**February 23, 2023
10:30 - 12:00 PM
Maritime Conference Center**





Maryland Tourism Development Board

Judy Bixler
Board Chair



Maryland Department of Commerce

Kevin Anderson
Secretary



Maryland Department of Commerce

**Liz Fitzsimmons
Managing Director**

Maryland Department of Commerce

Tom Riford
Assistant Secretary

Executive Director Report

**Liz Fitzsimmons
Managing Director**



Vision Statement

Maryland leads the way as one of America's most exciting, diverse and welcoming destinations - creating memories and experiences for visitors worldwide to enjoy.

Mission Statement

OTD stimulates and drives Maryland's *thriving tourism economy*, with a primary goal of creating a great place for all Marylanders to live, work and play.

TOURISM:

Tourism is an economic ecosystem that delivers opportunity and quality of life for Marylanders, which is derived from visitor spending.

EDA Update

Twenty-nine applications have been received and there have been multiple conversations between the applicants and Philadelphia for clarification.

- Sixteen projects have been approved totaling \$2.9 million
- Projects range from job training in outdoor recreation, culinary arts, rehabbing visitor center, marketing, ESL for hospitality workers and transportation

MARYLAND'S BIG FIVE

- ★ The Most Powerful Underground Railroad Storytelling Destination in the World
- ★ Trail System Second to None
- ★ The Great Chesapeake Bay
- ★ Scenic Byways
- ★ Fish and Hunt Maryland

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Maryland's data-driven and heart lead differentiators



Advertising & Content

Brian Lawrence
Assistant Director

New Co-op Opportunities for DMOs

- **UTZ Crab Chip Promotion (mid-summer)**
- **PressBox/JmoreLiving Travel Issue (mid-spring)**
- **“Maryland Minute” Radio Spots Takeover (mid-spring)**

Spring/Summer 2023 Advertising Campaign

- **Scheduled to run on all platforms late-April thru Mid-July**
- **Budget: \$2.9 million**
- **Last spring’s campaign ROI was \$15 to \$1**



Fish & Hunt Maryland





Research

Rianna Wan
Research Analyst

Maryland State FY 2023 - Three Months SUT Report*

| TOTAL SALES AND USE TAX COLLECTIONS ATTRIBUTABLE TO TOURISM | | | | | | | FY23 vs. FY22 | |
|---|--|------------------------|------------------------|------------------------|------------------------|------------------------|---|---|
| Sales Tax Category | | FY 2023 (\$) 3M | FY 2022(\$) 3M | FY 2021 (\$) 3M | FY 2020(\$ 3M | FY 2019(\$ 3M | Percent Change (FY 23 vs FY 22) 3M | Percent Change (FY23 vs FY19) 3M |
| 108 Restaurants, Lunchrooms, Delicatessens - WO/BWL | | \$133,995,458 | \$104,357,686 | \$103,281,776 | \$115,723,134 | \$108,373,532 | 28.4% | 23.6% |
| 111 Hotels, Motels Selling Food - W/BWL | | \$8,821,053 | \$5,038,205 | \$5,777,829 | \$11,095,432 | \$11,178,839 | 75.1% | -21.1% |
| 112 Restaurants and Nite Clubs - W/BWL | | \$88,870,220 | \$71,157,707 | \$61,271,469 | \$78,562,958 | \$75,923,882 | 24.9% | 17.1% |
| 306 General Merchandise | | \$122,408,076 | \$107,909,245 | \$102,777,235 | \$92,529,259 | \$85,572,495 | 13.4% | 43.0% |
| 407 Automobile, Bus and Truck Rentals | | \$26,050,005 | \$21,133,470 | \$17,443,385 | \$23,091,289 | \$21,867,219 | 23.3% | 19.1% |
| 706 Airlines - Commercial | | \$83,329 | \$53,748 | \$38,023 | \$84,077 | \$64,074 | 55.0% | 30.1% |
| 901 Hotels, Motels, Apartments, Cottages | | \$52,665,309 | \$27,483,164 | \$27,078,220 | \$43,570,750 | \$39,414,584 | 91.6% | 33.6% |
| 925 Recreation and Amusement Places | | \$2,951,131 | \$2,027,669 | \$2,012,983 | \$2,769,038 | \$2,538,314 | 45.5% | 16.3% |
| Tourism Tax Categories Subtotal | | \$435,844,581 | \$339,160,894 | \$319,680,921 | \$367,425,937 | \$344,932,938 | 28.5% | 26.4% |
| All Categories - Subtotal | | \$1,665,624,758 | \$1,397,005,831 | \$1,313,165,975 | \$1,282,398,471 | \$1,217,259,286 | 19.2% | 36.8% |
| Lodging Subtotal | | \$61,486,362 | \$32,521,369 | \$32,856,049 | \$54,666,182 | \$50,593,423 | 89.1% | 21.5% |
| Restaurant Subtotal | | \$222,865,678 | \$175,515,393 | \$164,553,245 | \$194,286,092 | \$184,297,414 | 27.0% | 20.9% |

FY 2019 - 3 Months = July 2018 to Sept 2018

FY 2020 - 3 Months = July 2019 to Sept 2019

FY 2021 - 3 Months = July 2020 to Sept 2020

FY 2022 - 3 Months = July 2021 to Sept 2021

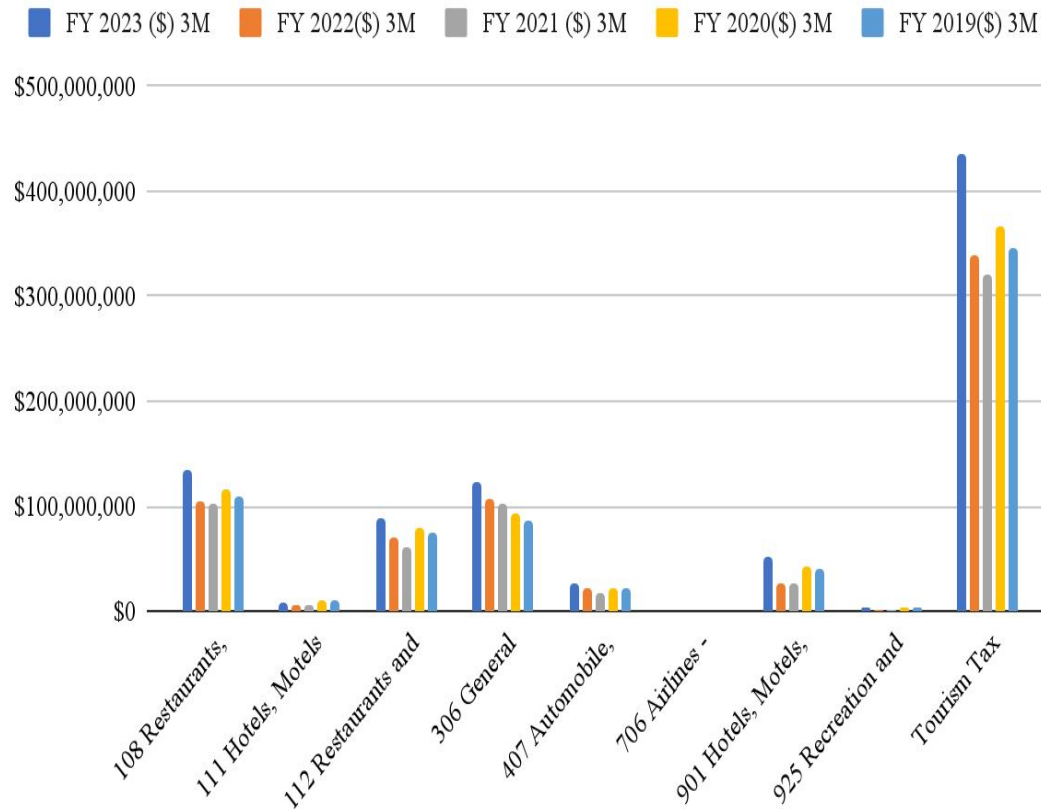
FY 2023 - 3 Months = July 2022 to Sept 2022

All Categories - Subtotal = Includes all items on the Comptroller's SUT Industry Report

* SUT = Sales & Use Tax

Maryland State FY 2023 - Three Months Sales and Use Tax Chart

- TOTAL SALES AND USE TAX COLLECTIONS ATTRIBUTABLE TO TOURISM



The first quarter of FY23 (July 2022 to September 2022)'s total tourism sales and use tax is 435.8 million. Compared to the first quarter of FY22 (July to September 2021), 28.5 percent increase. Compared to the first quarter of FY19 (July 2018 to September 2018), 26.4 percent increase. The total tourism tax revenue exceeded nearly 100 million in the first 3 months over FY22, and 90 million over FY 2019's first quarter.

The Lodging Subtotal (code 111 & 901) in the first quarter of FY23 is 61 million, nearly 90 percent increase compared to the first quarter of FY22, almost doubled than FY 22's first 3 months; 21.5 percent increase when compared to FY19's first quarter.

The tax revenue for the Restaurant Subtotal (108 & 112) scored 222.9 million, a 27 percent increase over the first 3 months of FY22, and 21 percent increase over the first quarter of FY19.



Maryland Lodging Monitor

STR data through December 2022

| MARYLAND CURRENT MONTH ACTUALS | | | | MARYLAND YEAR TO DATE ACTUALS | | | |
|--------------------------------|-------|----------|--------------------|-------------------------------|-------|----------|--------------------|
| MONTH | Occ % | ADR (\$) | <u>RevPar (\$)</u> | MONTH | Occ % | ADR (\$) | <u>RevPar (\$)</u> |
| Jan-22 | 40.9 | 96.89 | 39.67 | Jan-22 | 40.9 | 96.89 | 39.67 |
| Feb-22 | 49.5 | 104.00 | 51.52 | Feb-22 | 45.0 | 100.63 | 45.31 |
| Mar-22 | 54.9 | 111.70 | 61.32 | Mar-22 | 48.4 | 104.98 | 50.85 |
| Apr-22 | 63.0 | 123.02 | 77.46 | Apr-22 | 52.1 | 110.55 | 57.65 |
| May-22 | 64.9 | 137.85 | 89.53 | May-22 | 54.8 | 117.46 | 64.61 |
| Jun-22 | 69.6 | 150.86 | 105.08 | Jun-22 | 57.4 | 124.31 | 71.30 |
| July-22 | 69.5 | 162.64 | 113.11 | July-22 | 59.1 | 131.23 | 77.61 |
| August-22 | 66.6 | 156.85 | 104.41 | August-22 | 60.1 | 134.94 | 81.11 |
| September-22 | 64.9 | 142.11 | 92.22 | September-22 | 60.6 | 135.79 | 82.35 |
| October-22 | 64.9 | 137.07 | 88.91 | October-22 | 60.1 | 135.99 | 85.07 |
| November-22 | 56.1 | 124.15 | 69.68 | November-22 | 60.6 | 135.04 | 81.89 |
| December-22 | 48.5 | 113.55 | 55.08 | December-22 | 59.6 | 133.58 | 79.66 |

ADR = Average daily rate

RevPar = Revenue per available room

MARYLAND CALENDAR YEAR TO DATE HIGHLIGHTS THROUGH DECEMBER 2022

| | | | | | |
|--|--------------------------------------|--|-----------------------------------|-------------------------------------|------------------------------------|
| 59.6% Occupancy 9.2% ▲ | \$133.58 ADR 14.4% ▲ | \$79.66 RevPar 24.9% ▲ | Room Rev 28.1% ▲ | Room Supply 2.6% ▲ | Room Sold 12.0% ▲ |
|--|--------------------------------------|--|-----------------------------------|-------------------------------------|------------------------------------|

PERCENT CHANGE CALENDAR YEAR TO DATE 2022 vs 2021

| REGIONS | Occ % | ADR | RevPar | Room Rev | Room Supply | Room Sold |
|------------------------|-------|------|--------|----------|-------------|-----------|
| Baltimore City | 30.8 | 21.8 | 59.3 | 60.5 | 0.7 | 31.8 |
| MD Western Region | -0.5 | 9.3 | 8.8 | 10.7 | 1.7 | 1.2 |
| MD Capital Region | 19.8 | 25.3 | 50.2 | 58.7 | 5.7 | 26.7 |
| MD Central Region | 11.5 | 18.1 | 31.7 | 34.3 | 1.9 | 13.6 |
| MD Southern Region | -0.8 | 10.1 | 9.3 | 7.5 | -1.6 | -2.4 |
| MD Upper Eastern Shore | -2.0 | 8.8 | 6.7 | 7.2 | 0.5 | -1.5 |
| MD Lower Eastern Shore | -7.1 | 5.1 | -2.4 | -2.1 | 0.3 | -6.9 |

- Lodging performance in Maryland- December 2022 (Percentage change from comparable month 2021)**
 Occupancy: 48.5% (+6.7%) Average daily rate (ADR): US\$113.55 (+11%)
 Revenue per available room (RevPAR): US\$55.08 (+18.5%)
- Year to Date December 2022 - (Compare with 2021)**
 Occupancy: 59.6% (+9.2%) Average daily rate (ADR): US\$133.58 (+14.4%)
 Revenue per available room (RevPAR): US\$79.66 (+24.9%)
- MD Lodging Performance Monitor - Dec 2022 w Counties link: <https://industry.visitmaryland.org/industry-research-reports>

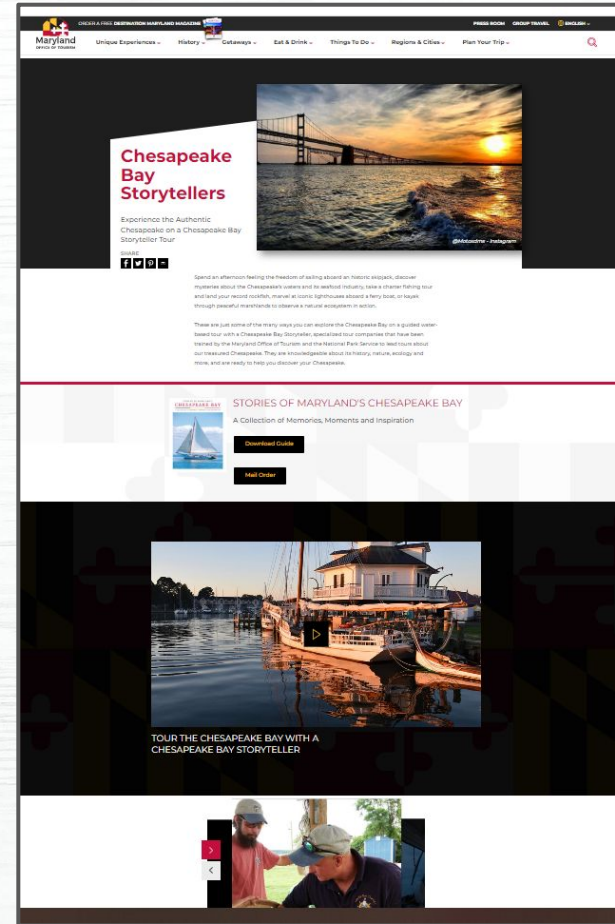
Tourism Development

Marci Ross
Senior Assistant Director

Chesapeake Bay Storytellers

Next Steps:


- Findings and best practices shared with OTD & National Park Service (NPS) team on 2/24
- Stakeholder communication process under development
- Chesapeake Bay Storyteller tour guide training begins on 3/1 with new hybrid format and with more diverse content including African American and Indigenous People-the class is full
- New VM.org content will be developed in time for June's IPW and domestic summer travel



Maryland Scenic Byways & Civil War Trails

Next Steps:

- **Scenic Byways - Implement Natl Scenic Byway Program grant (if awarded); develop Scope of Work to replace exterior exhibits at I 70 East/West Welcome Centers (WCs)**
- **Civil War Trails - Install eight new Western Region Gateway Markers at WCs and Visitor Centers; develop Scope of Work for consumer and stakeholder research studies**



Plan Your
Civil War
Adventure
today with
this QR code


EXPLORE MARYLAND CIVIL WAR TRAILS

★ ★ ★
Adventure Waits


Fascinating Civil War stories await your exploration. Here in these peaceful mountains and valleys, bold steps were taken to secure freedom for the enslaved, armies locked in desperate battle, and civilians coped with the war's onslaught.

Union forces helped save our democracy through fateful battles that set the course for the nation. The 1862 Antietam Campaign led to President Lincoln's Emancipation Proclamation and freedom for millions of enslaved African Americans. The next year, Union and Confederate troops clashed at Gettysburg, resulting in Union victory and Lincoln's stirring Gettysburg Address. The following summer, during the Battle of Monocacy, Union troops delayed and foiled the Confederate force intent on capturing the nation's capital.

A Civil War Trail driving route follows each of the events. Drive down scenic roads once filled with marching troops, hike through mountain passes that once echoed with battle, cycle past quiet graveyards where soldiers rest far from home, and paddle waterways through landscapes filled with stirring Civil War stories that embody the nation's struggle for self-determination.

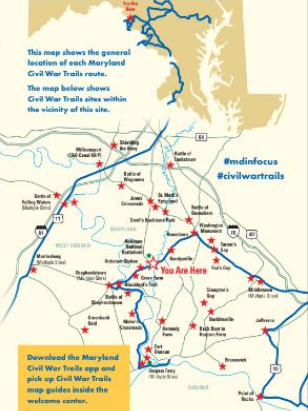


Take a hike along the Appalachian Trail to the War Correspondents Arch in Gettysburg State Park. - Courtesy Visit Frederick



Visit the Washington Monument overlook at South Mountain State Battlefield. Snap a selfie and use #mdinfofocus and #civilwartrails. Courtesy Maryland Office of Tourism

This map shows the general location of each Maryland Civil War Trails route. The map below shows Civil War Trails sites within the vicinity of this site.



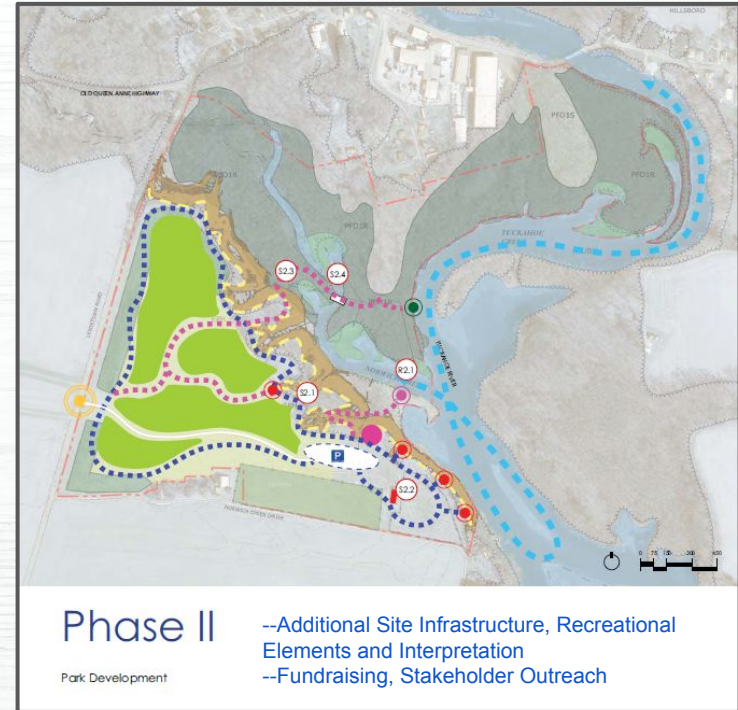
#mdinfofocus
#civilwartrails

Download the Maryland Civil War Trails app and pick up Civil War Trails map guides inside the welcome center.

Most Powerful UGRR Storytelling Destination in the World

Next Steps:

- Develop itinerary for Network to Freedom sites from Howard County to Cecil County
- Continue discussions for Chesapeake Through Tubman's Eyes interpretive marker at the National Aquarium
- March planning meeting with the NPS Network to Freedom 25th anniversary team
- Participate in the kick-off meeting for Phase II Implementation of the Frederick Douglass Park on the Tuckahoe



Trail System Second-To-None

Next Steps:

- Conduct analysis on current VM.org content
- Research content and stories for land trail digital content
- Coordinate with OTD staff and external stakeholders on the pathway to the marketplace process in preparation for National Trails Day (6/3/23)

20 Follow the Captain John Smith Chesapeake National Historic Trail



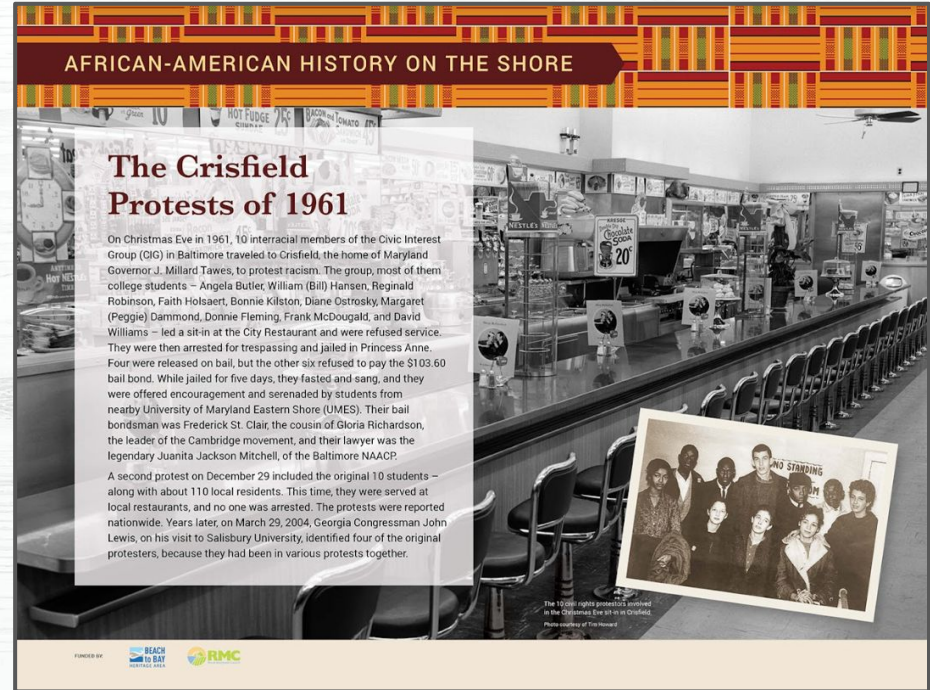
Launching on the Captain John Smith Chesapeake National Historic Trail at Piscataway Park in Accokeek.

Follow in the wake of Capt. John Smith, 400 years after he explored the Chesapeake Bay. The National Park Service's Captain John Smith Chesapeake National Historic Trail traces his journeys through his notes and journals, as the explorer and his men traveled the area by small boat. Details and maps are available at the [Park Service website](#).

Emerging Initiatives - Accessible Maryland, Indigenous Maryland, Maryland's Civil Rights Story

Next Steps:

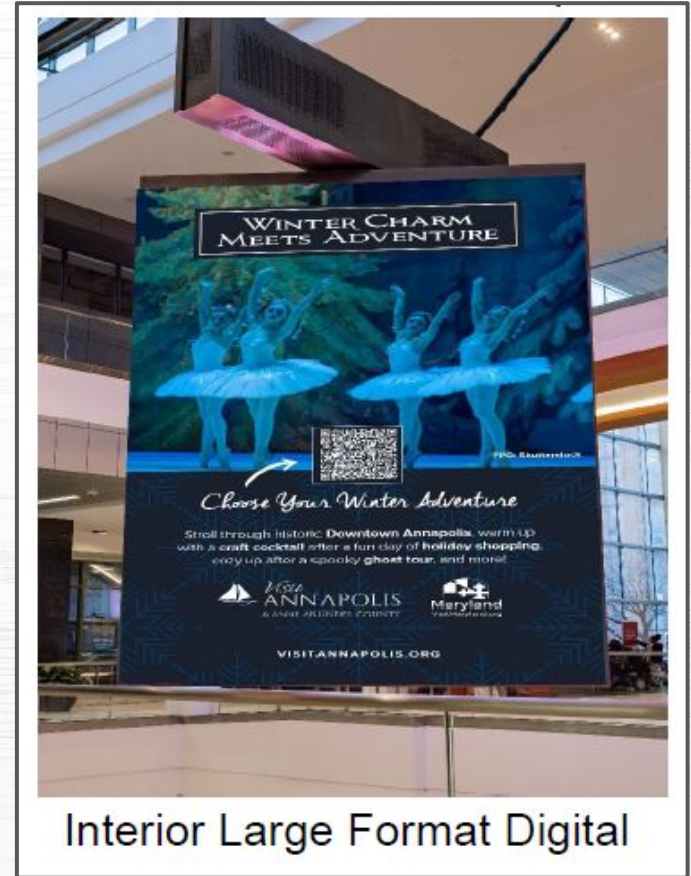
- Accessible Maryland - Develop Scope of Work for Visual Asset Development (photos and videos) to maximize warm weather production period
- Indigenous Maryland - Transition content from Chesapeake Bay Storytellers training to VM.org content
- Maryland's Civil Rights Story - Develop and distribute a stakeholder survey to inventory of visitor-ready experiences



FY23 DMO Grant Program

Next Steps:

- Complete July-Dec Reimbursement Request review process (40% complete)
- Begin Qualifying Expenditure Report review (reports due 3/31/23)
- Continue to provide technical assistance on compliance and eligibility
- Track and monitor progress of the program
- Analyze Baltimore and DC DMO market investment



Interior Large Format Digital

Visitor & Business Support Services

Next Steps:

- **Industry Database** - Develop strategic communications process to coordinate outreach activities including focus on private sector promotions and packages
- **Welcome Centers** - Fill supervisor and travel counselor vacancies; complete Youghiogheny Overlook graphic installation
- **Fulfillment** - Transition internally and externally to CY23 publications
- **Call Center/Info Inbox** - Manage inbound inquiries from customers/stakeholders



EXPAND YOUR MARKETS THROUGH VISITMARYLAND.ORG

OTD's website attracts almost three million visitors annually. To ensure your business, event and/or deal is accessible to these travel decision-makers, claim or update your listings through **the website's self-entry portal**. Please check your listing often to ensure that it capitalizes on thematic promotions and other OTD marketing activities.

[SUBMIT / EDIT YOUR LISTINGS NOW](#)

Strategic Partnerships & Public Relations

Cynthia Miller
Director

September - International Underground Railroad Month

- Celebrating 5th Anniversary of IUGRR and 25th Anniversary of U.S. Park Service Network to Freedom
- Governor's Proclamation Event - Baltimore, August 24 or 29, 2023
 - Focus will be on the impact of the B&O Railroad and Philadelphia, Baltimore and Washington Railroads had on the success of Maryland's Freedom Fighters
- Partners
 - Baltimore Destinations (B&O Railroad Museum, National Aquarium, Reginald F. Lewis Museum, President Street Station, Frederick Douglass Freedom and Heritage Trail and Tour, Dugan's Wharf Site, Reddy Gray Burial Site/Loudon Park National Cemetery)
 - DMOs - Visit Baltimore, Visit Baltimore County, Visit Cecil County, Visit Harford County, Visit Howard County
 - Heritage Areas, Cultural Tourism Advisory Committee, Maryland Commission on African American History and Culture, Southern Baptist Church in Baltimore

Maryland Tourism in the News

- **WBFF-Fox45: “So Baltimore” and In-Studio**
 - **2/13 - Valentines Day (Carroll County local businesses and lodging)**
 - **2/14 - Black History Month (Anne Arundel County, Frederick Douglass’s Birthday, Frederick Douglass Driving Tours and Harriet Tubman Byway)**
 - **2/17 - [National Drink Wine Day](#) (Two Lions Winery in Upper Marlboro, Grow and Fortify, Legacy Trail and the Capital Region)**
 - **2/24 - National Clam Chowder Day**
- **March Opportunities & Pitches**
 - **Crab Meat Day, Maryland Day, Wine Month, Women’s History Month**

Maryland Tourism in the News

- Garden & Gun Magazine, ["Moved to Tiers"](#)
- Northern Virginia Magazine, ["Explore Harriet Tubman's Life and the Underground Railroad in Maryland"](#)
- Recreation News, ["The Underground Railroad: An Integral Part of Maryland History"](#)
- Baltimore Fishbowl, ["Largest Great Wolf Lodge in Nation is about to Slide Perryville onto the Map"](#)

Maryland Tourism in the News - International

- **International (CRUSA)**
 - **UK**
 - **Group Media FAM (May): Health/Wellness**
 - **Germany**
 - **Freelancer (April): Outdoor, C&O Canal**
 - ***Touristik aktuell* (April): Outdoor/Trails, Sustainability**
 - **Group Media FAM (May/June): History to Cityscapes**
 - **Germany Media Mission (May 1 - 5): Vienna, Munich, Berlin**
 - **France**
 - ***Le Point* (Feb): Maritime, Outdoor/Trails**
 - **Group Media FAM (June): Luxury Travel**
- **International (Canada)**
 - ***The Toronto Star* (March): UGRR, Tubman, Black Culture**
 - **Group Media FAM (April): Chesapeake Bay, UGRR, Culinary**
 - **Confirmed Writers: *iHeartRadio*, *Le Journal de Montreal*, *Ottawa Life Magazine***
 - ***Parents* (May): Family-Friendly, Scenic Byways, UGRR**

Most Popular Instagram/Facebook Posts



visitmaryland • Follow

Ella's Enchanted Treehouses



visitmaryland Stay in the tree house you dreamed of as a kid, but even better. 🌲 Nestled in the woods of Western Maryland is Ella's Enchanted Treehouses, one of the state's most unique lodgings. Choose from four cozy tree houses, each fully furnished with utilities and amenities. Ella's is close to many local attractions, including @wispresort, Deep Creek Lake, and numerous state parks. ADA



3,929 likes

JANUARY 11

Log in to like or comment.

Most Popular Organic Post



Maryland

January 10 · 🌐

Molly, congratulations on your incredible find!
Visit Calvert County



NEWSWEEK.COM

Girl finds enormous megalodon tooth on Maryland beach on Christmas Day

Molly, 9, dove into freezing cold water to retrieve the 5-inch tooth, the largest to be found in the area.

👍 🤔 ❤️ 1.2K

126 comments 216 shares

Social Media Ad Campaign



Maryland

February 6 · 🌐

Start planning your next adventure with a FREE copy of the 2023 Destination Maryland Magazine, the ultimate guide to the state's scenic byways and regional listings of museums, attractions, history & heritage sites, arts & culture, and outdoor recreation.



Destination Maryland Magazine

Order now



Destination Maryland Magazine

Order now



Destination

👍❤️ 249

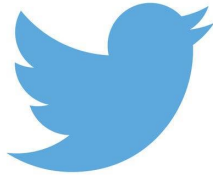
13 comments 37 shares

Social Media Platforms



[@TravelMD](#)

94K



[@TravelMD](#)

56K



[@visitmaryland](#)

109K



[@visitmaryland](#)

3.6K



[Visit Maryland](#)

1K

Reports from the Industry

- MTDB report out
- Executive Director's Council Report out
- MDMO Report Out - Kristen G.

2023 MTDB Meeting Schedule

| MTDB | DATE & TIME | VENUE |
|-----------------------------|---|----------------------------------|
| General Business Meeting | Thursday, February 23, 2023 10:30 - 12:00 PM | IN PERSON (no virtual option) |
| Update Call | Thursday, March 16, 2023 1:00 - 2:00 PM | VIRTUAL |
| General Business Meeting | Thursday, April 20, 2023 10:30 - 12:00 PM **Will be canceled | IN PERSON (no virtual option) |
| Update Call | Thursday, May 18, 2023 1:00 - 2:00 PM | VIRTUAL |
| Marketing Plan and Strategy | Thursday, June 15, 2023 11:30 am - 2:30 pm (w/lunch) Location: TBD | IN PERSON no virtual option |

THANK YOU

