



*Montgomery, MD*  
VISIT MONTGOMERY

# INDUSTRY UPDATE MARCH 2021

# TODAY'S AGENDA



**Welcome**  
**Lodging Monitor**  
**HCER Workgroup**  
**GBAC STAR**  
**Marketing Programs**  
**Advertising Opportunities**  
**Travel Sentiment**  
**Groups & Meetings Update**  
**Sports Tournaments**



The Dentzel Carousel at Glen Echo Park is celebrating 100 years in 2021.

# HELLO!



**Kelly Groff**  
President & CEO



**Cory Van Horn**  
Director of Marketing



**Leticia Engel**  
Marketing Manager



**Leila Beltramo**  
Destination  
Sales Manager



**Lee Callicutt**  
Destination  
Sales Manager

# COVID-19 Recovery Timeline



Visit Montgomery  
Initiatives

**MARCH**

**20th**  
VM launched  
MoCo Eats  
To-Go Guide

**APRIL**

**1st**  
Soft launch of  
Tastemakers  
Trail to  
support craft  
beverage  
producers

**MAY**

**5th**  
Launched  
See You  
Soon  
campaign  
with  
partner  
video

**16th**  
Launched  
MoCo Trail  
Guide

**JUNE**

**6th**  
HCER  
workgroup  
created

**30th**  
Industry Update  
Webinar: Moving  
the Needle Forward  
on Your Sales  
Recovery Plan

**JULY**

**30th**  
VM released a  
series of  
Together &  
Strong  
Montgomery  
County masks

**AUGUST**

**7th**  
VM partnered  
with  
Montgomery  
Parks to launch  
MoCo Eats: Picnic  
in the Park

**SEPTEMBER**

**9th**  
VM worked  
with MCEDC  
to develop  
#MaskUpMoco  
campaign

**6th**  
VM launches  
Let's Go There  
campaign

**11th**  
VM released  
GBAC STAR  
Accreditation

COVID Highlights/  
Govt Initiatives

**12th**  
Pandemic  
Shutdown

**30th**  
Maryland  
Stay-at-Home  
Order

**31st**  
Hotel Subsidy  
Program  
\$25 per night  
Health Care  
Workers

**10th**  
Montgomery  
County  
launched site  
for PHEG

**23rd**  
County Council  
appropriated  
\$3.25m to  
support arts  
and humanities

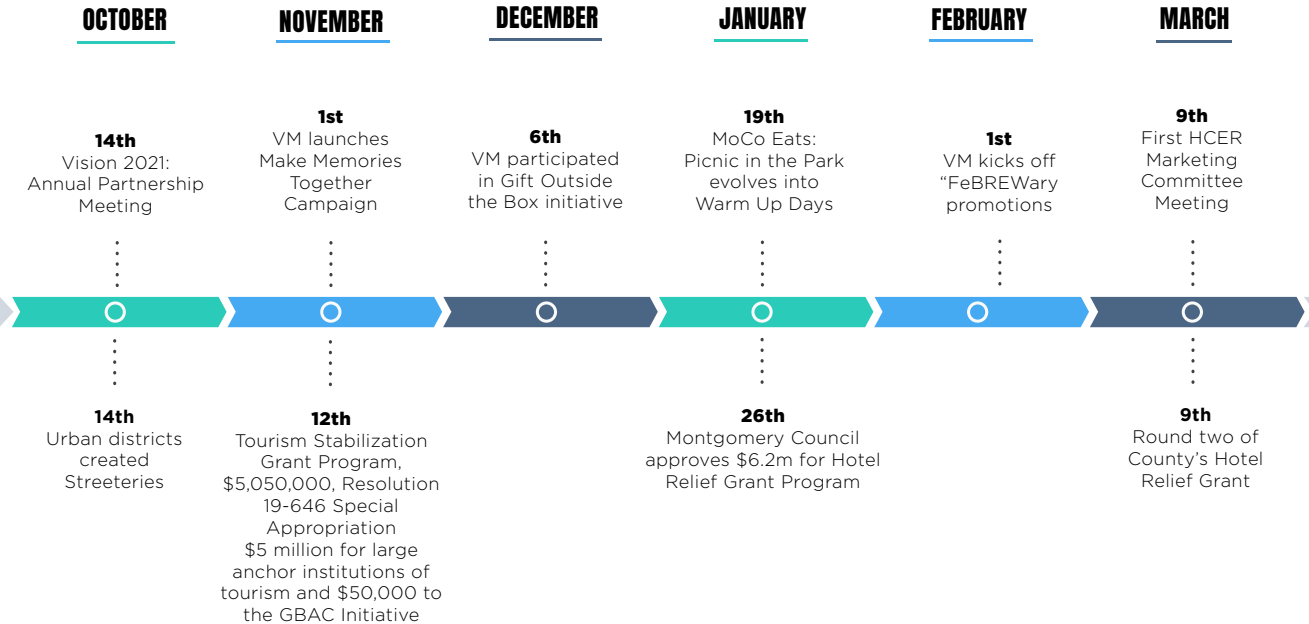
**24th**  
County Executive  
Order recategorizes  
soccer to medium-risk  
sport and permit  
museums, art galleries  
and bowling alleys to  
reopen

# COVID-19 Recovery Timeline



Visit Montgomery  
Initiatives

COVID Highlights/  
Govt Initiatives







# LODGING MONITOR

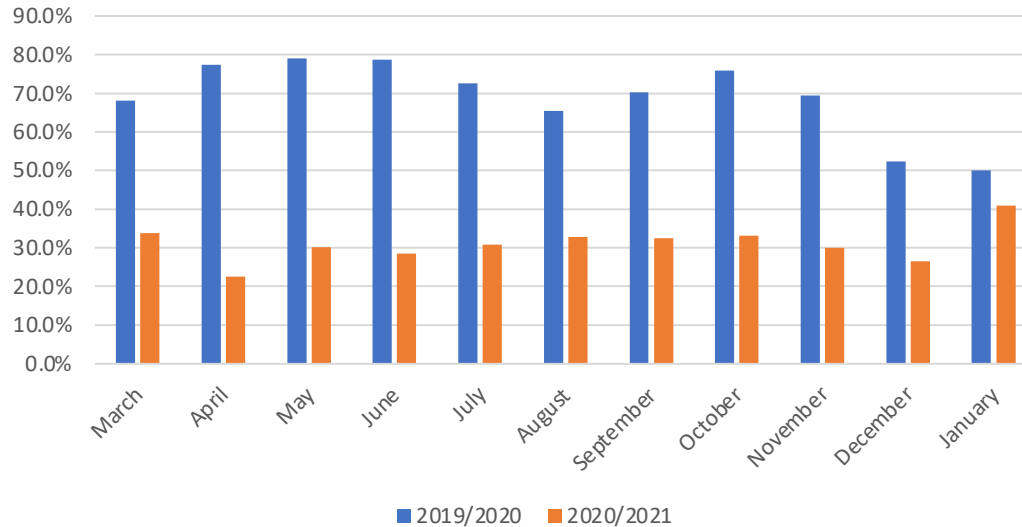
Hotel & Airbnb

Hyatt Regency in Bethesda

# HOTEL OCCUPANCY & AVERAGE DAILY RATE



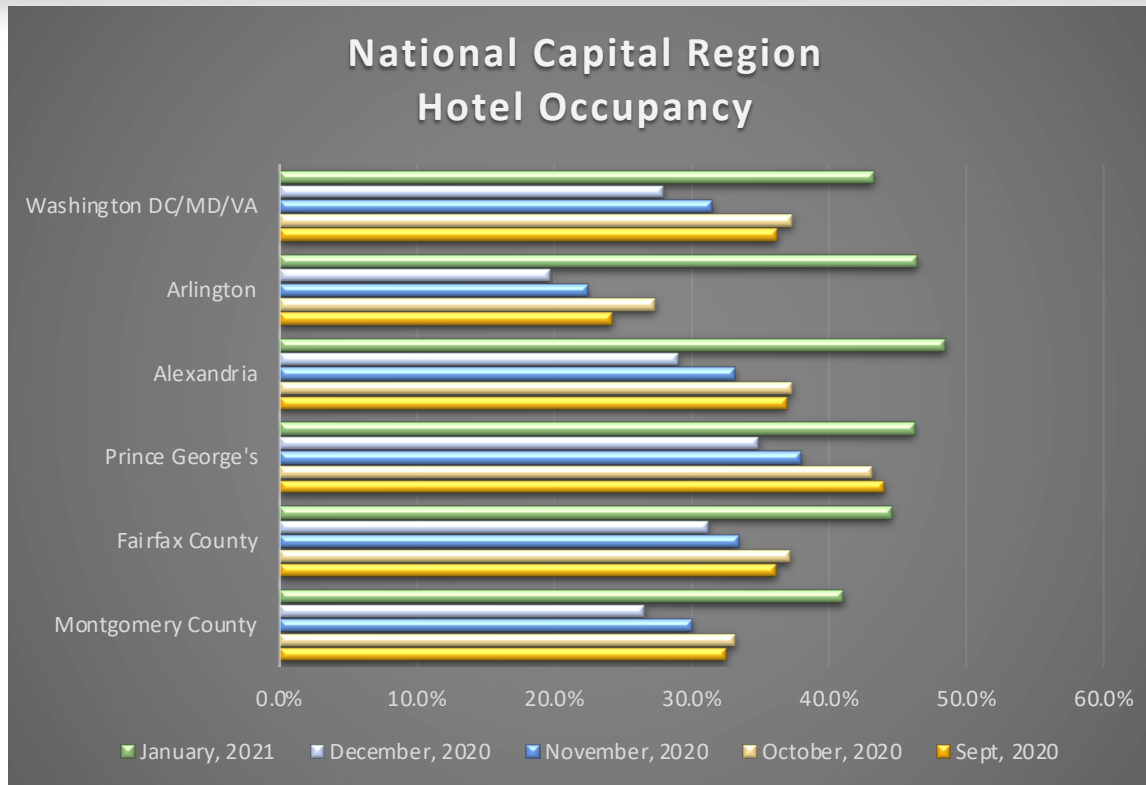
Montgomery County - Hotel Occupancy  
March 2020 - January 2021



## Average Daily Rate

- July: \$91.26
- August: \$90.83
- September: \$88.23
- October: \$89.13
- November: \$87.44
- December: \$81.75
- January 2021: \$97.19

# COMMUNITY HOTEL OCCUPANCY



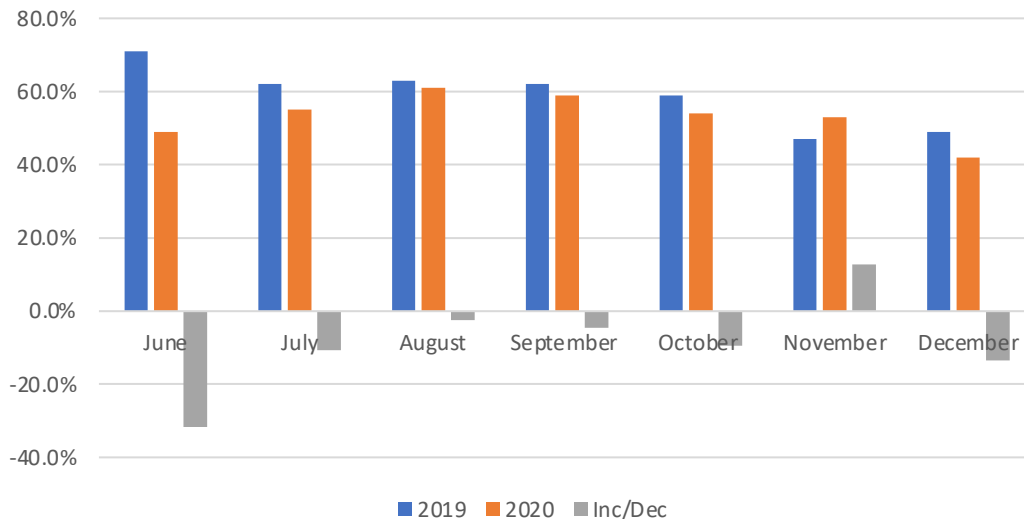
Gaylord Hotel in  
National Harbor  
remains closed.



# SHORT TERM RENTALS



Airbnb Properties - Montgomery County, MD  
All Property Types



December 2020 occupancy at Airbnb rentals was 42%, this is a -13.5% decline OPY.

Average occupancy at Airbnb from March – December was 52.2%, this is a -7.2% decline.

# HCER Working Group



## Recovery Work Group Hospitality/Culture/Recreation/Entertainment (HCER)

### Workgroup Mission:

Hospitality, Culture, Entertainment & Recreation (HCER) Mission Area is to guide hospitality businesses through COVID-19 re-opening phases and beyond to become operational and begin generation of revenues to create a robust hospitality, arts, and tourism economy.

A HCER Marketing Sub Committee was created in February 2021 to support the industry with recovery marketing efforts.

# CURRENT GBAC STAR PARTICIPANTS



## 32 Participants for Full Accreditation

Hotel, Bed and Breakfast and Conference Centers: 21

Performance & Arts: 9

Sporting Complex: 1

Recreational Facility: 1





# MARKETING UPDATE

Promoting to Residents + The Region



**223,240 Sessions**

-20.80% OPY

**629,902 Page Views**

-14.28% OPY

**2.67 Pages Per Session**

+8.24 + OPY

# CONTENT DEVELOPMENT

Cherry Blossom Guide

National Parks & Historic Sites

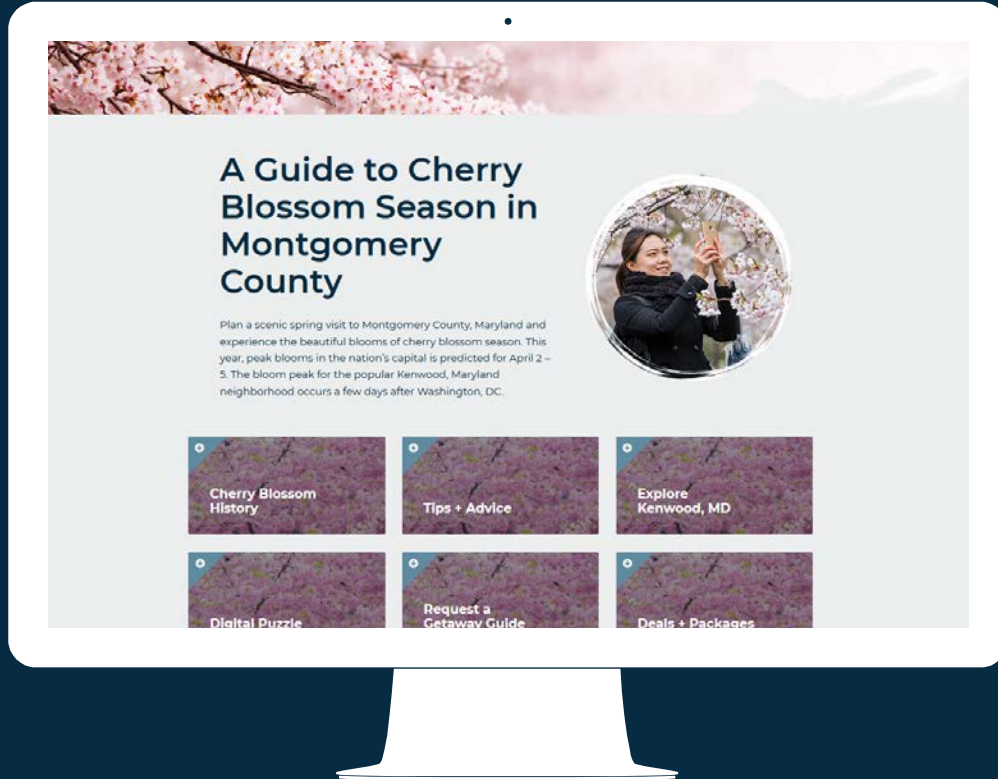
African American Heritage Sites

Social Celebrations & Weddings

Promotions Page

Events Calendar

Arts & Cultural Experiences





# Top Social Media & Website Metrics July-Feb



## Web Pages

Page Views

Plan Ahead (Let's Go There Campaign) **73,880**

Events Calendar **60,756**

MoCo Eats **49,179**

Holiday (Make Memories Campaign) **28,443**

Home **25,106**

Tastemakers Trail **18,731**

## Blog Articles

Page Views

15 Ways to Eat and Drink Outdoors **19,598**

Everything You Need to Know About the Sunflower Fields **8,082**

The 12 Most Instagrammable Spots **6,951**

Great Holiday Lights Displays **6,913**

Best Places to See Fall Foliage **6,713**

## Social Posts

Reach

The wait is over! The Comus Inn is now open! **33,837**

Celebrate the Holidays at Cambria **25,200**

Gaithersburg Drive-thru Winter Lights Festival **16,684**

Proof That Fall is the Best Time to Visit Montgomery County **19,167**

Support MoCo Made for the Holidays **17,300**

# UPCOMING CAMPAIGNS



**Total Duration: March 2021 – June 2021**

## Spring Campaign

Designed to resemble a greeting card.  
“Greetings from Montgomery County.”



## Tastemakers

Promote local craft beverage producers through a single tourism trail.



## “Welcome Back/We’re Open”

A campaign for April – June to promote the county’s currently reopening phases. Created in partnership with the HCER Marketing Committee.



## Micro Campaigns

MoCo Eats Week  
Mother’s Day  
Pride Month  
Plan Ahead for Summer

## C&O Canal Experience

Leading a multi-county program to position the C&O Canal National Historical Park as a anchor attraction.

# C&O Canal Regional Marketing Committee



- Partnership between Montgomery, Frederick, Washington, Allegany, MD Tourism, The Canal Trust and National Park Service.
- Developing a C&O Canal Experience Brand.
- Leveraging combined budgets for group advertising buys including AAA World and Washington Post.
- Implemented robust public relations strategy including a virtual media fams.
- Instagram and homepage takeovers for National Park Week in April.

Ranked 8th in USA Today's  
Best National Parks List in 2021

8th Most Visited National Park in  
the United States

Attracted 4.9 Million Visitors in  
2020

43.7% of Park Visits Explore  
Montgomery County  
Communities

## Greetings From MONTGOMERY COUNTY Maryland



Great Falls | Potomac, MD



Hey There,

Today, I took a light stroll to Great Falls along the C&O Canal. Then grabbed a pint on a working horse farm. Tonight I'm going to enjoy the views of Sugarloaf Mountain and try the chef special at The Comus Inn!

*Wish you were here!*



The Comus Inn | Dickerson, MD

Take a break from your screen and point your GPS to Montgomery County, MD - next door to Washington, DC. Try out culinary adventures, play around in nature and explore the arts. Fill your postcard with new experiences or find a unique twist on activities you know and love.

[VisitMontgomery.com/Road-Trip](http://VisitMontgomery.com/Road-Trip)

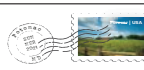


Montgomery, MD  
VisitMontgomery.com



Maryland  
VisitMaryland.org

## Greetings From MONTGOMERY COUNTY Maryland



Hey There,

Today, I hiked along the Potomac River and explored Great Falls, sipped wine at a local vineyard in the Agricultural Reserve and scored great deals at Clarksburg Premium Outlets.

*Wish you were here!*

Take a break from your screen and point your GPS to Montgomery County, MD - next door to Washington, DC. Try out culinary adventures, play around in nature and explore the arts. Fill your postcard with new experiences or find a unique twist on activities you know and love.

[VisitMontgomery.com/Road-Trip](http://VisitMontgomery.com/Road-Trip)



Montgomery, MD  
VisitMontgomery.com



Maryland  
VisitMaryland.org

## Greetings From MONTGOMERY COUNTY Maryland



Hey There,

Today, I biked the towpath in the C&O Canal National Historical Park and sipped wine at a beautiful vineyard in the Agricultural Reserve. Tonight I'm going to stay in a historic Lockhouse along the canal!

*Wish you were here!*

Take a break from your screen and point your GPS to Montgomery County, MD - next door to Washington, DC. Try out culinary adventures, play around in nature and explore the arts. Fill your postcard with new experiences or find a unique twist on activities you know and love.

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Montgomery, MD  
VisitMontgomery.com



Maryland  
VisitMaryland.org

## Greetings From MONTGOMERY COUNTY Maryland



Hey There,

Today, I explored the 93,000-acre Agricultural Reserve, sipped wine at a local vineyard along the Testmakers Trail and scored great deals at Clarksburg Premium Outlets.

*Wish you were here!*

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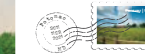


Montgomery, MD  
VisitMontgomery.com



Maryland  
VisitMaryland.org

## Greetings From MONTGOMERY COUNTY Maryland



Hey There,

Today, I explored the award-winning Brookside Gardens, savored a pint at a local brewery and spent the evening at Pike & Rose in North Bethesda.

*Wish you were here!*

Take a break from your screen and point your GPS to Montgomery County, MD - next door to Washington, DC. Try out culinary adventures, play around in nature and explore the arts. Fill your postcard with new experiences or find a unique twist on activities you know and love.

[VisitMontgomery.com/Road-Trip](http://VisitMontgomery.com/Road-Trip)



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VisitMaryland.org



## Greetings From MONTGOMERY COUNTY Maryland



Plan a Road Trip



VisitMaryland.org

## Greetings From MONTGOMERY COUNTY Maryland



Plan a Road Trip



Montgomery, MD  
VisitMontgomery.com



Maryland  
VisitMaryland.org

# Greetings From Montgomery County – Spring Campaign

# UPCOMING ADVERTISING OPPORTUNITIES FOR PARTNERS



**Visit Montgomery Consumer  
Newsletter Ad Spots**

**Spring Social Media Match  
Program**

**AAA Digital and Print Co-Op  
in April/May and June/July.**

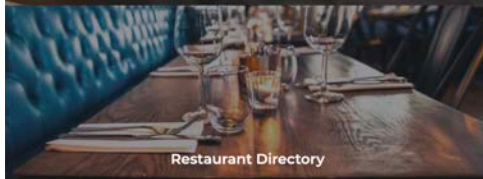


Josiah Henson Museum & Park tells the story about the life and challenges of Reverend Josiah Henson, enslavement in Maryland, and the ongoing struggles of racial equality and justice.

**MOCO  
EATS**

# A Food Lover's Guide

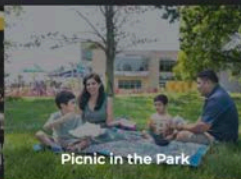
to Montgomery County, Maryland



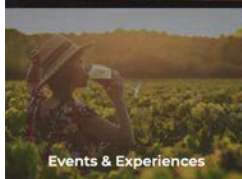
Restaurant Directory



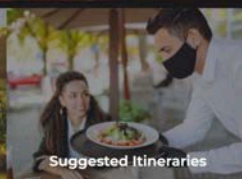
Outdoor Dining



Picnic in the Park



Events & Experiences



Suggested Itineraries



Tastemakers Trail





**MOCO  
EATS**

**PICNIC**  
in  
**the PARK**



A collaboration between Visit Montgomery and Montgomery Parks to help support local restaurants near parks.

Launched in August 2020.

Warm Up Days Program Launched in January 2021

Over 15,000 page views generated promoting businesses since launch.

# MoCo Eats Week

Presented by Visit Montgomery and Montgomery County ABS



All MoCo Food and Beverage Businesses Welcome

Digital Savings Pass for Consumer Check-In

Virtual + In-Person Events Throughout the Week

Self-Guided Itineraries Highlighting Deal Clusters



# TRAVELER SENTIMENT

From Destination Analysts

# KEY FINDINGS TO KNOW



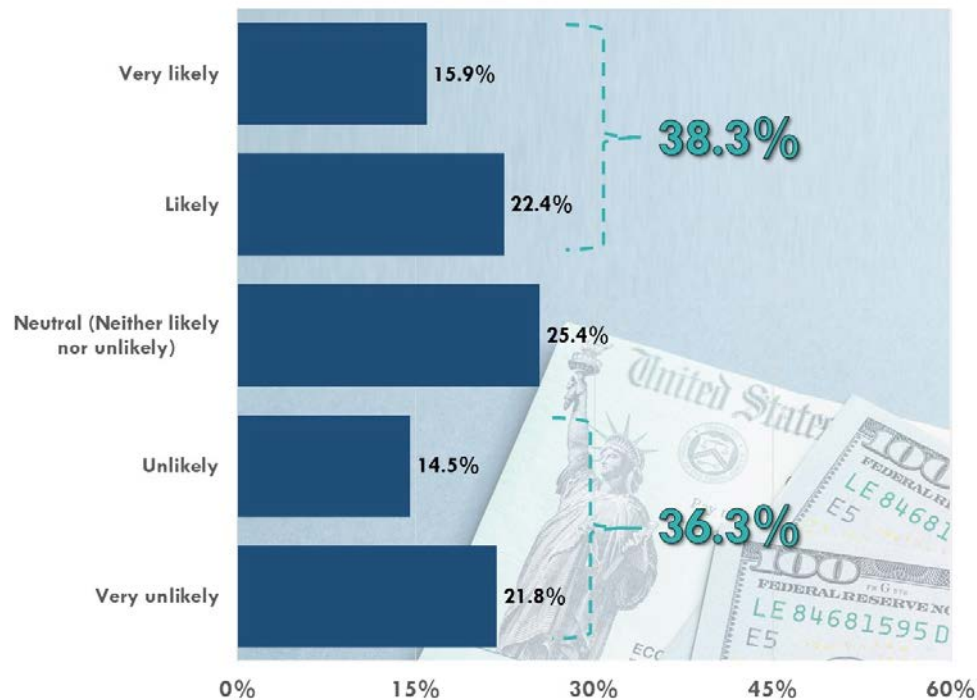
Americans' high concern about the pandemic's impact on our national economy may play a role in their feelings towards tourism in their own communities. Among the 46.1% of American travelers who report they would be happy to see an ad promoting tourism to their town of residence, by far the most common reason for this is that it would help local businesses (64.8%).

Americans began receiving stimulus checks and travel looks to certainly benefit. 38.3% of those who have or are expecting a stimulus check say they are likely to spend some portion of it on leisure travel. This is even more prevalent among Millennial age travelers, who are, in fact, twice as likely as Boomer age travelers to spend their stimulus money on travel.

When asked if the pandemic had changed their opinions about the types of destinations they want to visit for leisure in the future, 41.8% of American travelers said yes. For beach, National Park and other outdoor destinations, this is welcome news as 52.2% of Americans agree they will be visiting these types of destinations more as a result of the pandemic. Urban, entertainment and theme park-focused destinations will face greater challenges in the recovery, as 44.6% of American travelers report they are less likely to visit these places in the next few years because of the pandemic.

*Source: Destination Analysts*

## LIKELIHOOD TO SPEND COVID STIMULUS ON LEISURE TRAVEL AS OF MARCH 21, 2021



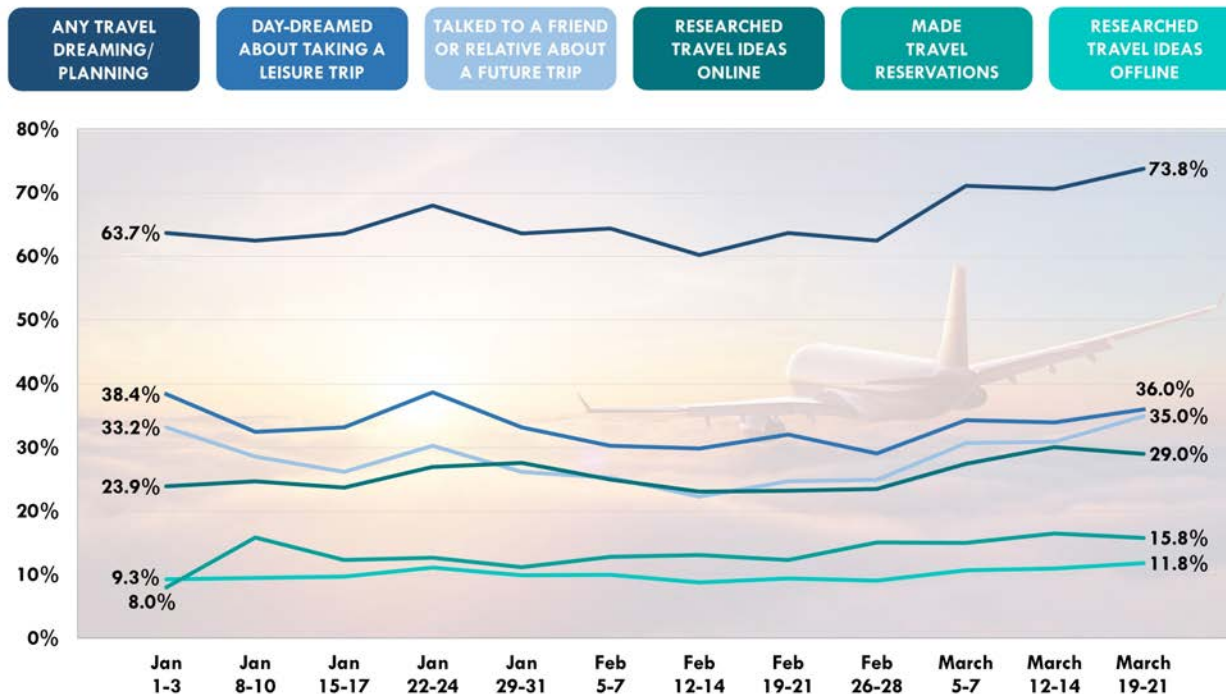
**QUESTION:** HOW LIKELY IS IT THAT YOU WILL SPEND AT LEAST SOME PORTION OF THIS PAYMENT ON LEISURE TRAVEL? (SELECT ONE)

(Base: Wave 54 data. All respondents expecting to receive COVID relief checks, 671 completed surveys. Data collected March 19-21, 2021)



# AMERICAN TRAVEL DREAMING & PLANNING IN 2021

## JANUARY 1—MARCH 21, 2021



**QUESTION:** IN THE PAST WEEK, WHICH OF THE FOLLOWING HAVE YOU DONE?  
(SELECT ALL THAT COMPLETE THE SENTENCE) IN THE PAST WEEK I HAVE \_\_\_\_\_

(Base: Waves 43-54. All respondents, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204 and 1,208 completed surveys.)



A photograph of a group of people at a social gathering. In the foreground, a woman with dark hair and a warm smile is looking towards the right, holding a glass of white wine. She is wearing a light-colored top and a brown scarf. To her left, the back of a blonde woman's head is visible. In the background, other people are blurred, including a man with a beard and glasses. The image is partially covered by a dark blue overlay on the right and a maroon rectangle containing text.

# GROUPS & MEETINGS UPDATE

A Look Ahead



# 43 Leads

21,543 Room Nights | \$4,769,480 Economic Impact

# 12 Bookings

17,924 Room Nights | \$4,090,060 Economic Impact

| Meeting   | Start Date | End Date   | Peak Rms | Total Rms | Attendees |
|---|------------|------------|----------|-----------|-----------|
| Confidential  | 1/6/2022   | 1/8/2022   | 3,500    | 12,730    | 8,000     |
| Annual Meeting  | 1/9/2022   | 1/13/2022  | 5,500    | 23,433    | 10,000    |
| 2022 Capitol Hill VolleyBall Classic                                    | 2/18/2022  | 2/21/2022  | 5,644    | 16,931    | 8,000     |
| Governmental Affairs Conference 2022                                    | 2/27/2022  | 3/3/2022   | 2,600    | 11,490    | 9,000     |
| 2022 Rock & Roll USA Marathon - CareFirst Half Marathon - 5K            | 3/11/2022  | 3/19/2022  | 4,575    | 11,964    | 30,000    |
| American Israel Public Affairs Committee (AIPAC) 2022 Policy Conference | 3/13/2022  | 3/16/2022  | 4,000    | 12,800    | 10,000    |
| American College of Cardiology Annual Scientific Session & i2 Summit    | 4/2/2022   | 4/4/2022   | 11,500   | 45,655    | 25,000    |
| ASCRS•ASOA Annual Symposium & Congress 2022                             | 4/23/2022  | 4/26/2022  | 6,025    | 31,326    | 12,000    |
| Confidential  | 5/10/2022  | 5/13/2022  | 4,177    | 20,251    | 10,000    |
| ASM Microbe   | 6/6/2022   | 6/15/2022  | 6,500    | 31,980    | 15,000    |
| Summer National Conference  | 6/24/2022  | 6/29/2022  | 8,500    | 40,020    | 26,000    |
| 2022 AAPM Annual Meeting & Exposition                                   | 7/10/2022  | 7/14/2022  | 2,550    | 12,500    | 4,500     |
| 2022 Otakon Annual Convention   | 7/28/2022  | 7/30/2022  | 5,348    | 18,441    | 23,000    |
| Confidential  | 8/7/2022   | 8/11/2022  | 2,500    | 11,025    | 4,000     |
| Family Medical Exchange 2022  | 9/14/2022  | 9/25/2022  | 4,000    | 18,360    | 5,000     |
| bbcon 2022  | 9/29/2022  | 10/1/2022  | 3,500    | 12,860    | 5,500     |
| Annual Meeting  | 10/10/2022 | 10/12/2022 | 3,000    | 13,800    | 30,000    |
| Confidential  | 10/16/2022 | 10/19/2022 | 3,500    | 15,715    | 7,000     |
| The Liver Meeting   | 11/5/2022  | 11/7/2022  | 4,000    | 17,560    | 8,000     |
| Confidential  | 11/13/2022 | 11/17/2022 | 3,064    | 13,027    | 1,500     |
| Annual National Convention  | 11/16/2022 | 11/19/2022 | 4,400    | 16,588    | 20,000    |
| Annual Meeting  | 12/4/2022  | 12/6/2022  | 3,000    | 14,220    | 8,000     |
| 22  |            |            |          | 422,676   | 279,500   |

UPCOMING WASHINGTON, DC CITYWIDE CALENDAR 2022



# TOUR & TRAVEL



- Actively pitching Tastemakers Trail as a group tour experience.
- Participating in ABA Marketplace OnDemand – virtual appointments with tour operators – April 13, May 25 and June 8.
- Working marketing on C&O Canal and National Park Itineraries (including C&O Canal, Glen Echo and Clara Barton House).
- We predict that seniors will start to actively travel in small group settings since they are the first to get vaccinated.

# ADAPTING TO NEW EXPECTATIONS FOR CONFERENCES, CONVENTIONS, TRADE SHOWS AND EXHIBITIONS

Many Americans are eager to return to face-to-face meetings and business events when the threat of COVID-19 has passed and it is safe to do so.



**83%**

of Americans working from home say they miss attending in-person meetings and conventions.



**78%**

say they plan to attend as many or more when physical distancing ends.

## WE ARE ENCOURAGING MEETINGS AND EVENTS BUSINESSES TO:

1. Adjust operations, employee practices and public spaces to help protect employees and customers.
2. Consider implementing touchless solutions, where practical, to limit the opportunity for virus transmission while also enabling a positive travel experience.
3. Implement enhanced sanitation procedures specifically designed to combat the transmission of COVID-19.
4. Promote health screenings for employees and isolate workers with possible COVID-19 symptoms and provide health resources to customers.
5. Establish new procedures, aligned with CDC guidance, to use if an employee tests positive for COVID-19.
6. Follow best practices in food and beverage service to promote health of employees and customers.



A red and white soccer ball sits on a green grassy field. In the background, a bright sun is low on the horizon, creating a lens flare effect. A dark, out-of-focus tree trunk is visible on the left side of the frame. The right half of the image is a solid dark blue background.

# SPORTS UPDATE

A Look Ahead

# 2021 YOUTH SPORTS TOURNAMENTS



| Event  | Dates                 |
|--|-----------------------|
| MSI Cherry Blossom Soccer Tournament - CANCELLED | March 19-21, 2021     |
| Bethesda Soccer - Youth - RELOCATED              | April 2-3, 2021       |
| Potomac Memorial Soccer Tournament               | May-21                |
| Mid-Atlantic Cup Soccer                          | June 11-13, 2021      |
| IWLCA (Intercollegiate Women's Lacrosse)         | June 18-20, 2021      |
| Laxin Out Loud Lacrosse Tournament               | June 26-27, 2021      |
| World Series of Youth Lacrosse                   | June 30-July 5, 2021  |
| Main Stage Lacrosse                              | July 7-8, 2021        |
| FLG Lacrosse                                     | July 9-11, 2021       |
| Pinnacle Lacrosse                                | July 16-18, 2021      |
| Athletes Unlimited Lacrosse League               | July 16-August 2021   |
| AU Futures                                       | July 26-July 28, 2021 |
| EDP Soccer Tournament                            | August 21-22, 2021    |
| August Cup Soccer Tournament                     | August 28-29, 2021    |
| Rush For The Cup Soccer Tournament               | September 4-5, 2021   |
| Discovery Cup Soccer Tournament                  | October 8-11, 2021    |
| Bethesda Girls Soccer Tournament                 | November 12-14, 2021  |
| Bethesda Boys Soccer Tournament                  | November 19-21, 2021  |



**THANK  
YOU!**