



**MARYLAND TOURISM
DEVELOPMENT
BOARD MEETING
April 12, 2024**

**Location: BWI
Sheraton Hotel**



AGENDA

- I. Welcome and Call Meeting to Order**
- II. Executive Director Reports**
- III. Reports from the Industry**
- IV. Adjournment & Next Board Meeting Dates**



Liz Fitzsimmons

Managing Director



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.

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.

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

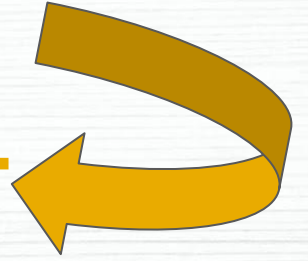
By the numbers:

Jobs	123,600
State/Local Taxes	\$2.3 Billion
Household Tax Savings	\$999

Maryland Office of Tourism Update

GENERAL MARKETING UPDATE

TOOL KIT



3 Measurable Objectives → 1 Key Outcome

The Maryland Office of Tourism measures its programs against three strategic objectives:

- **MARKET EXPANSION**
 - Further promotional pushes in Cleveland, Pittsburgh and New York metro
- **LEVERAGING PARTNERSHIPS**
 - Working with federal agencies, private sector businesses and county tourism offices on grants to generate overnight stays
- **MAXIMIZING OPPORTUNITIES**
 - Looking for those events, trends and opportunities to showcase Maryland in a positive light - domestically and internationally

TRANSACTIONAL OUTCOMES

Marketing Plan - Stepping Up



Leading Tourism Differentiators

- The Most Powerful Underground Railroad Storytelling Destination in the World
- Maryland's Trail System Second-to-None
- 18 Scenic Byways
- Fish & Hunt Maryland
- **The Great Chesapeake Bay Loop**

Evolving Tourism Differentiators

- Indigenous Maryland
- Maryland Civil Rights Initiative

Evolving Content Hubs and Threads

- Sustainability
- Seasonality
- Belong-ability



GCBL landing page, visitmaryland.org

Marketing Plan - Stepping Up

1. MARYLAND PRE AND POST CAMPAIGN AWARENESS STUDY

- a. Ad Effectiveness & ROI Study (Pre-Campaign):
- b. Post-Campaign ad effectiveness and ROI:

2. Visitation to the C&O Canal National Historical Park, 2019-2020 Visitation Analysis, Visitor Profile & Economic Impact Assessment:

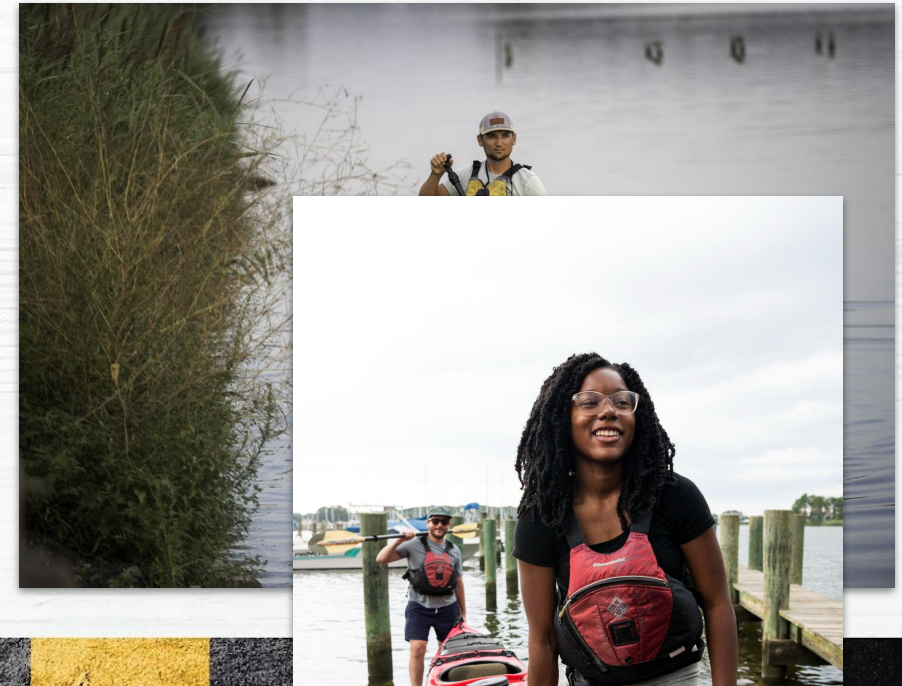
3. Voice of the Visitor * (*A section of the Maryland Travel & Tourism: Predictive Analysis)

4. Comprehensive Study of Visitation to Maryland's Chesapeake Bay RegionIGN AWARENESS STUDY



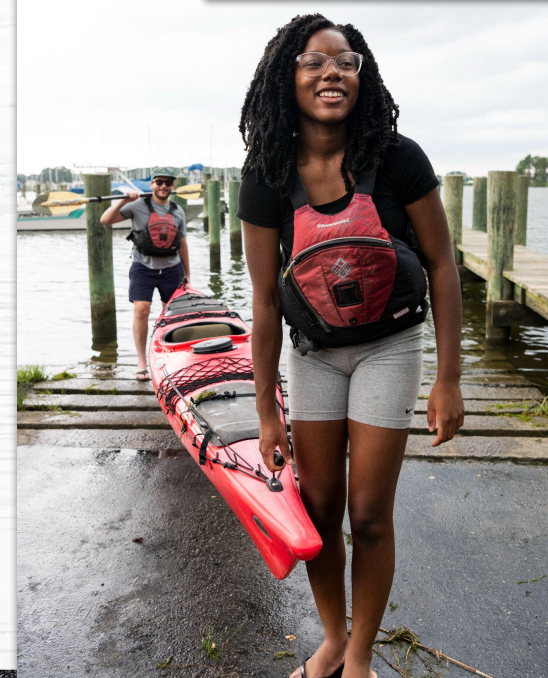
Audience Makeup:

- Top Markets of Origin:
 - Baltimore
 - Philadelphia
 - Pittsburgh
 - Washington, D.C.
 - New York Metro
- Method of Transportation:
 - Personal Auto
- Demographic:
 - 80 percent of visitors are White
 - 11 percent of visitors are Black
 - 6 percent of visitors are Hispanic/Latino
 - 40 - 55 Years Old/Split evenly Male and Female



Audience Motivators

- OTD is committed to incorporating Sustainability, Seasonality, and Belong-ability into all initiatives.
- The importance for travel brands to consider inclusion will continue to grow, especially as younger generations are more diverse than ever before.
- 7 in 10 consumers would choose a destination, lodging, or transportation option that is more inclusive to all types of travelers, even if it's more expensive.
([Expedia Group](#))
- Black travelers represented 7% of visitors to the Chesapeake Bay region. Among those in Generation X (age 42-57), more were Black (12%) compared to other generations.
([Rockport Analytics](#))





Source: DK Shifflet

- **When visiting Maryland, they stay longer –** 2.5 nights vs. 1.3 nights.
- **Skew younger.** Majority of trips by Hispanic visitors to the state are made by visitors ages 18 to 34 (60%) and 35 to 49 (27%).
- **Book direct.** Majority of Hispanic travelers to the state book their trips directly on accommodation websites (35.3%), attraction websites (16.6%) and transportation websites (18.8%).
- **Last-minute spontaneous travelers.** 59 percent of Hispanic travelers to the state visit/book their trip within the same day or one week, and 27.4 percent visit/book within two to four weeks.
- **Hispanic representation in visuals is important.** 52% of Hispanic travelers prefer destinations with Hispanic representation.

Hispanic Audience Expansion

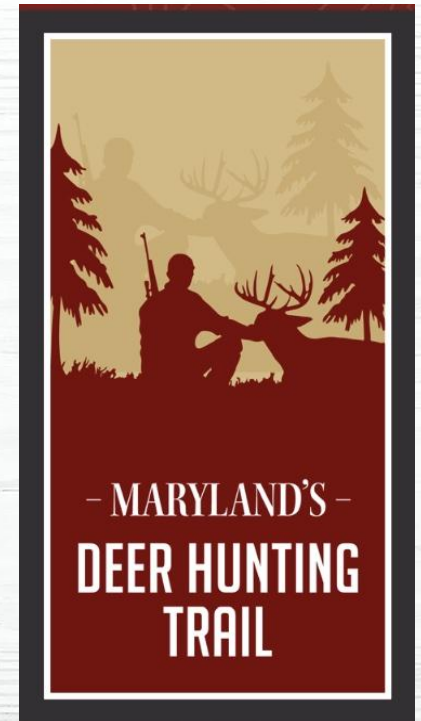
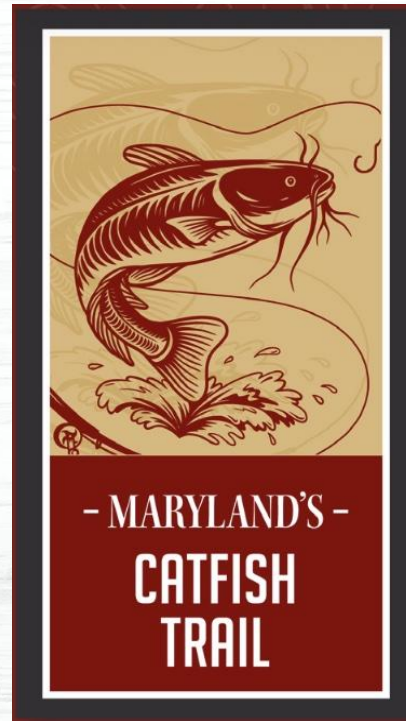
- Align media with key Hispanic interests/activities.
 - Nightlife, **boating/sailing**, birthday/other **celebrations**, **culinary**, visiting **national/state parks**, **biking**, **winery/brewery/distillery tours**, **beach/waterfront**, and tours/sightseeing.
- Develop creative and content that celebrates Hispanic cultural contributions, such as local Hispanic festivals, cuisine, art, and music.
- Test both English and Spanish versions of creative while engaging an outside resource to support translation, including regional differences.



Niche Market: Fish & Hunt Maryland

Follow the Trails

- Experiential niche products built through partnership
- Sites selected to maximize Maryland's natural resources
- Ability to move tourism dollars throughout the state
- Trail Sites as a gateway to surrounding assets
- Multi-platform marketing





Brian Lawrence

Advertising and Content

Marketing Plan - direction



Things we plan to address as we start to plan for this year's marketing plan:

- How to address measurables
- How to make it more aspirational
- How to make it relevant and useful to partners
- How much research to include
- Driving traffic back to our industry site

Advertising Campaigns

- Research has shown that our advertising garners an awareness ratio of 32:1 for dollars spent.
- Most recent ad campaign, Home for the Holidays, ran for four weeks in Nov-Dec. ROI was \$17:1 returning \$1,680,192 million in hotel booking revenues.
- Spring/Summer '24 campaign runs mid-April through July, with a media spend of approximately \$3 million. (Last year's Spring/Summer campaign had an ROI of 23:1 and hotel revenues of \$38.7 million.)
- Continue to promote Maryland to consumers in our target markets: NYC metro area, Philadelphia, Pittsburgh, Washington, D.C., Baltimore and Cleveland.
- Build upon "You're Welcome" messaging.





Rianna Wan Research

Contract renewal

OTD and DMO

- Collecting data to TE to

Tourism Tax F

The First Quarter

- Maryland
- Lodging
- Restaurant

FY24 First 5 Months

- Maryland
- Lodging
- Restaurant

The Tourism Q

Research Updates:

Contract Renewal

OTD and DMOs are working on a 3-year agreement renewal with Tourism Economics (an economic impact analysis firm)

- Collecting and sorting the data: the part of the data (Lodging, A&A tax report, Lodging F (STR) report... has been sent to TE to start laying out into the IMPLAN Model

Tourism sales and use taxes in FY2024

First Quarter of FY2024:

Maryland tourism generated a total of \$463.6 million in tax revenue, a 6.4% increase.

- Lodging subtotal: \$64.4 million, 4.75% up
- Restaurant subtotal: nearly \$ 238 million, 6.8% up

FYTD July-November 2023 - 5 Months

- Maryland tourism generated a total of \$746.9 million in tax revenue, a 9.2% increase.
- Lodging subtotal: \$93.4 million, 5.7% up
- Restaurant subtotal: nearly \$383.6 million, 6% up

The Tourism Q1 & Q2 report will be created after we receive the detailed tourism report with the monthl

Maryland Tourism Performance - Tax Revenue for FY2024 - First 5 Months (July to November 2023)

CODE			Fiscal Year 2024	Fiscal Year 2023	Increase/ (Decrease) over 2023	Percent Change
108		Restaurants, Lunchrooms, Delicatessens - WO/BWL	242,468,721	221,565,750	20,902,970	9.4%
111		Hotels, Motels Selling Food - W/BWL	14,194,989	13,152,424	1,042,565	7.9%
112		Restaurants and Nite Clubs - W/BWL	141,150,769	139,785,394	1,365,375	1.0%
306		General Merchandise	220,947,780	187,839,585	33,108,195	17.6%
407		Automobile, Bus and Truck Rentals	43,026,493	41,483,637	1,542,856	3.7%
706		Airlines - Commercial	575,572	133,480	442,092	331.2%
901		Hotels, Motels, Apartments, Cottages	79,241,333	75,215,609	4,025,725	5.4%
925		Recreation and Amusement Places	5,295,836	4,681,233	614,603	13.1%
		Tourism codes Total	746,901,492	683,857,112	63,044,380	9.2%
		Lodging subtotal	93,436,322	88,368,033	5,068,289	5.7%
		Restaurant subtotal	383,619,490	361,351,145	22,268,345	6.2%

In the first 5 months of FY24 Tourism generated a total of \$746.9 million in tax revenue, compared to the same period of last year, it has a 9.2 % increase.

Lodging Subtotal (code 111 & code 901): \$93.4 million, a 5.7% increase,

Restaurant subtotal (code 108 & code 112): \$383.6 million, a 6.2% increase.



Marci Ross

Tourism Development

Civil Rights Initiative - What is it? Why do it?

A series of projects and products that will inspire multi-night travel and help convey Maryland as a welcoming destination for all.

Phase I - 2024 Year of Civil Rights

Phase II - 2025 Recruitment Into National Park Service African American Civil Rights Network

Phase III - Assess and Advance Projects and Products



Phase I - How will it be accomplished?

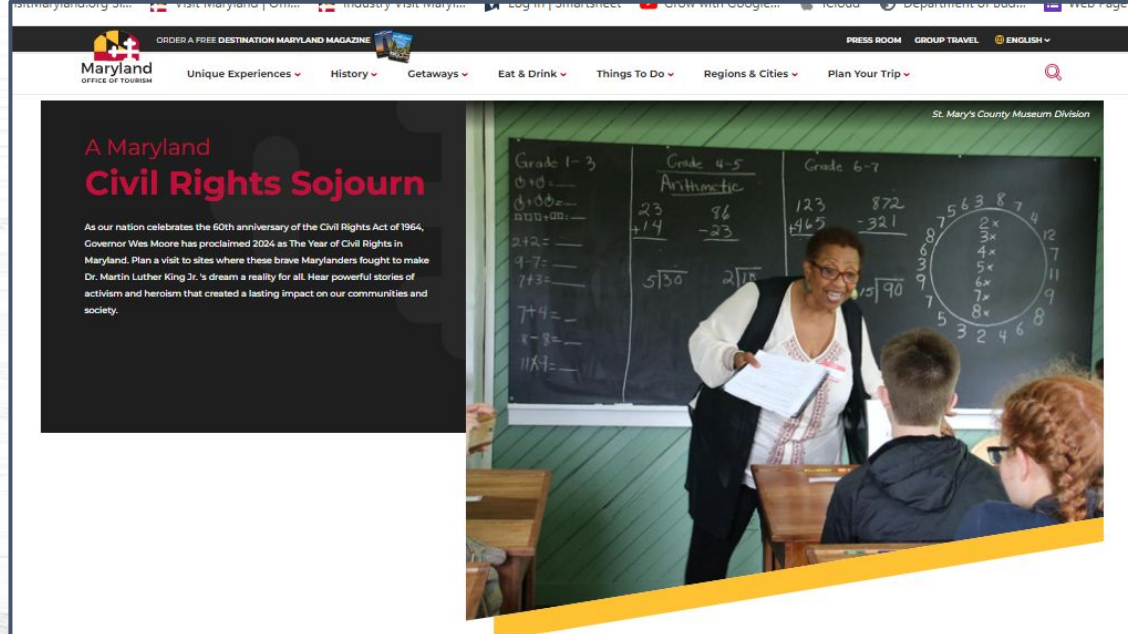
Content Creation:

Print - Statewide Map-Guide

Online - Inspirational storytelling pages about CR Heroes, Sheroes and Journeys, MD's Timeline, Three multi-night itineraries

Video: Short-form videos for YouTube and Social Media

VM.org Database Listings - Attractions, Events and Packages



The screenshot shows the Maryland Office of Tourism website. The header includes navigation links like 'Unique Experiences', 'History', 'Getaways', 'Eat & Drink', 'Things To Do', 'Regions & Cities', and 'Plan Your Trip'. A search icon is also present. The main content area features a large article titled 'A Maryland Civil Rights Sojourn' with a sub-header 'Civil Rights Sojourn'. The article text mentions the 60th anniversary of the Civil Rights Act of 1964 and Governor Wes Moore's proclamation of 2024 as the Year of Civil Rights in Maryland. To the right of the article is a photograph of a teacher, Ms. St. Mary's, standing in front of a chalkboard filled with math problems, interacting with two students. Below the photo, the text 'Civil Rights Journey Through the Capital Region and Southern Maryland' is displayed, followed by a section titled 'CAPITAL REGION' which provides a brief history of civil rights in the area.

A Maryland Civil Rights Sojourn

As our nation celebrates the 60th anniversary of the Civil Rights Act of 1964, Governor Wes Moore has proclaimed 2024 as The Year of Civil Rights in Maryland. Plan a visit to sites where these brave Marylanders fought to make Dr. Martin Luther King Jr.'s dream a reality for all. Hear powerful stories of activism and heroism that created a lasting impact on our communities and society.

Civil Rights Journey Through the Capital Region and Southern Maryland

CAPITAL REGION

Our nation's capital witnessed numerous civil rights triumphs including the March on Washington, Dr. Martin Luther King, Jr.'s "I have a Dream" speech, the 1954 Brown v Board of Education decision, and the passage of The Civil Rights Act of 1964. The Maryland region surrounding Washington D.C. also has a deep civil rights history, offering many tours and sites that shed light on the struggle for equal rights. To begin your capital region tour, take THE PRINCE GEORGE'S COUNTY CIVIL RIGHTS TRAIL, a self-guided tour of sites important in the national Civil Rights Movement. Each story details the moving experiences of Black Marylanders in Prince George's County as they fought against segregation and for equality.

Phase I - How will it be accomplished?

Marketing:

Welcome Centers - Travel counselor training and interior/exterior posters

Social Media - Original and partner amplified posts

Printed Collateral Distribution -
VM.org, Welcome Centers and
Partner Visitor Centers and sites



Example of exterior WC poster

Phase I - When will it happen?

Q1 2024 - Online content roll-out began

Q2 2024 - Online content roll-out continues, printed collateral development begins

7/2/24: Marketplace roll-out and marketing begins

Qs 3 & 4 - Marketing and Phase I wrap-up

Maryland's Year of Civil Rights

The Maryland Commission on African American History and Culture and Banneker-Douglass Museum are declaring 2024 as "Maryland's Year of Civil Rights" with exciting and relevant programming, exhibitions, and partnerships. *Stay tuned for updates!*



MARYLAND COMMISSION ON AFRICAN
AMERICAN HISTORY AND CULTURE
PRESENTS

2024 MARYLAND'S
YEAR OF
CIVIL
RIGHTS

JANUARY 1 - DECEMBER 31, 2024

With 2024 being the 60th anniversary of the signing of the Civil Rights Act (1964), original programming and participation in platforms with community partners will commemorate the milestone year of this groundbreaking legislation. From 1964's Bell vs. Maryland to 1963's Treaty of Cambridge, Maryland has been the backdrop to civil rights legislation throughout the years. Additionally, Maryland has been the home to civil rights icons who will forever have a place in the history of this nation, such as Verda Freeman Welcome, Thurgood Marshall, and Gloria Richardson.

Phase I - Who's involved?

Governor's Office

Maryland Commission of African American History and Culture

DMO's, Heritage Areas, Main Streets, 50-70 sites and programs statewide

Private Sector

All are Welcome!

2024
MARKS Maryland's
Year of Civil Rights

1928
Lord Baltimore Hotel opens

1958
After the Baltimore City Council considered but failed to pass an ordinance prohibiting racial segregation in public accommodations, the Lord Baltimore Hotel voluntarily ended its restrictive guest policies. Among the first guests to stay were the great baseball superstars Hank Aaron, Willie Mays, and Frank Robinson, all of whom had traveled to the city to play in that year's All-Star Game.

1965
Martin Luther King press conference at Lord Baltimore Hotel

1982
Property listed in the National Register of Historic places

2016
Civil Rights Activism in Baltimore's Historic West Side

LORD BALTIMORE HOTEL
est. 1928

BALTIMORE
POINTS OF INTEREST

B&O Railroad Museum

Baltimore Museum of Industry

Frederick Douglass-Isaac Meyers Maritime Park

Maryland Center for History & Culture

Reginald F. Lewis Museum of Maryland African American History & Culture

The National Great Blacks in Wax Museum


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2024 MD Year of Civil Rights Package

Our Maryland Civil Rights Package includes:
Overnight Accommodations, Breakfast for 2 at LB Bakery, Choice of 2 Tickets to Reginald F. Lewis Museum OR Maryland Center for History and Culture Center, and a Commemorative Bookmark!

Our 2024 MD Year of Civil Rights Package includes:

- Overnight Accommodations for 2 guests.
- Breakfast for Two at LB Bakery
- Choice of 2 Tickets to Reginald F. Lewis Museum OR Maryland Center for History and Culture Center
- Commemorative Bookmark.

BOOK NOW



Cynthia Miller

Strategic Partnerships and PR

National Travel and Tourism Week - 5/19 - 5/25

- 2024 Theme - TRAVEL. Powering the Economy. Connecting America.
- Governor's Proclamation Event
 - May 20, 10:00 a.m., Baltimore Convention Center
 - Speakers
 - Gov. Moore/Sec. Anderson, Baltimore Mayor Brandon Scott, Al Hutchinson, CEO Visit Baltimore, Matthew Campbell, ED Baltimore Convention Center, Ruth Toomey, ED Maryland Tourism Coalition
 - Tour of Convention Center following event
- Maryland Tourism Professional of the Year
- Other Experiences Throughout the Month
 - Maryland in a Day
 - Various DMO partners have experiences planned



Rich Gilbert Travel Trade

IPW 2024 Preparation

Maryland & Capital Region USA

- May 3-7 in Los Angeles, CA
- Appointments with ____ buyers from our primary international markets of Canada, United Kingdom, German, French markets, plus domestic inbound receptive operators
- Maryland participating partners: National Aquarium, National Harbor, Visit Baltimore & Visit Frederick



Global Travel Exchange

Maryland & Capital Region USA

- A smaller, regional IPW
- September 16-18, 2024 in Charlottesville, VA
- Appointments with 40-45 buyers from our primary international markets of United Kingdom, German, French markets, plus domestic inbound receptive operators



Upcoming Meeting Dates

Friday, June 7, 2024 Time: 10:00 am - 12:00 pm

Agenda: Marketing Plan presentation / Chair Nomination Committee forms

Location: Meritus Park (formerly Municipal Stadium (Hagerstown)

274 E Memorial Blvd, Hagerstown, MD 21740, USA

Note: Same day and place as MDMO mtg.

Friday, September 13, 2024 Time: 10:00 am - 12:00 pm

Agenda: Regular Update Meeting

Location: TBD

Friday, November 1, 2024 Time: 10:00 am - 12:00 pm

Agenda: Annual Meeting with Chair/Executive Committee Elections

Location: TBD



THANK YOU
