



Montgomery, MD
VISIT MONTGOMERY

INDUSTRY UPDATE

Summer 2021

TODAY'S AGENDA



- **Welcome**
- **Lodging Monitor**
- **HCER Workgroup**
- **GBAC STAR**
- **Marketing Campaigns**
- **Tourism Development**
- **Travel Sentiment**
- **Groups & Meetings Update**
- **Sports Tournaments**



Capital Crescent Trail



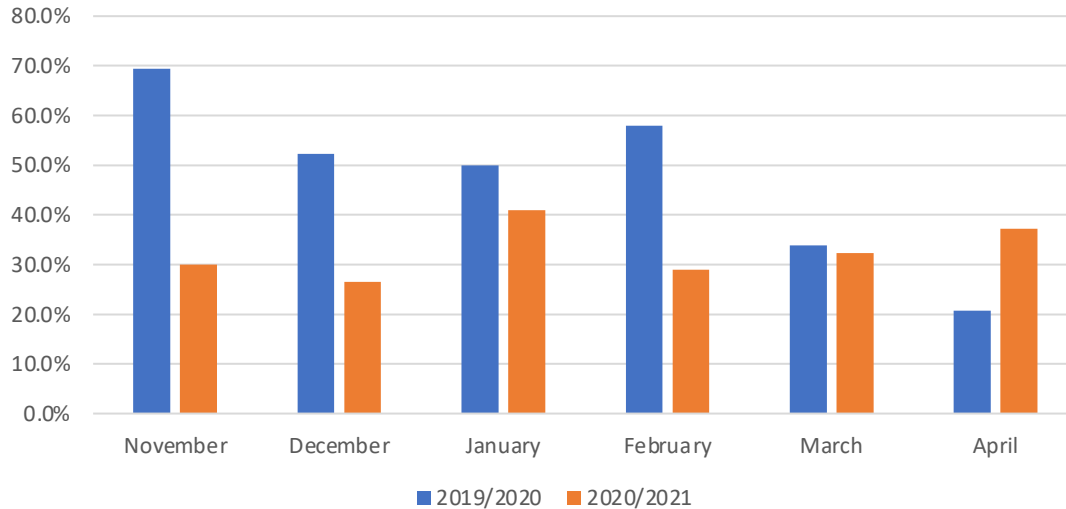
LODGING MONITOR

Hotel & Airbnb

HOTEL OCCUPANCY & AVERAGE DAILY RATE



Montgomery County - Hotel Occupancy
November 2020 - April 2021
Compared to Prior Year



Average Daily Rate

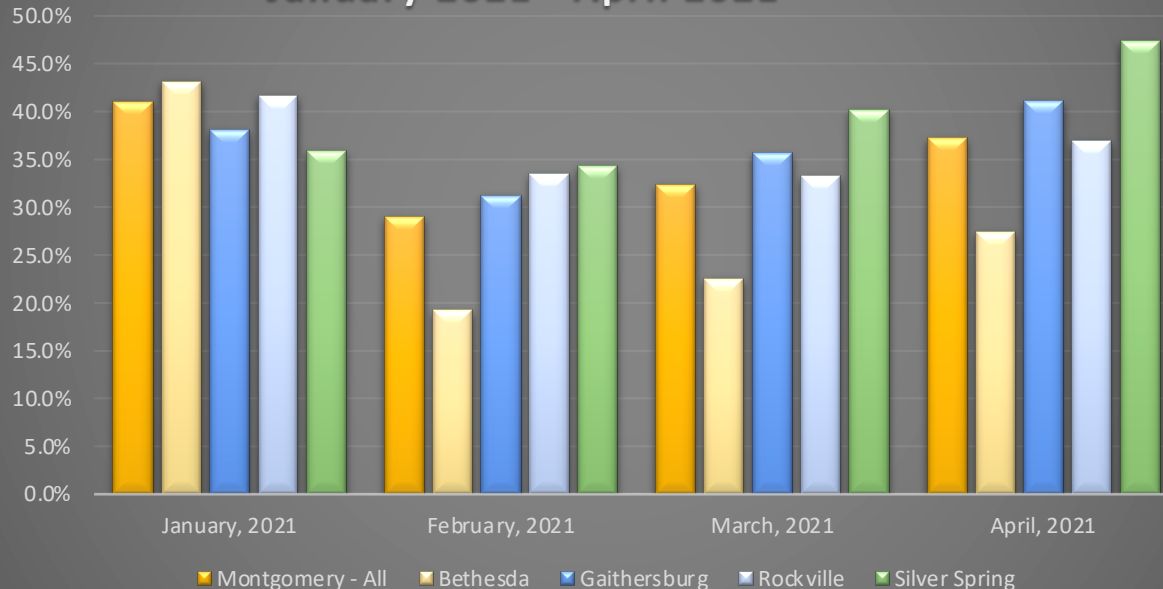
- November 2020: \$87.44
- December 2020: \$81.75
- January 2021: \$97.19
- February 2021: \$82.55
- March 2021: \$84.77
- April 2021: \$89.57

Source: Smith Travel Research

COMMUNITY HOTEL OCCUPANCY



Hotel Occupancy by Community January 2021 - April 2021



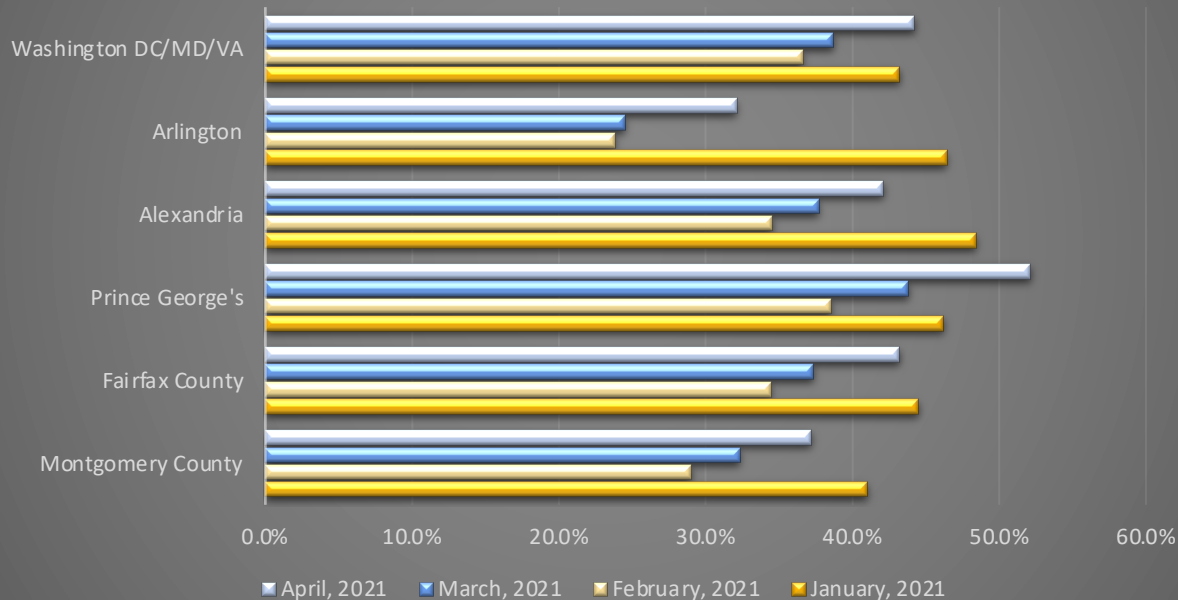
April 2021 Hotel Occupancy

- Montgomery (All): 37.2%
- Bethesda: 27.4%
- Gaithersburg: 41.1%
- Rockville: 36.9%
- Silver Spring: 47.3%

CAPITAL REGION HOTEL OCCUPANCY



National Capital Region Hotel Occupancy



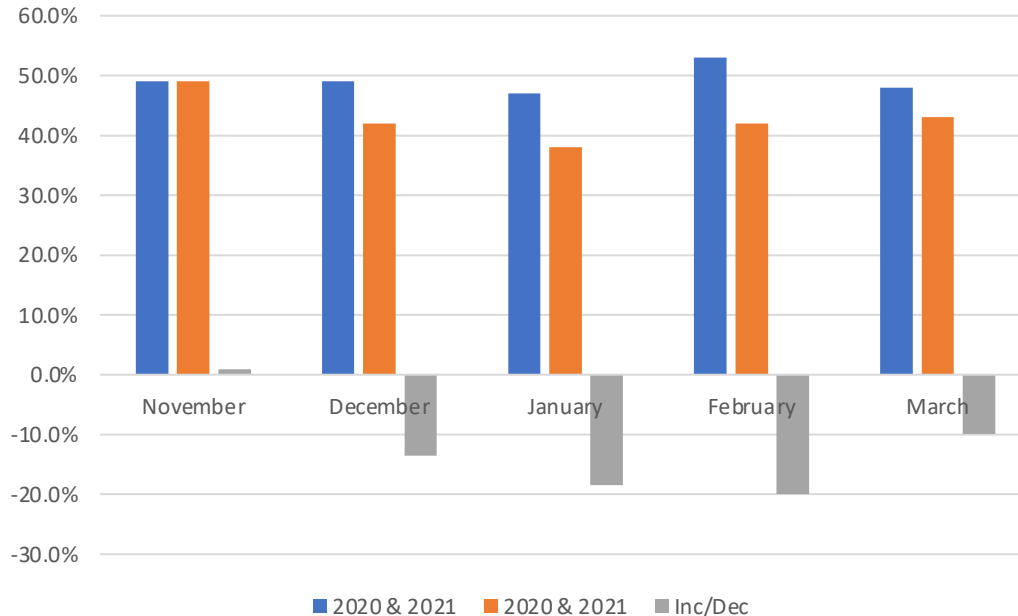
April 2021 National Capital Hotel Occupancy

- Montgomery (All): 37.2%
- Washington, DC: 44.2%
- Arlington: 32.1%
- Alexandria: 42.1%
- Prince George's: 52.1%
- Fairfax: 43.2%

SHORT TERM RENTALS



Airbnb Rentals - Occupancy
All Property Types



March 2021 Airbnb Occupancy by Community

- Montgomery (All): 47%
- Silver Spring: 46%
- Bethesda: 41%
- Rockville: 47%
- Gaithersburg: 67%

Source: Airdna

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.

GBAC STAR Update



32 Participants Opted in for Full Accreditation

- Hotel, Bed and Breakfast and Conference Centers: 21
- Performance & Arts: 9
- Sporting Complex: 1
- Recreational Facility: 1

3 Now Fully Accredited:

- Hyatt Regency Bethesda
- The Bethesdan
- Comfort Inn Shady Grove-Gaithersburg-Rockville



A scenic sunset over a forested hillside. In the foreground, three people are sitting at a table under a patio umbrella, enjoying the view. The sun is low on the horizon, creating a warm, golden glow. The background is a dense forest of trees.

MARKETING UPDATE

Weekend Getaway Destination Strategy

THOUGHT PROCESS



Why Focus on Weekends?

- Traveler sentiment studies show that focus is on leisure travel.
- There is an increased willingness to take short trips close to home.
- The term “weekend” immediately evokes the feelings of relaxation and casualness.

Montgomery County Specific Attributes

- Average length of stay for MoCo travelers is 2 nights/3 days.
- A majority of MoCo attractions are open Thursday – Sunday.
- Traffic is extremely light on weekends, shortening travel times between attractions.

Summer 2021 is considered the year of “The Great American Getaway” with an emphasis on road trips.



“Well over half of those who took a road trip in the pandemic era say their experience has made travel by car more appealing—a sentiment that is even stronger among Millennial and younger travelers. The road trip is likely to sustain its popularity as travel recovers.” – Destination Analysts

MESSAGING PILLARS



BRANDING

Keep Montgomery County “top-of-mind” during the planning process.

READY

Montgomery County is open and ready to welcome visitors again.

AWARENESS

Educate target markets of destination attractions and assets.

INSPIRATION

Nudge potential travelers toward booking a trip through highly-engaging content.

CONVERSION

Make the booking process super easy across all transactional channels.



Countryside Artisans

TARGET MARKETS

Capital Region

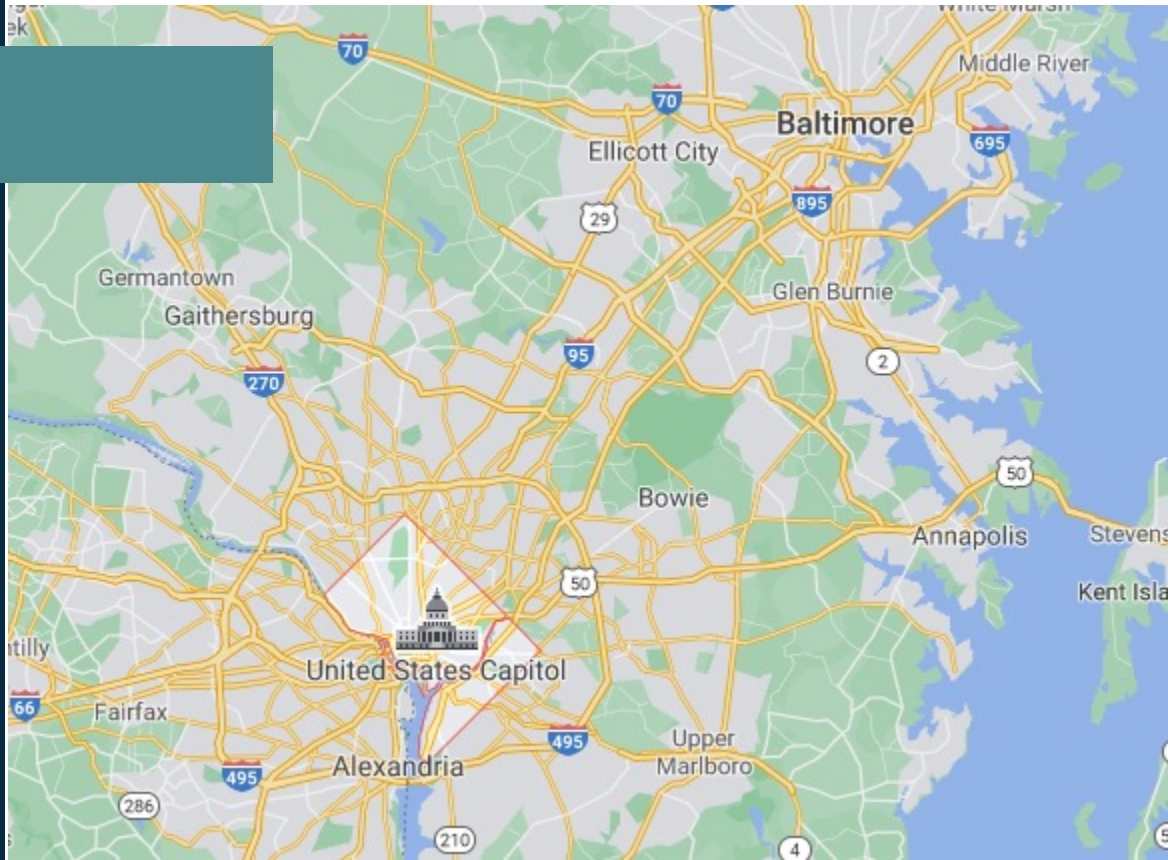
- Montgomery County: 1,051,000
- Washington, DC: 692,683
- Baltimore City & County: 1,436,402
- Northern Virginia: 2,500,000

TOTAL OPPORTUNITY

5,680,085

Road Trip Markets

- Focus on 3-4 hour driving radius
- Philadelphia and New York markets demonstrating highest signs of rebound.





BY THE NUMBERS: CAPITAL REGION STRATEGY

\$432 Per Weekend

Average cost of a weekend getaway for two - \$144 per day

\$122,689,836

Economic impact if 5% of the target market (284,004) took one weekend to MoCo this summer.

CURRENT CAMPAIGNS



Total Duration: Spring – Summer 2021

Spring Campaign

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



Tastemakers

Promote local craft beverage producers through a single tourism trail.



Your Weekend, Your Way

A campaign designed to position Montgomery County as a weekend getaway experience. This campaign will continue to run through the remainder of 2021.

TARGETED CAMPAIGNS

- Arts + Entertainment Venues
- Culinary + Craft Beverage
- Large + Small Shopping Experiences
- Outdoor + Agricultural Adventures
- Museums + Historic Sites

C&O Canal Experience

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

ADVERTISING OUTLETS





ADVERTISING INVESTMENT

\$470,000+

Funds budgeted from three grants provided by Governor Larry Hogan

28,836,626+

Print, digital, editorial and broadcast advertising impressions

37+

Print, digital, editorial and broadcast advertising channels

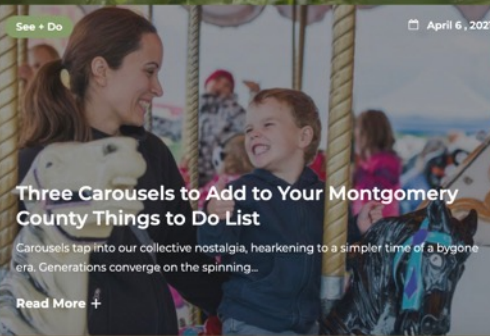
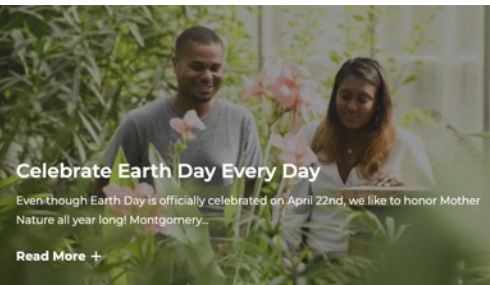
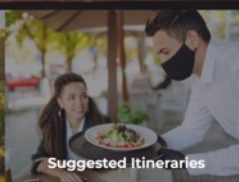
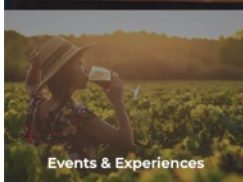
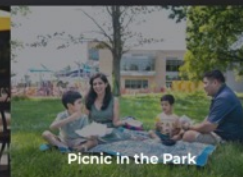
Your Weekend, Your Way



**MOCO
EATS**

A Food Lover's Guide

to Montgomery County, Maryland





1M Page Views

+10% OPY

2.93 Pages Per Session

+22% OPY

1:09 Session Duration

+13% OPY

Top Web Pages & Blog Articles – Spring

March 1 - May 23



Campaign Pages

- MoCo Eats **96,813**
- Montgomery County Road Trips **16,169**
- Tastemakers Trail **4,918**
- Your Weekend, Your Way **4,751**
- Three National Parks **3,159**



Blog Articles

- Everything You Need to Know About Visiting Kenwood Cherry Blossoms **18,414**
- Everything You Need to Know About Visiting the C&O Canal **3,050**
- Three Carousels to Add to Your Montgomery County Things to Do **2,688**

PUBLIC RELATIONS: JULY 2020 – MAY 2021



- Washingtonian
- Fox 5 DC
- Lonely Planet
- Thrillist
- MSN Travel
- National Geographic Traveller UK
- AAA World Magazine
- Smart Meetings
- Wall Street Journal
- USA Today
- Matador Network
- Convention South Magazine
- Money.com

**AD EQUALIVANCY
VALUE OF PRESS
COVERAGE**
\$1,813,251



**TOURISM
DEVELOPMENT**



MoCo Eats Week Highlights



**MOCO
EATS
WEEK**

APRIL 23–MAY 3



Not Your *Typical*
Restaurant Week

Web Traffic

84,155 Page Views

Savings Pass

3,367 Sign-Ups

Paid Advertising

2,276,911 Impressions

Organic Social

85,228 Reach

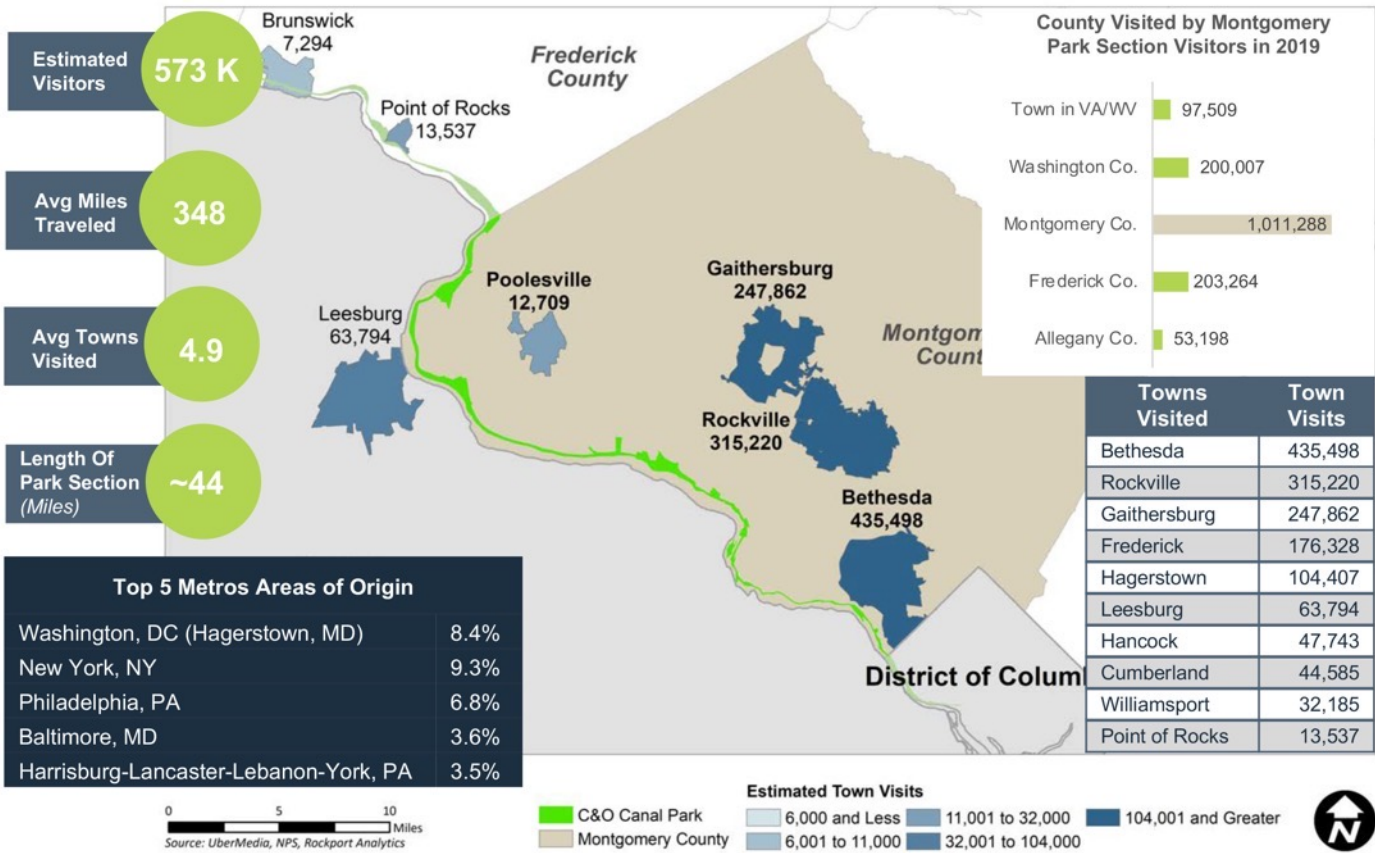


Tyler from Elliot
in the Morning

Check in.
Drink Up.
Get Rewarded.

- Landing Page Refresh
- New Advertising Channels: Transpromotion + iHeart
- Craft Pass Gamification

The Montgomery County Section of the C&O Canal NHP Received 43.7% of Visits



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

A summer reset at the C&O Canal National Park

By **WP Creative Group**

May 25 at 12:31 AM

Celebrating 50 years as part of the National Historical Park Service, the park and nearby towns offer travelers a wealth of nature, culture and history for a fresh start to post-pandemic life.

After a year of uncertainty, many people are eager to move forward. About 90 percent of vaccinated travelers now feel ready for a getaway, while about 87 percent of U.S. residents overall expect to travel this summer. For those from the D.C. area in particular, the Chesapeake & Ohio Canal National Historical Park is an ideal destination for this moment. Reachable by car and offering 20,000 acres of peaceful nature, hundreds of historical structures, and lively nearby towns to explore, the park is

<https://www.washingtonpost.com/brand-studio/wp/2021/05/25/a-summer-reset-at-the-co-canal-national-park/>

Content From



C&O Canal AAA World Co-Op



C&O Canal

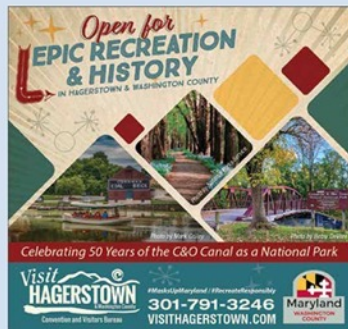
4 Places to Explore Along the C&O Canal

ALLEGANY COUNTY
Continue your ride! The Great Allegheny Passage is a 150-mile rail-trail that connects at the terminus in Cumberland, MD to Pittsburgh, PA. It was the first trail to earn a spot in the National Rail-Trail Hall of Fame.

WASHINGTON COUNTY
The Hagerstown Cultural Trail connects two of our city's most popular destinations - the historic downtown Arts & Entertainment District and Maryland Theatre with City Park and the Museum of Fine Arts. With public art experiences, gathering spaces, and other amenities along the way, the Trail is a destination for visitors.

FREDERICK COUNTY
Frederick County is a must do stop along your journey. The canal towns of Point of Rocks and Brunswick will delight the whole family with farm fresh ice cream, locally brewed beer, and prime locations for train spotting.

MONTGOMERY COUNTY
Explore the great outdoors, soak up history and culture at countless museums and galleries, and indulge in the country's best shopping and finest restaurants. Plan a road trip filled with wineries and farm breweries, spend the day at Pike & Rose, and challenge your friends to a round of TopGolf in Germantown.



Must-See Places to Visit:

- PAW PAW TUNNEL**
Oldtown, MD
- CUSHWA BASIN**
Williamsport, MD
- BRUNSWICK HERITAGE MUSEUM**
Brunswick, MD
- MONOCACY AQUEDUCT**
Dickerson, MD
- GREAT FALLS TAVERN VISITORS CENTER**
Potomac, MD



MONTGOMERY COUNTY, MD
Take a historic adventure and explore Montgomery County, Maryland's Wide-Open Spaces. There is no shortage of ways to safely discover new places in Montgomery County, Maryland. Explore scenic byways, vineyards, breweries, historic sites, and the county's 93,000-acre Agricultural Reserve. Visit the wonders of Maryland's Great Falls on the Potomac River, hike Sugarloaf Mountain, explore the C&O Canal National Historical Park, or spend the day at Brookside Gardens. Indulge in local dining and shopping along our main streets and downtowns. If you're looking to plan a weekend getaway for the spring, these miscellaneous getaway itineraries are sure to inspire you to visit when the time is right for you, Maryland. Open. VisitMontgomery.com



Be sure to visit AAA.com/InCenter to request more information and to enter the drawing for a \$250 gift card.

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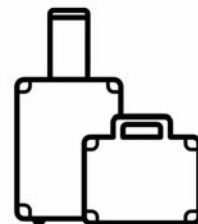


TRAVELER SENTIMENT

From Expedia Group Media Solutions



1 in 2

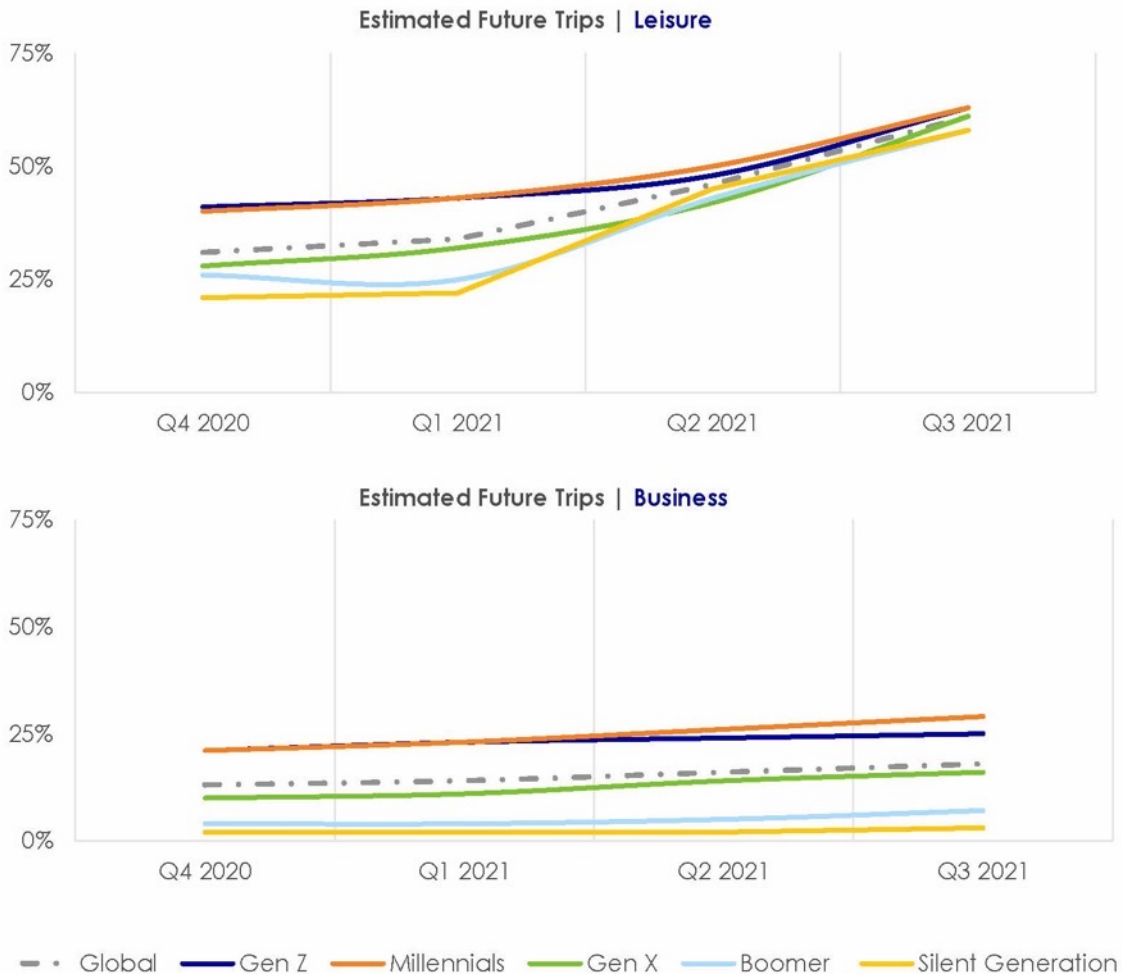


travelers feel optimistic about taking a trip in the next 12 months. **The other half need reassurance.**

Younger generations are leading future leisure and business travel

Millennials and Gen Z estimate traveling more than other generations, exceeding the global total. While their leisure travel is on par with each other, Millennials will likely drive future business travel more.

Expedia Group Media Solutions – Traveler Sentiment & Influences 2020/2021
C1. How many trips are you likely to go on in the next 12 months?





7 in 10

travelers are willing to **drive up**
to 6 hours for a leisure trip during
COVID-19



8 in 10

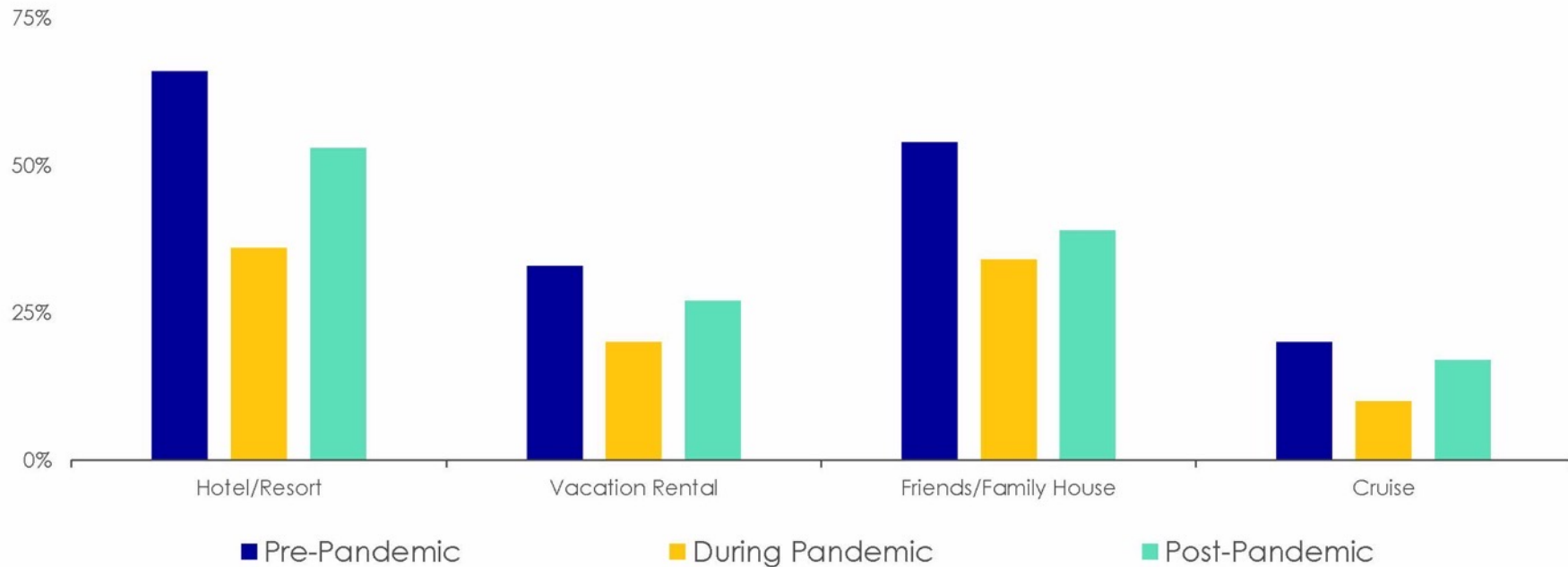
travelers expect to make accommodation decisions based on implemented pandemic measures, including:

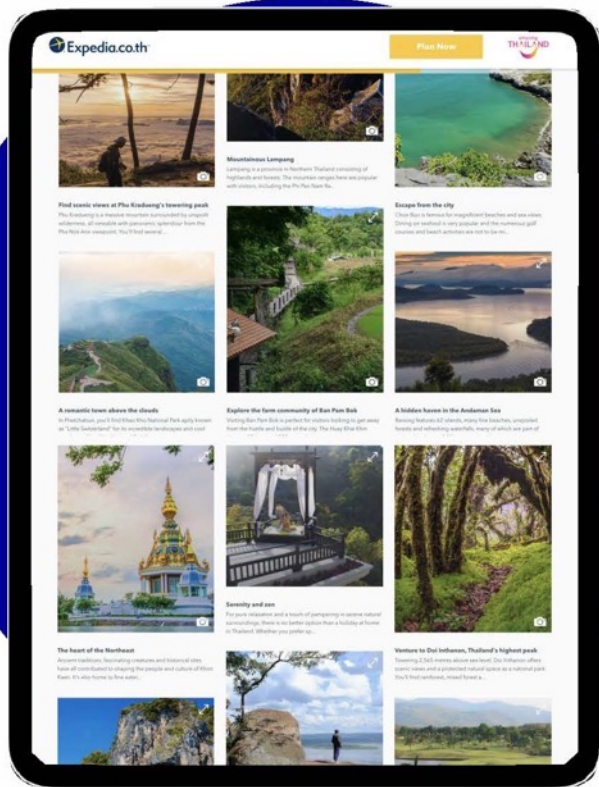
- COVID-19 hygiene protocols
- Strict use & enforcement of masks
- Reduced capacity
- Contactless check in, room service, and takeout





Travelers are looking to return to trusted accommodations post-pandemic





Travelers are increasingly turning to online travel sources for trip planning - more than pre-pandemic



24% more
Online Travel Agencies (OTAs)



20% more
Destination Sites



16% more
Travel Advertising



GROUPS & MEETINGS UPDATE

A Look Ahead



16 Leads

8,651 Room Nights | \$1,816,572 Economic Impact

5 Bookings

3,624 Room Nights | \$838,236 Economic Impact

6 Lost Bookings

Due to Location, Size, Politics | \$1,752,930 Economic Impact

Sales Activities



- In April: Leila attended MPI ReConEx and completed follow up and prospecting of 30 planners
- In April: Lee attended ABA (American Bus Association) Virtual MarketPlace on Demand and had appointments with 11 adult and student tour operators. Also completed follow up with 30 tour operators that had appointments with Rich Gilbert from the Maryland Office of Tourism Development and Eric Masterton from Visit Baltimore
- May 17 - 20 - Lee & Leila participated in the Marriott Hybrid Learning Lab in person at Bethesda North Marriott Hotel & Conference Center welcoming and connecting with 400+ Meeting Professionals
- May 19: Lee participated in SYTA Maryland Destination update with student tour operators.
- Upcoming events Lee attending in May: ABA - Virtual MarketPlace on Demand - 17 appointments with Tour Operators and June: ABA - Virtual MarketPlace on Demand for Tour Operators.

New Group Tour Itineraries



**MONTGOMERY COUNTY, MARYLAND'S
TASTEMAKERS TRAIL GROUP TOUR SAMPLE ITINERARY**

The Tastemakers Trail is a guide featuring breweries, wineries, a distillery, coffee roaster and more throughout Montgomery County, Maryland. With over 20 distinctive craft beverage places to visit, your tour guests are sure to have a memorable experience next door to Washington, DC. Learn more at www.tastemakerstrail.com.

THREE DAY SUGGESTED ITINERARY

Day 1

- Begin with a hearty breakfast at **Silver Diner** at Rio Lakefront.
- Explore at your leisure around **Rio Lakefront**.
- Continue your journey to **The Family Room** for unique, local gifts.
- Visit **Art of Fire** for a glass blowing demonstration by local artisans.
- Head to **Elder Pine Brewing** for a brewery tour and tasting.
- Enjoy a second brewery tour at **Brookville Beer Farm**.
- Conclude with a farm-to-table dinner at **The Manor at Silo Falls**.

Day 2

- Begin with a coffee tour at **Mayorga Organics**.
- Enjoy an art tour inside **The Mansion at Strathmore**.
- Visit **Kensington Antique Row** for shopping.
- Walk to **Frankly Pizza** for lunch.
- Spend the afternoon at **Brookside Gardens**.
- Enjoy a casual walk to **Silver Branch Brewing, Astro Lab Brewing and Denizens Brewing Company**.
- Dine at your leisure in **Downtown Silver Spring**.

Day 3

- Spend the morning touring **Black Hill Regional Park** and **Little Seneca Lake** aboard a pontoon boat.
- Head over to **Clarksburg Premium Outlets** for the latest bargains.
- Venture to **Butler's Orchard** for locally made goods at the farm market.
- Conclude with an evening of fun at **Topgolf** in Germantown.



Where to Stay

Montgomery County, Maryland offers a wide selection of accommodations to fit the needs and preferences of any size group. Options include downtown locations with Metro access to the nation's capital, easy connections to the area's major highways, and within a short drive to local historic and rural attractions.

**MONTGOMERY COUNTY, MARYLAND'S
C&O CANAL EXPERIENCE GROUP TOUR ITINERARY**

Celebrating 50 Years as a National Park!

Who's ready for an adventure? As the C&O Canal National Historical Park celebrates its 50th year as a National Park in 2021. This 3-night and 3-day group itinerary was inspired by this incredible natural attraction and Montgomery County's many offerings in the area.

THREE DAY SUGGESTED ITINERARY

Day 1

- Tour the **Clara Barton National Historic Site**, home of the first Red Cross Headquarters.
- Spend the afternoon at **Glen Echo Park**. Ride a carousel, tour the historic art deco architecture, and take an art class with a local artist in residence.
- Enjoy a boxed charcuterie lunch and tour of **Lockhouse 10**, part of the C&O Canal Quarters Program.
- Spend the day at **Great Falls Tavern Visitors Center, Billy Goat Trail and the Great Falls Overlook**.
- Take interpretative tour with a **C&O Canal National Park Ranger**.
- Return to your hotel and enjoy dinner on your own.

Day 2

- Spend the morning at **Glenstone Museum** and lunch at the café.
- Head to **Strathmore** for a docent led tour of the Music Center and galleries in the Mansion.
- Enjoy a brewery tour and tasting at **Elder Pine Brewery & Blending**.
- Dinner and explore the grounds at **Silo Falls**.

Day 3

- Venture to **The Family Room** for local shopping.
- Participate in a pick-your-own farm experience at **Butler's Orchard**.
- Complete your trip with bargains at **Clarksburg Premium Outlets**.
- Enjoy lunch on your own.



Where to Stay

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SPORTS UPDATE

A Look Ahead

2021 YOUTH SPORTS TOURNAMENTS



| Event Name | Dates |
|--|---|
| MSI Cherry Blossom Soccer Tournament - CANCELLED | March 19-21, 2021 |
| Bethesda Soccer - Youth - RELOCATED | April 2-3, 2021 |
| Potomac Memorial Soccer Tournament - RELOCATED | May 28-31 |
| National Youth Cricket League (Montgomery, Howard and Prince Georges Counties) | July 2-5, July 6-9 and Women July 10-12 |
| Mid-Atlantic Cup Soccer | June 11-13, 2021 |
| NEW IWLCA (Intercollegiate Women's Lacrosse) | June 18-20, 2021 |
| Laxin Out Loud Lacrosse Tournament | June 26-27, 2021 |
| NEW World Series of Youth Lacrosse | June 30-July 5, 2021 |
| NEW Main Stage Lacrosse | July 7-8, 2021 |
| FLG Lacrosse | July 9-11, 2021 |
| NEW Pinnacle Lacrosse | July 16-18, 2021 |
| NEW Athletes Unlimited Lacrosse League | July 16-August 2021 |
| NEW AU Futures (Tentative) | 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 |



Professional Golf Events



Wells Fargo Championship

TPC Potomac at Avenel
Farm

May 2-8, 2022

<https://wellsfargochampionship.com/>

KPMG Women's PGA Championship

Congressional Country Club

June 21-26, 2022

<https://www.kpmgwomenspgachampionship.com/>

FIFA World Cup 2026

Baltimore and Washington, DC being
considered as US host destination

THANK YOU!



Kelly Groff
President & CEO



Cory Van Horn
Director of Marketing



Leticia Engel
Marketing Manager



Leila Beltramo
Destination
Sales Manager



Lee Callicutt
Destination
Sales Manager