



**MARYLAND TOURISM DEVELOPMENT (MTDB) BOARD
QUARTERLY MEETING MINUTES - **APPROVED**061325**

January 9, 2025 | 10:00 a.m.- 12:00 p.m.

7795 Arundel Mills Blvd,

Hanover, MD 21076

MEMBERS PRESENT

Al Spence, A.S. Midway Tours
Ben Seidel, Real Hospitality Group
Ashley Chenault, Charles County Tourism
James Mathias, University of Maryland
Eastern Shore
Chris Riehl, Rent-A-Tour
Sandy Turner, Cecil County Tourism
Dave Ferraro, Friends of Patapsco
Valley State Park
Andrew Frank, Cap Advisory
Cassandra Vanhooser, Talbot County
Department of Economic Development and
Tourism

MEMBERS ABSENT

Gerardo Martinez, Wild Kid Acres, LLC
Leverne McElveen, Levern McElveen &
Associates, LLC
Juan Carlos Linares, Federal Realty
Investment Trust
Del. Wayne Hartman, Maryland House of
Delegates
Heather Shaffer Braue, CFG Bank Arena/Oak
View Group
Del. Melissa Wells, Maryland House of
Delegates
Shelonda Stokes, Downtown Partnership
Tonya Fitzpatrick, Esq., World Footprints,
LLC
Melonie Johnson, MGM National Harbor
Rick Howarth, Levy Restaurants
Robert Arthur, The Ivy Hotel
Nancy King, Maryland State Senate

EXECUTIVE COUNCIL

Ruth Toomey, Maryland Tourism Coalition
Graham Whaples, Maryland Sports

DESTINATION MARYLAND ORGANIZATIONS (DMO)

Kristen Pironis, Visit Annapolis and Anne
Arundel County
Kelly Groff, Visit Montgomery

Jodi Marschhauser, Harford County Department
of Economic Development
Robert Zimmeroff, Caroline County Economic
Development & Tourism

COMMERCE STAFF:

Liz Fitzsimmons, Managing Director

Brian Lawrence, Advertising and Content
Marci Ross, Tourism Development
Rich Gilbert, Travel Trade

Rianna Wan, Research
Daesha Elliott, Advertising and Content
Greg Bird, Advertising and Content

GUEST SPEAKER:

Rob Levine, Marriner Marketing

I. CALL TO ORDER

- a. Board Chair, Ben Seidel called the meeting of Thursday, January 9, 2025, to order and noted that the meeting is being recorded. Seidel called for a motion to approve the minutes of 11/13/24. A motion to approve was made and seconded and the minutes were unanimously approved. MTDB member introductions followed with brief updates on the General Assembly Session and the Baltimore Convention Center Task Force. Liz Fitzsimmons, Managing Director with the Maryland Office of Tourism Development (OTD), emphasizes the significance of advocating during legislative session for investment in tourism as a strategic solution to address budgetary deficits. Seidel provided an update on the most recent Convention Center Task Force meeting, where discussions primarily focused on funding sources and ownership. Finally, Fitzsimmons announces that Marci Ross will serve as the Acting Managing Director of OTD upon her retirement in February.

II. EXECUTIVE DIRECTOR REPORT - Liz Fitzsimmons, Managing Director, Office of Tourism & Film

- a. Fitzsimmons presents several key topics:

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

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.

Three Measurable Objectives = One Outcome

MARKET EXPANSION

- Further promotional pushes in Cleveland, Pittsburgh and New York metro

LEVERAGING PARTNERSHIPS

- Working with the private sector 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 = CUSTOMERS SPENDING TIME AND MONEY IN OUR STATE

Maryland's Leading Five (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

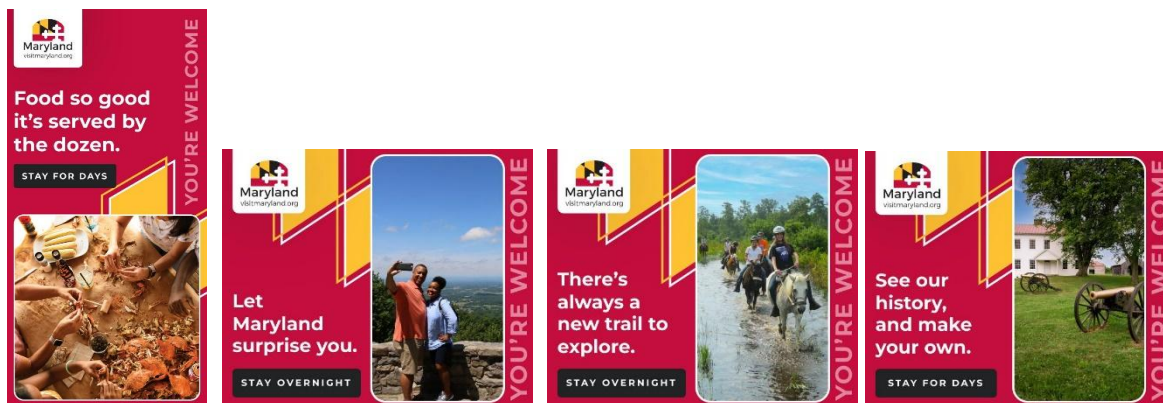
b. AGENCY OF RECORD UPDATE – Rob Levine, Marriner Marketing

Spring 2025 Advertising Campaign

- The Spring 2025 campaign will build on the success from the 2024 campaign which delivered \$85.3M in revenue and \$40:1 ROI
- The campaign objective is to increase multi-night hotel stays and awareness of Maryland
- Advertising will run from March through August
- The campaign will promote summer travel in Maryland and Maryland's key differentiators
- New You're Welcome creative refresh
- Two new TV spots
- Media outlets include Broadcast TV, Connected TV, online video, radio, digital display, out-of-home advertising
- Total media: \$4MM
- The POIs/Geofencing data is captured domestically but not internationally.

You're Welcome Creative Refresh

- Refreshed banner creative in two different sizes:



Two New TV Ads

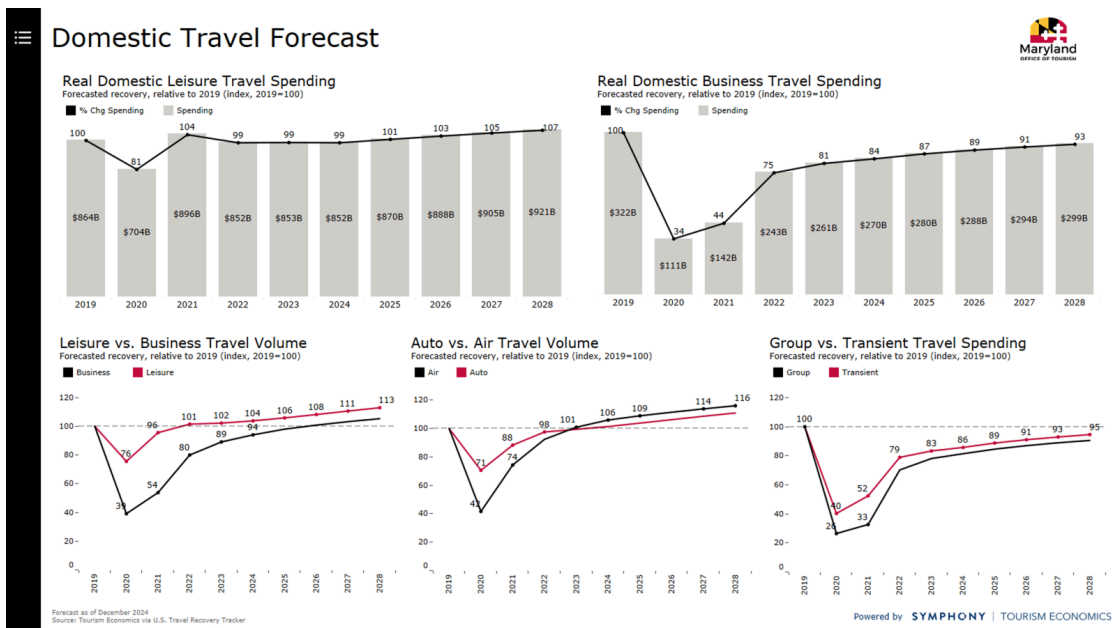
- We refreshed our broadcast rotation this year with two new spots that showcase other variety of activities within the state



c. RESEARCH UPDATES - Liz Fitzsimmons, Managing Director, Office of Tourism & Film

Fitzsimmons presented the Office of Tourism's report card:

Domestic Economic Forecast



Scenario Forecast for Maryland's Visitor Economy (up to 2026)

- In our Upside scenario, near-term inflation prospects improve further. Core inflation proves less sticky than expected and oil prices ease as fears of Middle East escalation fade. Inflation expectations edge lower as a result. Central bank caution fades as inflation quickly returns to target. Financial markets strengthen, with investors surprised by the speed and scale of near-term policy easing.
- In our Baseline scenario, we assume economic growth slows modestly in 2025 where U.S. gross domestic product (GDP) grows 2.6%, versus 2.8% growth in 2024. We expect inflation to moderate in the coming months which will prompt the Fed to cut rates three times in 2025. However, persistent inflation in late 2024, combined with robust consumer spending and a healthy labor market, reduces the urgency to stimulate the economy through rate cuts, thus the risk is to fewer cuts than currently expected. Household finances are generally in good shape, but the regressive nature of inflation and high interest rates are disproportionately pressuring low-income households to curtail spending.

- In our Downside scenario, core inflation proves stickier than expected. At the same time, an escalation of the Israel-Hamas war triggers a historically significant degree of disruption to global oil supply. Oil prices spike, equity markets decline, and central banks pause policy easing. Real incomes are squeezed, weighing on consumption.

Key indicators in Maryland's hotel sector

Levels	2019	2020	2021	2022	2023	2024	2025	2026	Relative to 2019							
			Room revenue (millions)						2020	2021	2022	2023	2024	2025	2026	
			Room revenue													
Upside	\$2,319	\$1,163	\$1,810	\$2,302	\$2,493	\$2,570	\$2,801	\$2,939	-50%	-22%	-1%	8%	11%	21%	27%	
Baseline	\$2,319	\$1,163	\$1,810	\$2,302	\$2,493	\$2,565	\$2,683	\$2,788	-50%	-22%	-1%	8%	11%	16%	20%	
Downside	\$2,319	\$1,163	\$1,810	\$2,302	\$2,493	\$2,559	\$2,555	\$2,665	-50%	-22%	-1%	8%	10%	10%	15%	
			Room demand (millions)									Room demand				
Upside	18.9	11.7	15.5	17.3	17.8	18.1	18.8	19.2	-38%	-18%	-9%	-6%	-4%	0%	2%	
Baseline	18.9	11.7	15.5	17.3	17.8	18.1	18.4	18.7	-38%	-18%	-9%	-6%	-4%	-2%	-1%	
Downside	18.9	11.7	15.5	17.3	17.8	18.0	17.9	18.3	-38%	-18%	-9%	-6%	-4%	-5%	-3%	

This workbook contains three forecasts for Maryland. Economic scenarios are based on Oxford Economics' December 2024 US Outlook (released Dec 10)

November 2024 Maryland Lodging Performance

- November 2024 presented mixed results for the state's lodging sector. Hotel demand grew by 1.3% YOY, with supply holding steady, leading to 1.3% increase in Occupancy, which reached 63%. Room rate averaged at \$144 for the month reflecting a 1.5% YOY growth, while total revenue rose to \$2.4 billion, a 2.8% YOY increase.

Source: STR & Tourism Economics

STR data through November 2024

MARYLAND MONTHLY HIGHLIGHTS — NOVEMBER 2024 vs NOVEMBER 2023					
57.4% Occupancy 0.8%	\$131.13 ADR 1.2%	\$75.29 RevPar 2.0%	Room Rev 1.9%	Room Supply -0.1%	Room Sold 0.7%

MARYLAND CALENDAR YEAR TO DATE HIGHLIGHTS THROUGH NOVEMBER 2024					
62.9% Occupancy 1.3%	\$143.60 ADR 1.5%	\$90.39 RevPar 2.8%	Room Rev 2.8%	Room Supply -0.0%	Room Sold 1.3%

CURRENT MONTH PERCENT CHANGE NOVEMBER 2024 vs NOVEMBER 2023						
GEOGRAPHY	Occ %	ADR	RevPar	Room Rev	Room Supply	Room Sold
Baltimore City	-1.3	7.5	6.0	3.6	-2.3	-3.6
MD Western Region	-4.3	0.8	-3.6	-8.1	-4.7	-8.8
MD Capital Region	-1.8	-0.5	-2.2	-2.2	0.0	-1.7
MD Central Region	2.9	2.4	5.3	5.5	0.1	3.0
MD Southern Region	0.5	4.5	5.1	5.1	0.0	0.5
MD Upper Eastern Shore	-0.5	-1.3	-1.8	-1.8	0.0	-0.5
MD Lower Eastern Shore	3.6	4.4	8.2	8.8	0.5	4.2

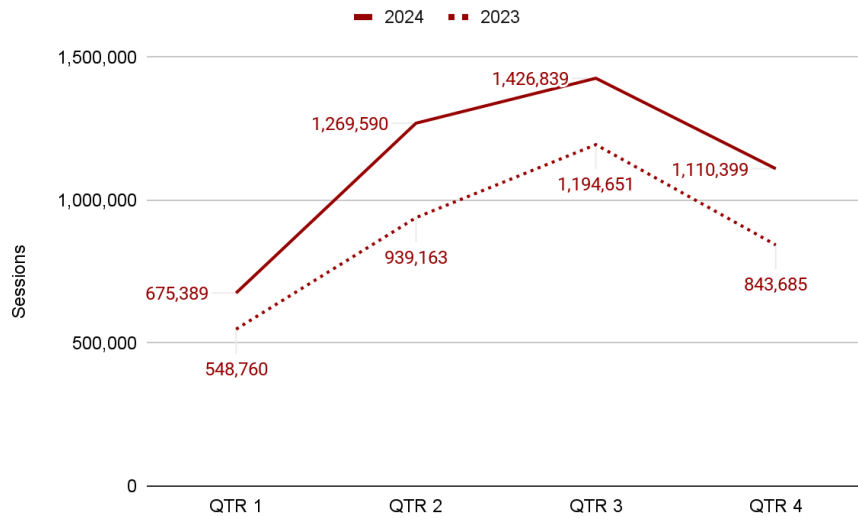
PERCENT CHANGE CALENDAR YEAR TO DATE 2024 vs 2023						
REGIONS	Occ %	ADR	RevPar	Room Rev	Room Supply	Room Sold
Baltimore City	5.1	5.0	10.3	8.1	-2.1	2.9
MD Western Region	-5.0	2.4	-2.7	-5.4	-2.8	-7.7
MD Capital Region	-0.2	1.7	1.6	1.4	-0.1	-0.3
MD Central Region	4.4	2.2	6.7	6.0	-0.7	3.7
MD Southern Region	-0.4	3.0	2.6	2.6	0.0	-0.4
MD Upper Eastern Shore	2.0	-0.2	1.7	9.7	7.8	9.9
MD Lower Eastern Shore	-3.2	-0.8	-4.0	-3.5	0.6	-2.7

2024 Site Visitation (2024 vs 2023)

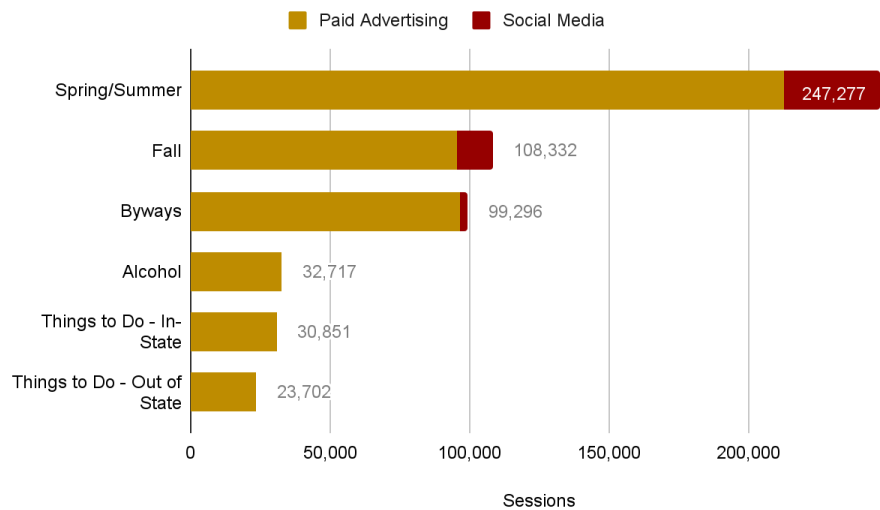
- Users: 3,552,229 **+24%**
- New Users: 3,540,058 **+24%**
- Sessions: 4,521,958 **+29%**
- Engaged Sessions: 2,791,383 **+25%**
- Views: 7,063,026 **+20%**
- Average Session Duration: 2m 13s **-6%**
- Engagement Rate: 61.7% **-3%**

Site Visitation by Quarter

- Visitation increased every quarter with the highest increase in Q2 (Apr. 1 - Jun. 30) with 35%. The second highest increase being Q4 (Oct. 1 - Dec. 31) with 32%.

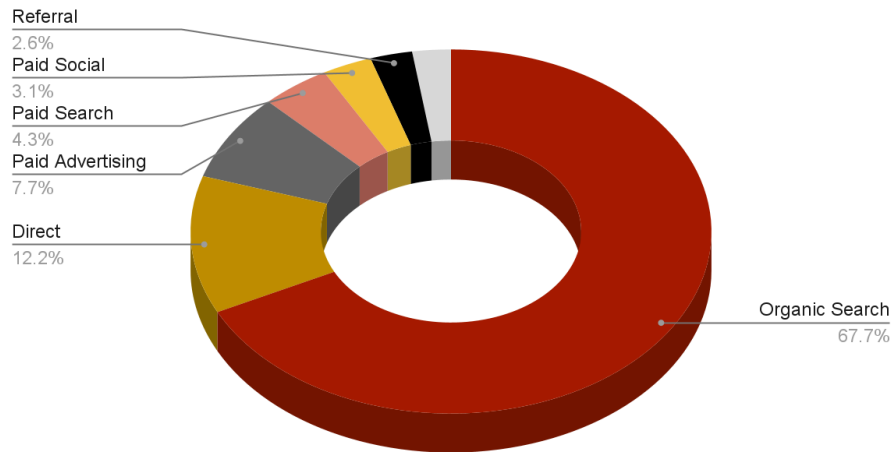


Top Campaigns (Jan. 1 - Dec. 31, 2024)



Where is the Traffic Coming From? (Jan. 1 - Dec. 31, 2024)

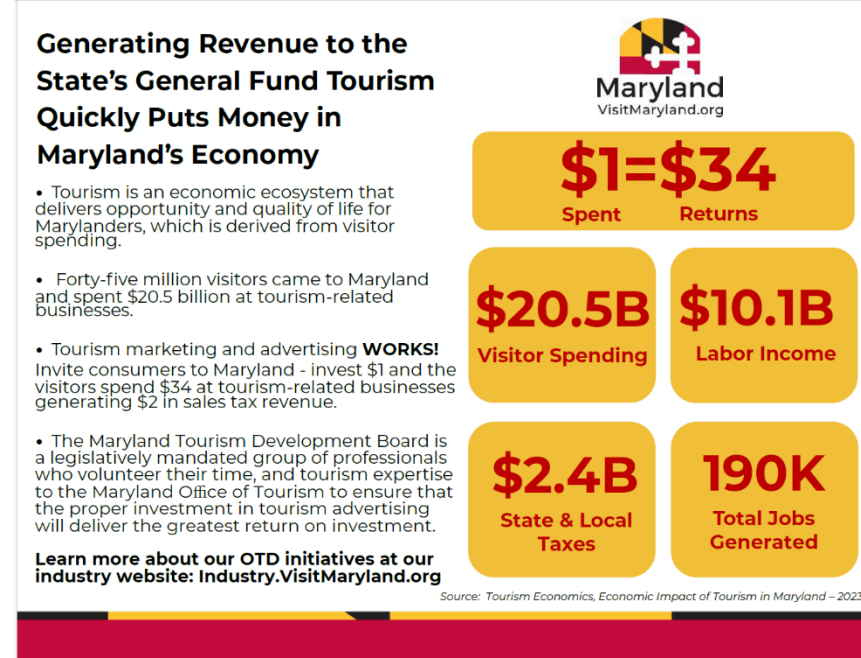
- Organic Search generated more than half of the total visitation for 2024.
- Visitation from organic search and paid digital advertising increased nearly 25% year over year.
- Visitation from paid social media quadrupled YoY.



Important Dates:

- January 8, 2025 - General Assembly Session Begins
- January 15, 2025 - Governor introduces Budget Bill
90 Days from Start of Session Until the End
- April 7, 2025 - Adjournment “Sine Die”
- Fitzsimmons explains the annual budget process, the dire need for advocacy of the tourism budget based on economic impact, and the role board members play in the process.
- Board members play a crucial role during this time by supporting and defending the budget.
- **February 26, 2025 - 1:00 p.m. - 4:00 p.m.**
 - House Appropriations - Education and Economic Development Subcommittee
 - Committee membership
 - Chair - Smith, Stephanie - District 45 - Baltimore City - Democrat
 - Vice Chair - Harris, Kevin M.- District 27A - Charles and Prince George's counties - Democrat
 - Forbes, Catherine M. - District 43B - Baltimore County-Democrat
 - Ghrist, Jefferson L. - District 36 - Kent, Queen Anne's, Cecil, and Caroline counties - Republican
 - Wolek, Sarah - District 16 - Montgomery County – Democrat
- **March 3, 2025 - 1:00 p.m. - 3:00 p.m.**
 - Senate - Budget and Tax - Education, Business and Administration Subcommittee
 - Committee membership
 - Chair - King, Nancy J. - District 39 - Montgomery County - Democrat
 - Bailey, Jack - District 29 - Calvert and St. Mary's counties - Republican
 - Benson, Joanne C. - District 24 - Prince George's County - Democrat
 - Corderman, Paul D. - District 2 - Washington and Frederick counties - Republican

Quick Talking Points for “Convos” with Elected Officials



d. TOURISM DEVELOPMENT - Marci Ross, Senior Assistant Director, Office of Tourism & Film

DMO Grant Program

- FY25 Next Steps:
 - o 24 of 25 Grant Application Kits have been executed; Reimbursement Phase is underway
 - o Qualifying Expenditure Report training complete; Report forms sent to DMOs, Reports are due 3/31/25; QERs used to calculate FY26 awards
 - o OTD & DMOs kicked-off a future -facing discussion on 10/18; Timeline is set for FY26 potential policy changes

Leveraging Federal Funding Partnerships

- **National Park Service Chesapeake Gateways Grant:**
 - o A new 5-year cooperative agreement is under development; execution anticipated by end of FY25
 - o Subsequent task orders will be developed creating new products and experiences inspiring multi-night travel
 - o OTD is presenting at two destination development workshops funded in part with EDA funds OTD granted
- **Federal Highway Administration:**
 - o **\$824K Marketing Maryland Scenic Byways Grant Project -** Implementation is underway for four sub-projects; Social Media campaign plan is being finalized for 4/5/25 launch
 - o **Cape to Cape Byway/Driving Tour -** Product development and preliminary marketing discussion phases are underway; Marketplace ready by 4/5/25

- o **Federal Highway Administration Grant Applications Submitted**
 - C&O Canal Byway Corridor Management Plan & Implementation Project
 - Maryland's Chesapeake Country All-American Road Tourism Information Project

e. **STRATEGIC PARTNERSHIPS/PR/SOCIAL MEDIA - Liz Fitzsimmons, Managing Director, Office of Tourism & Film**

Public Relations Strategic Goals

- To inspire multi-night travel through media placement and exposure through local, national and international outlets, FAMS, event support and social media.
- To procure placements on local, regional, national and international media outlets. Sample Media Outlets include
 - o Garden and Gun
 - o Southern Living
 - o Conde Nast Traveler
 - o Travel and Leisure
 - o Major Broadcast Outlets
- Upcoming International media initiatives
 - o UK Mission: March 16-22, 2025
 - o Placements and FAMS with 4 PR agencies abroad including UK, Germany, France, Canada

Recent Media Coverage Successes

- Recent sample coverage from local, regional, national and international.
- Local Coverage: Resulted from a pitch for the “Where’s Marty?” series; features Duck Drop in Havre de Grace and highlights other unique NYE celebrations.
- International Coverage: Direct result of the recent LGBTQ+ FAM along with What’s New pitching; highlights charming town of Frederick and new Visitation Hotel.
- [Unique New Years Eve Celebrations](#)
 - o Outlet: WJZ - “Where’s Dennis?”
 - o Audience: 3 Broadcast Segments: 65,000+ Online: 48+ million
- [In Need of a Relaxing Vacation? Try a Sleepy Staycation in the DC-Area](#)
 - o Outlet: Washingtonian
 - o Audience: Online: 54,000+
- [Our 14 Favorite Southern Layer Cakes With Unique Stories Behind Them](#)
 - o Outlet: Southern Living
 - o Audience: Online: 336,900+
- [The best thing to do in every US state in 2025](#)
 - o Outlet: The Sunday Times UK
 - o Audience: Print + Online: 3.4+ million

Public Relations Support Projects

- Significant Anniversaries/Notable Events:
 - o 2025
 - 60th Anniversary of Assateague Island National Seashore (Berlin, MD)
 - 100th Anniversary of Deep Creek Lake
 - 150th Anniversary of Ocean City

- 150th Anniversary of Preakness Stakes (Baltimore City)
- 175th Anniversary of the completion of C&O Canal
- o 2026
 - America's 250th Anniversary

Social Media Audience

- 322.1K total social media Following (Facebook, Instagram, Threads, X (formerly Twitter), Pinterest, and YouTube)
- Facebook: 107.9K
- X: 56.6K
- Instagram: 130.3K

Social Media Strategy 2025

- In Q1, the Maryland Office of Tourism will expand its online reach by joining two platforms:
 - o LinkedIn, to enhance industry communication.
 - o BlueSky, a new rapidly growing social app to compete with X (formerly Twitter).
- April to October 2025, the Maryland Office of Tourism will launch a robust social media advertising campaign to promote the state's 18 scenic byways.
 - o Scenic byways will be featured on our social media platforms, strategically timed to align with themed holidays or the season on Wednesdays (#WanderlustWednesday) and Sundays (#ScenicSunday).
 - o These posts will inspire and educate audiences about the accommodations, attractions, restaurants, and shopping experiences along each byway.

f. MARKETING UPDATE – Brian Lawrence, Assistant Director, Office of Tourism & Film

RFP Updates

- **Publications:** Awarded to Miles Partnership; received BPW approval on 10/30
- **Digital/Website:** Awarded to Mojo; awaiting BPW approval on 1/29
- **Video Production:** Vendor selected; awaiting delivery of contract for signatures; awaiting BPW date

Advertising Updates

- 2024 'Welcome Home for the Holidays/Winter' digital campaign continues to run through February 2025:
- Active outreach for Deals & Discounts now part of both Holiday and Winter campaigns

g. TRAVEL TRADE UPDATE – Rich Gilbert, Manager, Office of Tourism & Film

Upcoming Events

- **American Bus Association Marketplace**
 - o Philadelphia, PA:
 - o One-on-One appointments (2 sets)
 - o Maryland Trade Show booth
 - o Marketplace Reception - will feature some type of Maryland fare
- **Motorcoach Expo**

- o Oklahoma City
 - o February 20-23, 2025
 - o Booth display & seminar speaker
- **Brand USA - Connect Canada East**
 - o Toronto & Montreal
 - o April 28-May 2, 2025
- **IPW**
 - o Chicago, IL
 - o June 14-18, 2025, in Chicago, IL
 - o Appointments with buyers from our primary international markets of Canada, United Kingdom, German, French markets, plus domestic inbound receptive operators

III. Overall Updates - Liz Fitzsimmons, Managing Director, Office of Tourism & Film

- The board is mandated to meet four times a year
- There are attendance reports
- A spring meeting to set up for the marketing plan
- A meeting in June, which is the approval of the budget
- A fall meeting to get in motion the board nominations
- Board elections in November

IV. Reports from the Industry

- Maryland Tourism Coalition - **Ruth Toomey**
- Maryland Association of Destination Marketing Organizations – **Cassandra Vanhooser**

Marci Ross presents Fitzsimmons with flowers celebrating her leadership and service as OTD's Managing Director.

Ben Seidel closes with a motion to adjourn the meeting.

V. Adjournment

Upcoming MTDB meeting

A Google Poll will go out in consultation with Acting Managing Director, Marci Ross and Board Chair, Ben Seidel.

Announcing



FRIDAY, February 14, 2024

Rams Head on Stage
Annapolis, MD

11:00 am - 1:30 pm