

Visit Montgomery's Community Report on Tourism

Fiscal Year 2023

July 2022 – June 2023



Letter From President & CEO

Dear Industry Friends,

In Fiscal Year 2023 travel returned to Montgomery County, MD. Hotel tax collections by Montgomery County, MD, City of Rockville and City of Gaithersburg were nearing the Fiscal Year 2019 collection levels.

Hotel occupancy and average daily rate in 2022 had not recovered to FY 2019 levels. However, for the period of January 2023 to June 2023 countywide the hotel industry experienced further rebounding. Hotel occupancy for this period compared to 2022 increased 15.4%, average daily rate increased by 16.6% and revenue per available room increased by 33.2%. These are all promising indications that we continue to move into pre-pandemic activity and revenue levels.

After many months of strategic planning and research, the organization was able to re-brand. We've launched a new look, feel, logo and tagline, Visit Montgomery, MD, Maryland's Cultural Capital. The team looks forward to continuing to roll out the brand in Fiscal Year 2023.

We hope you review our Fiscal Year 2023 Annual Report. The Board of Directors and Visit Montgomery Team are proud of our accomplishments and look forward to continuing our work in the community.

Best,



Kelly Groff
President & CEO



Fiscal Year 2023 Team



Kelly Groff
President & CEO



Cory Van Horn
Chief Strategy Officer



Leticia Engel
Senior Marketing Manager



Yodit Kirubel
Community Engagement &
Partnership Manager



Aynae Simmons
Communications Coordinator



Lee Callicutt
Senior Destination Sales Manager



Trek Bookter
Destinations Sales Manager

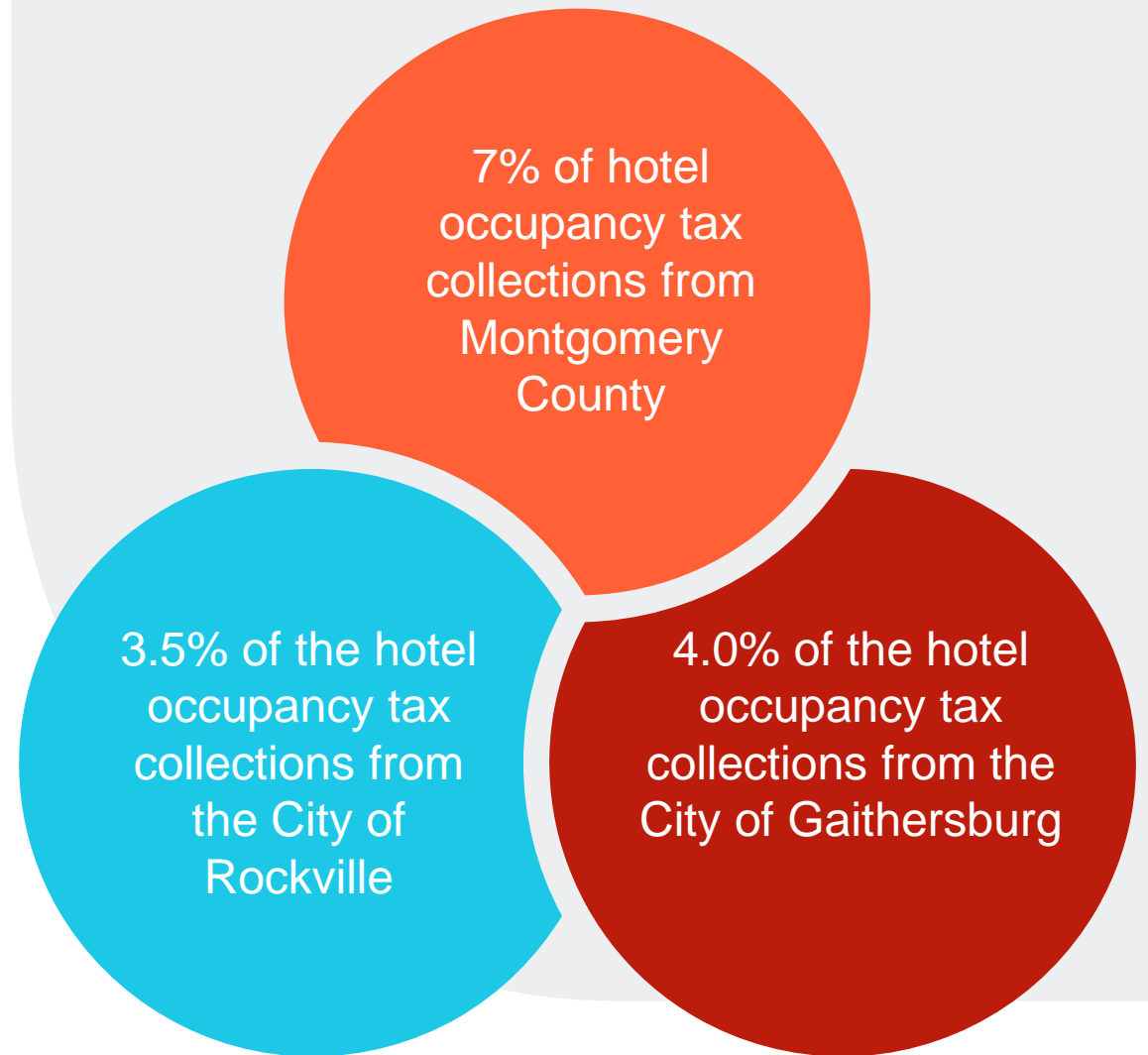
Mission & Funding Mechanisms

The mission of Visit Montgomery is to market and develop the county and its communities as a preferred destination for group and individual travel thereby fostering **economic growth** and **quality of place** through tourism.

Visit Montgomery is a 501 (c) 6 non-profit organization with the oversight by a volunteer board of directors.

Visit Montgomery's annual operating budget is composed of several other revenue sources including partnership dues, marketing grant from the Maryland Office of Tourism, cooperative advertising and trade show partnerships, events and housing service rebates.

Funding Sources



Montgomery County at a glance

According to *WalletHub*, Montgomery County is one of most diverse communities in the country with Germantown, Gaithersburg, Silver Spring and Rockville all ranking in that site's "Top 10 Most Diverse Communities in the U.S." Both Rockville and Gaithersburg have achieved perfect scores in Municipality Equality Index (MEI), according to the Human Rights Campaign (HRC). In 2022, Rockville was ranked 20th in *Money Magazine's* "50 Best Places to Live in the U.S. in 2022", citing diversity as a key contributor to the ranking. Montgomery County ranks high where Black residents are prospering in the "Black Progress Index," a study that examines the social factors that influence Black well-being by the Brookings Institution.

- **1 Million Population**
- **507 Square Miles**
- **93,000-Acre Agricultural Reserve**
- **54 Hotels**
- **8,920 Hotel Rooms**
- **3 International Airports Nearby**
- **13 Metro Stations**
- **3 National Parks**
- **400+ Regional Parks**

Economic Impact of Tourism 2022

Source: *Tourism Economics*

Visitor Spending Grew by 30% in 2022

\$1,896.9 Billion

2022 Visitor Spending

8,245,500

2022 Day & Overnight Visitors

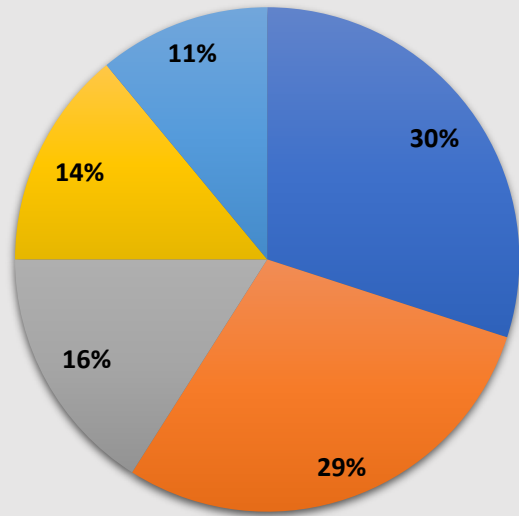
\$528.9 million

Federal, State, Local and Hotel Tax Revenues

Visitor Spending and Visitor Volume – 2022

Source: Tourism Economics

Visitor Spending by Category 2022

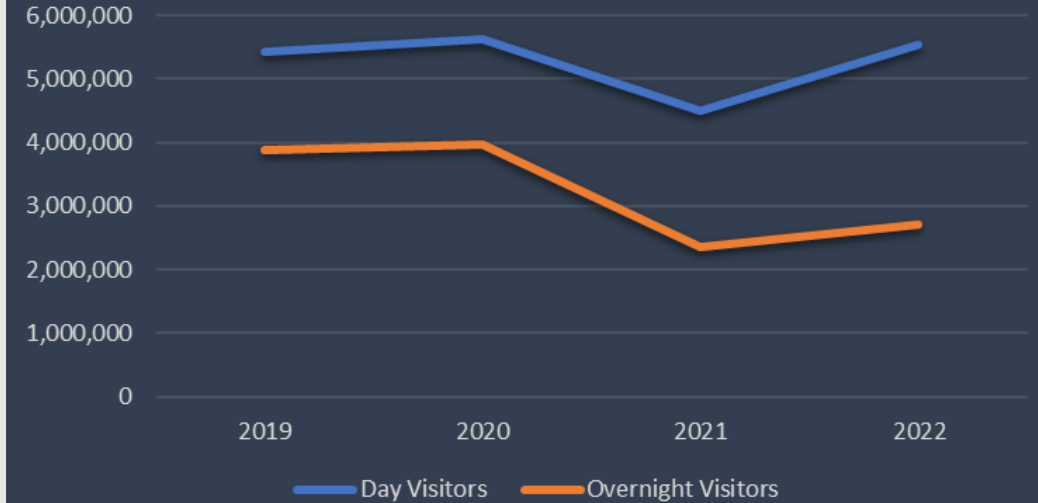


■ Food and Beverage ■ Transportation ■ Lodging ■ Retail ■ Recreation

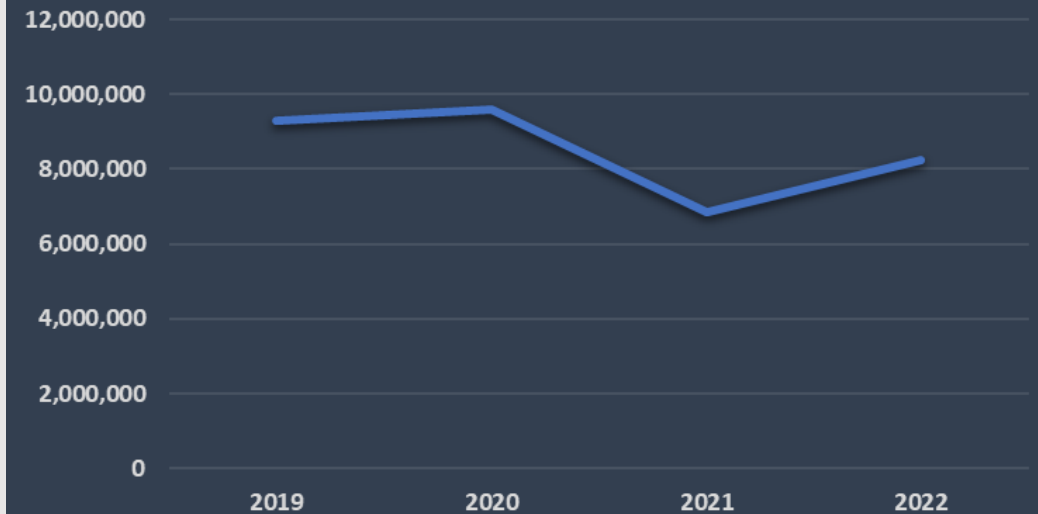
Visitor Impacts Montgomery County			
	2022	2022 Growth	% Relative to 2019
Federal Taxes	\$ 254,500,000	21.2%	81.9%
State & Local Taxes	\$ 256,500,000	25.4%	83.2%
Hotel Taxes	\$ 17,900,000	77.4%	82.2%

Over 20,000 visitor-supported jobs representing 5% of all jobs in Montgomery County.

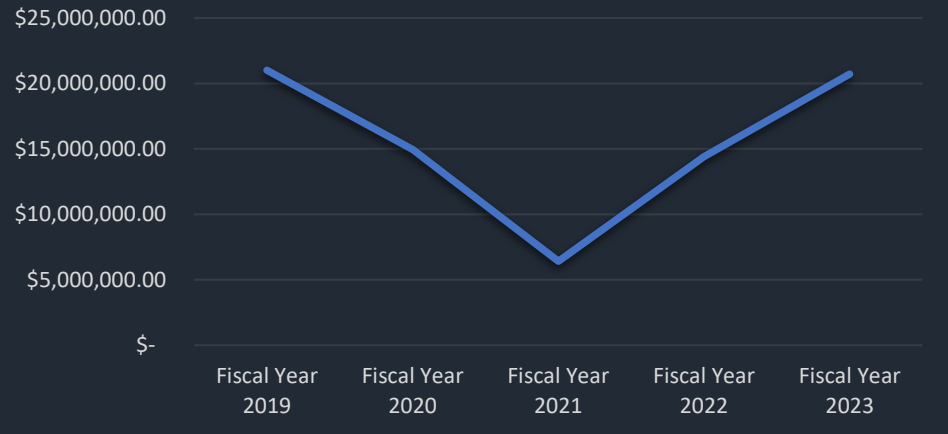
Day versus Overnight Visitor Volume



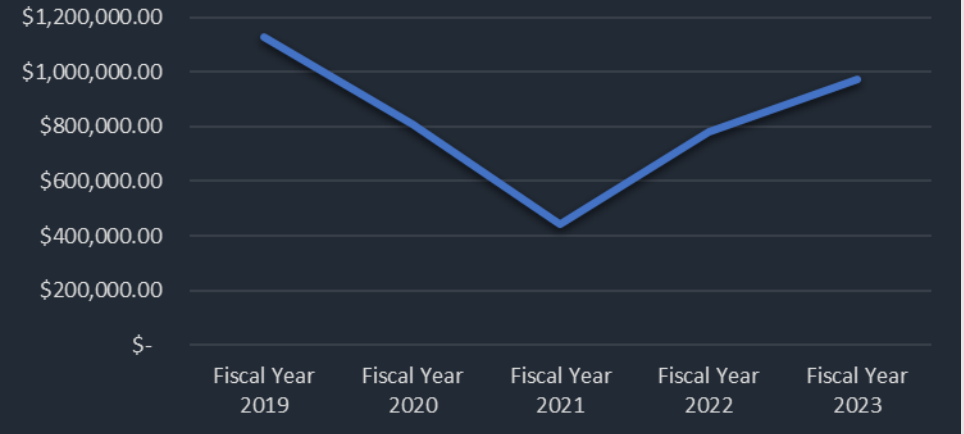
Total Visitation



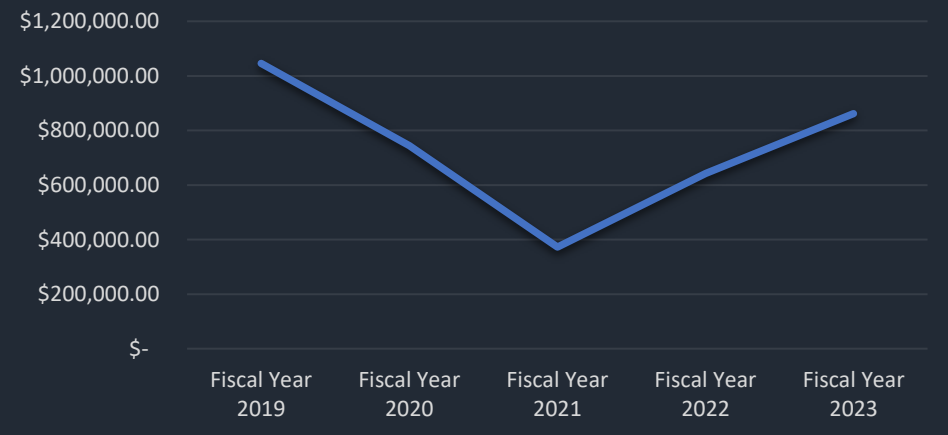
Hotel Tax Collections Montgomery County



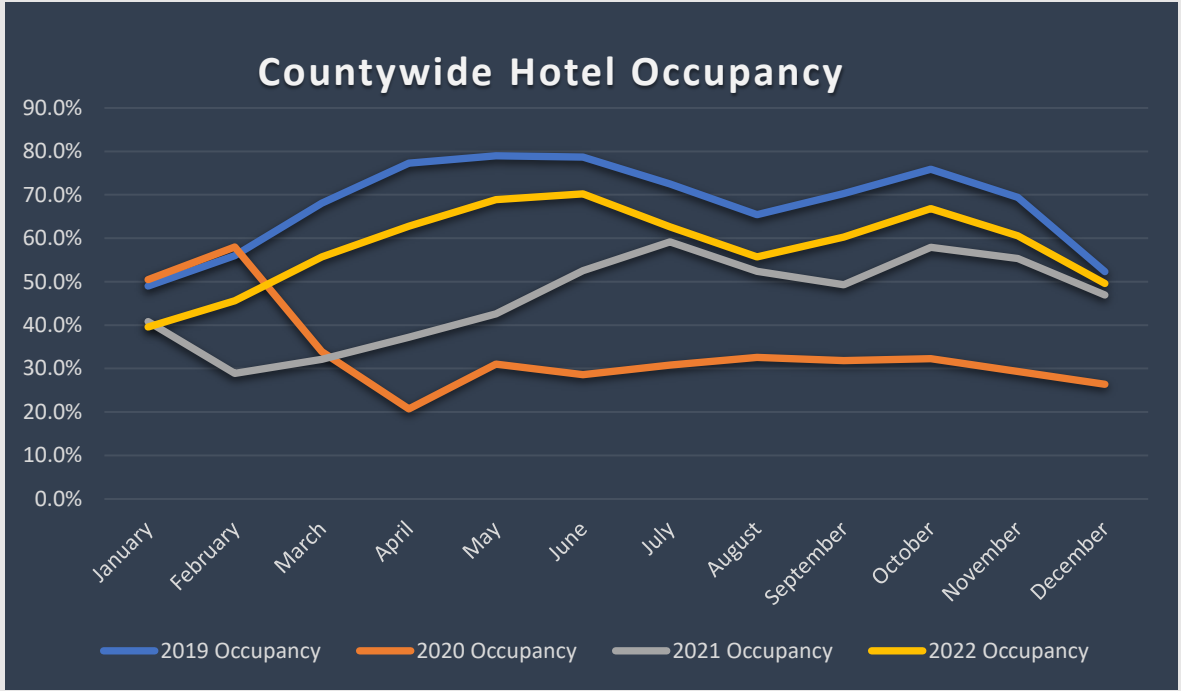
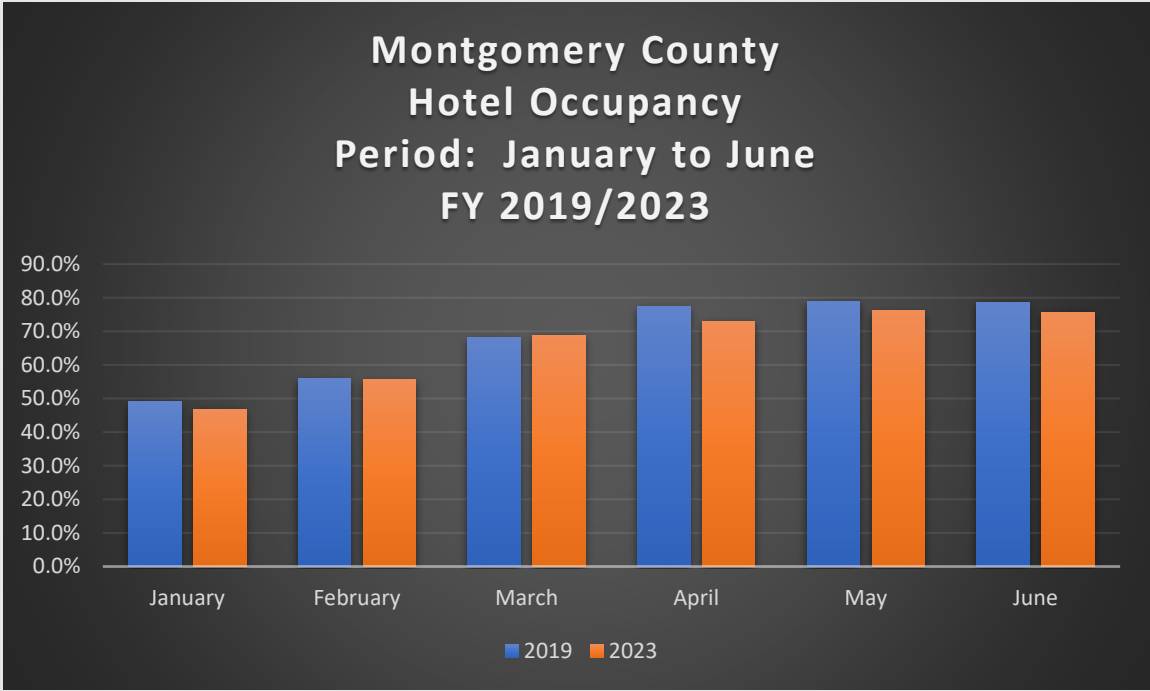
Hotel Tax Collections City of Gaithersburg



Hotel Tax Collections City of Rockville



Hotel Data - Countywide



Source: Smith Travel Research

Airbnb Short Term Rental

MONTGOMERY COUNTY	2019	2020	2021	2022
Listings	1,401	1,468	1,635	2,035
Occupancy	58%	52%	52%	57%
Average Daily Rate	\$ 149	\$ 167	\$ 191	\$ 203
Revenue Per Available Room	\$ 86	\$ 87	\$ 100	\$ 116

BETHESDA	2019	2020	2021	2022
Listings	383	446	399	473
Occupancy	47%	45%	43%	51%
Average Daily Rate	\$ 182	\$ 204	\$ 215	\$ 239
Revenue Per Available Room	\$ 86	\$ 93	\$ 92	\$ 121

GAITHERSBURG	2019	2020	2021	2022
Listings	105	120	138	185
Occupancy	62%	58%	58%	58%
Average Daily Rate	\$ 142	\$ 179	\$ 203	\$ 184
Revenue Per Available Room	\$ 88	\$ 105	\$ 117	\$ 107

ROCKVILLE	2019	2020	2021	2022
Listings	144	137	141	230
Occupancy	65%	56%	56%	55%
Average Daily Rate	\$ 137	\$ 127	\$ 146	\$ 168
Revenue Per Available Room	\$ 89	\$ 67	\$ 81	\$ 93

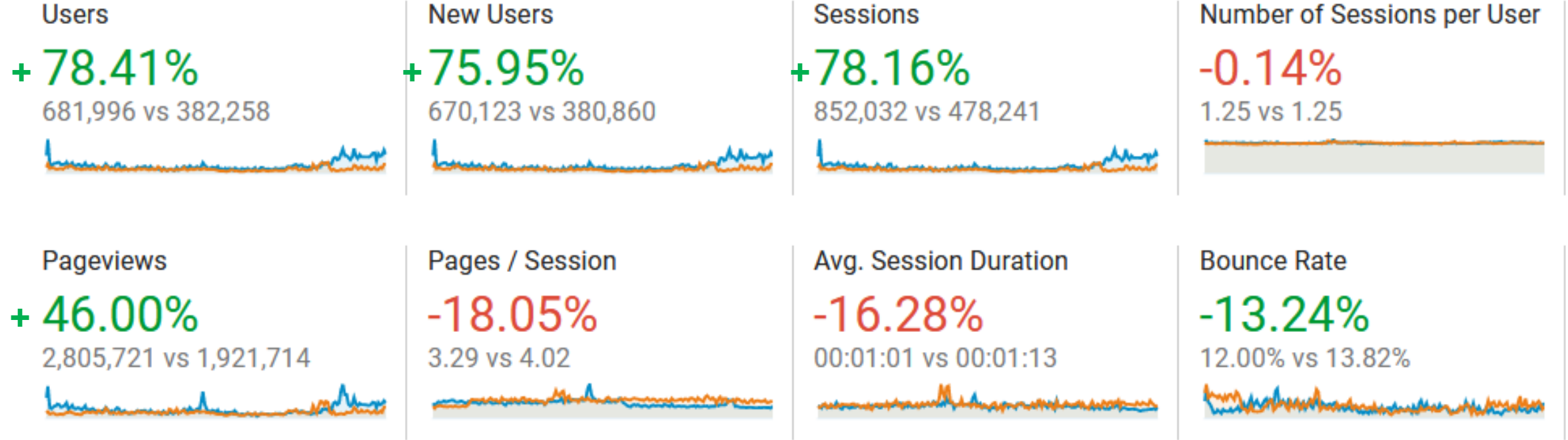
SILVER SPRING	2019	2020	2021	2022
Listings	367	380	521	600
Occupancy	65%	56%	55%	62%
Average Daily Rate	\$ 119	\$ 123	\$ 144	\$ 165
Revenue Per Available Room	\$ 77	\$ 69	\$ 80	\$ 102



Marketing Division

Reflection & Wrap Up

FISCAL YEAR END WEBSITE MILESTONES: JULY 2022 – JUNE 2023



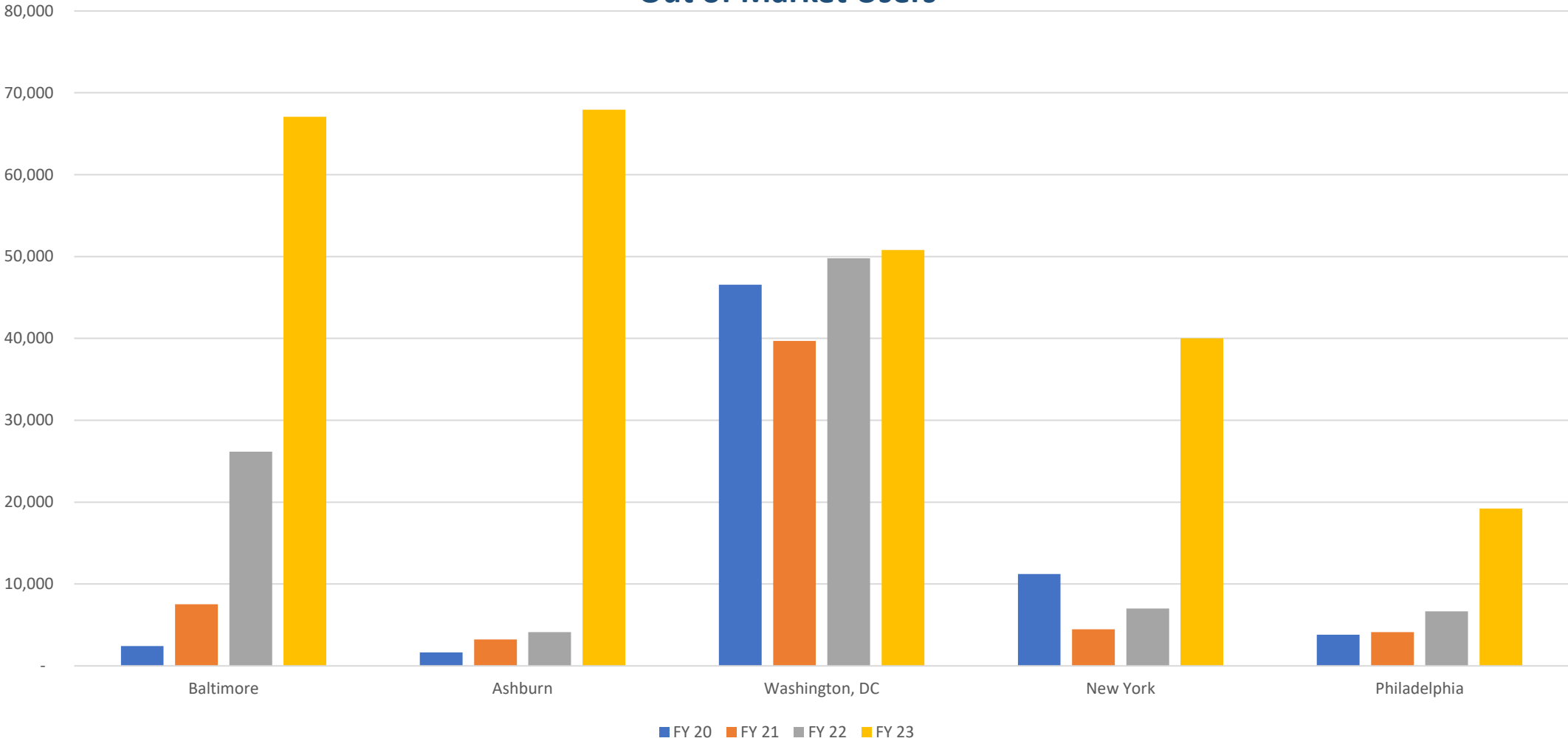
TOP LANDING PAGES

Blogs & Content		Weekend Getaways		Events Calendar		Tastemakers Trail	
465,599 Pageviews	+8.47%	212,223 Pageviews	+121.31%	518,023 Pageviews	+91.44%	561,683 Pageviews	+1,547.21%
162,087 Unique Pageviews	+20.33%	77,583 Unique Pageviews	+126.65%	392,886 Unique Pageviews	+97.04%	210,582 Unique Pageviews	+1,857.08%
0:22 Avg Session	+16.33%	0:16 Avg Session	+7.33%	1:04 Avg Session	-9.12%	0:16 Avg Session	-30.93%
0.54% Bounce Rate	-74.76%	1.32% Bounce Rate	-86.58%	46.93% Bounce Rate	-6.41%	1.52% Bounce Rate	-72.66%

FISCAL YEAR END WEBSITE TRENDS

JULY 2022 – JUNE 2023

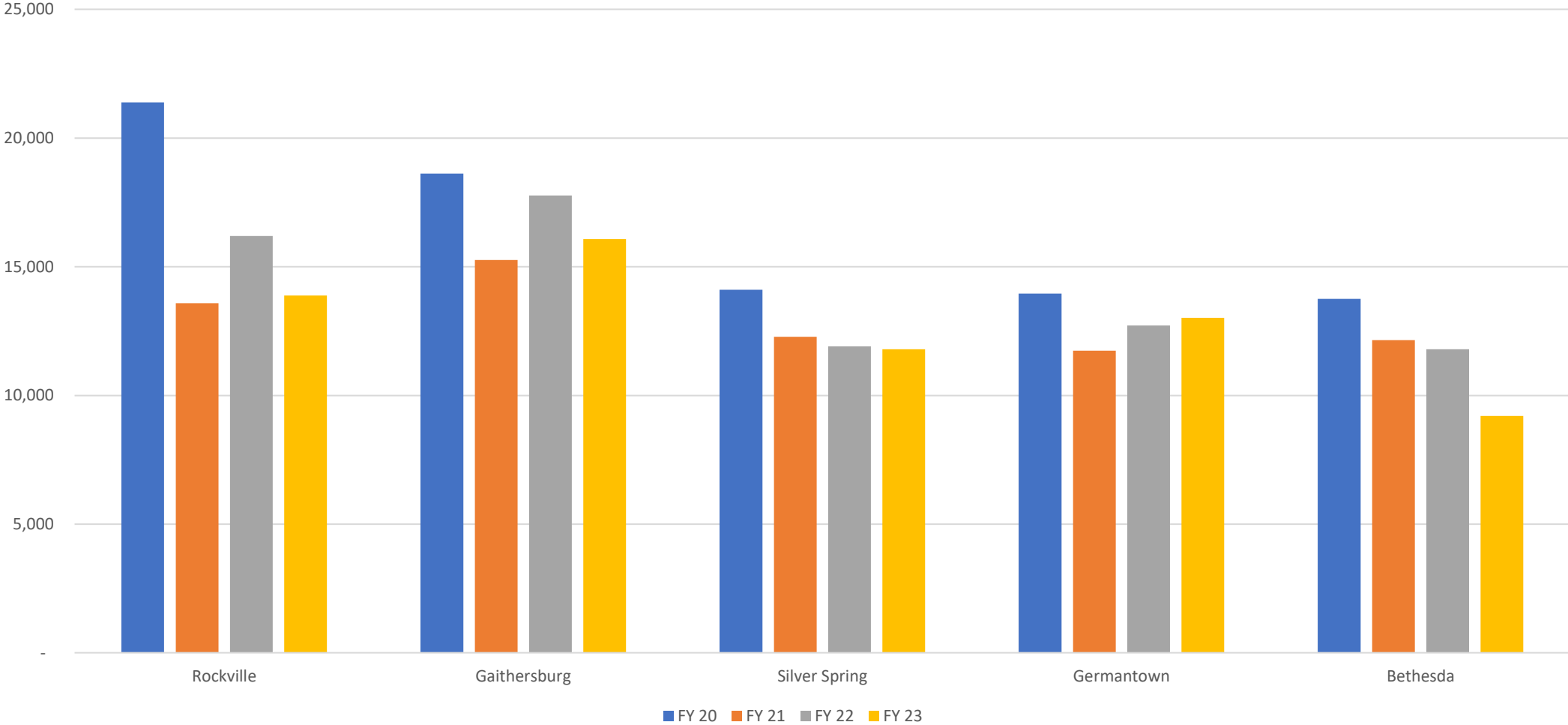
Website Traffic Trends Out of Market Users



FISCAL YEAR END WEBSITE TRENDS

JULY 2022 – JUNE 2023

Website Traffic Trends In Market



Social Media Engagement July 2022 – June 2023

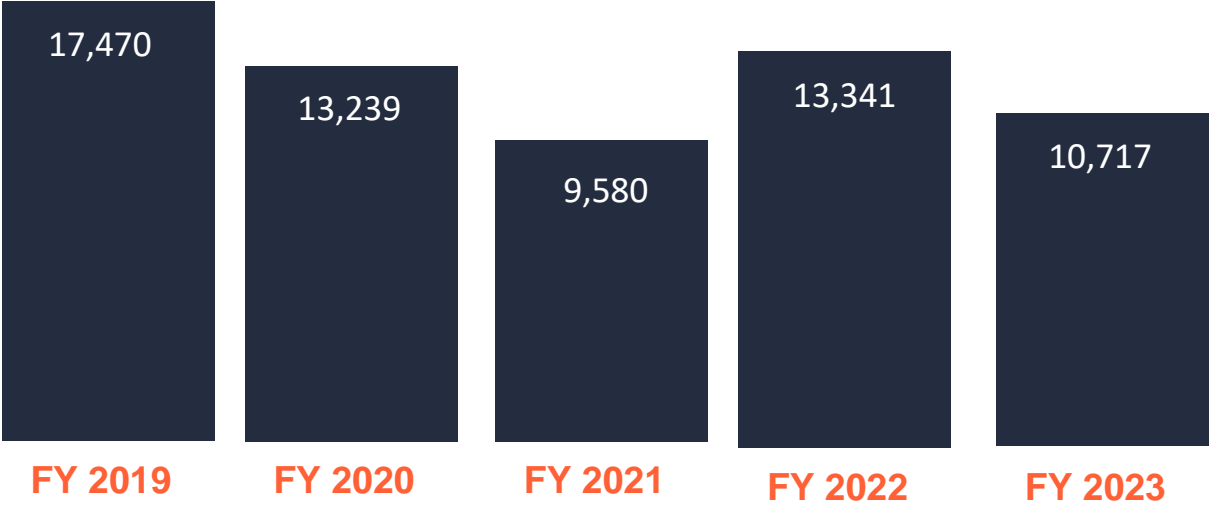
- **4k** New Followers
- **3.8M** Profile Impressions
- **3.1M** Profile Reach
- **1.2M** Users Reached
- **992** Social Media Posts
- **4.7%** Post Engagement Rate



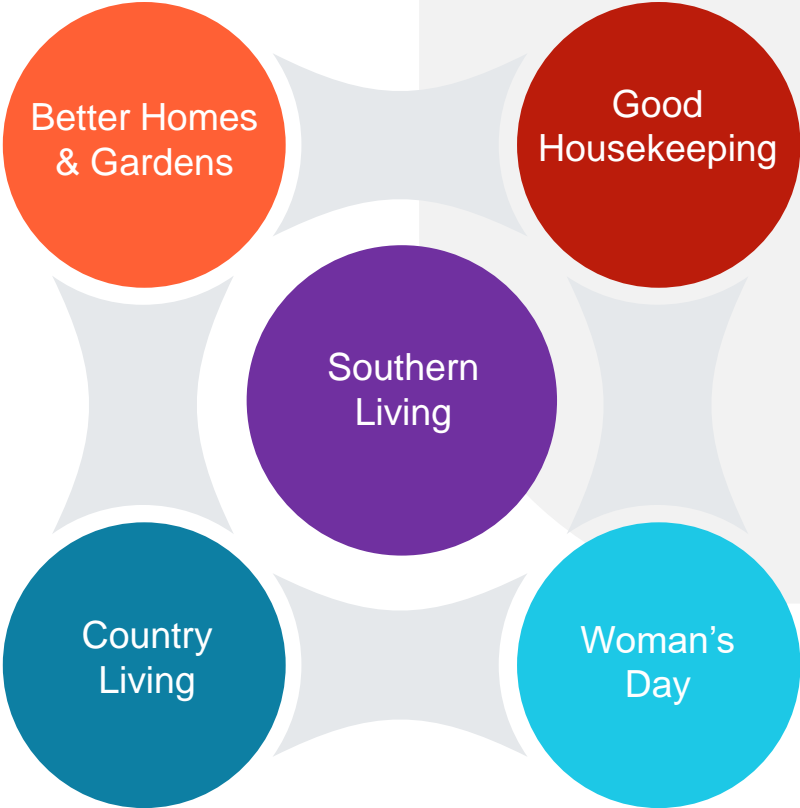
Advertising Inquiries – Print and Digital



Advertising Inquiries by Fiscal Year Travel Guide Requests

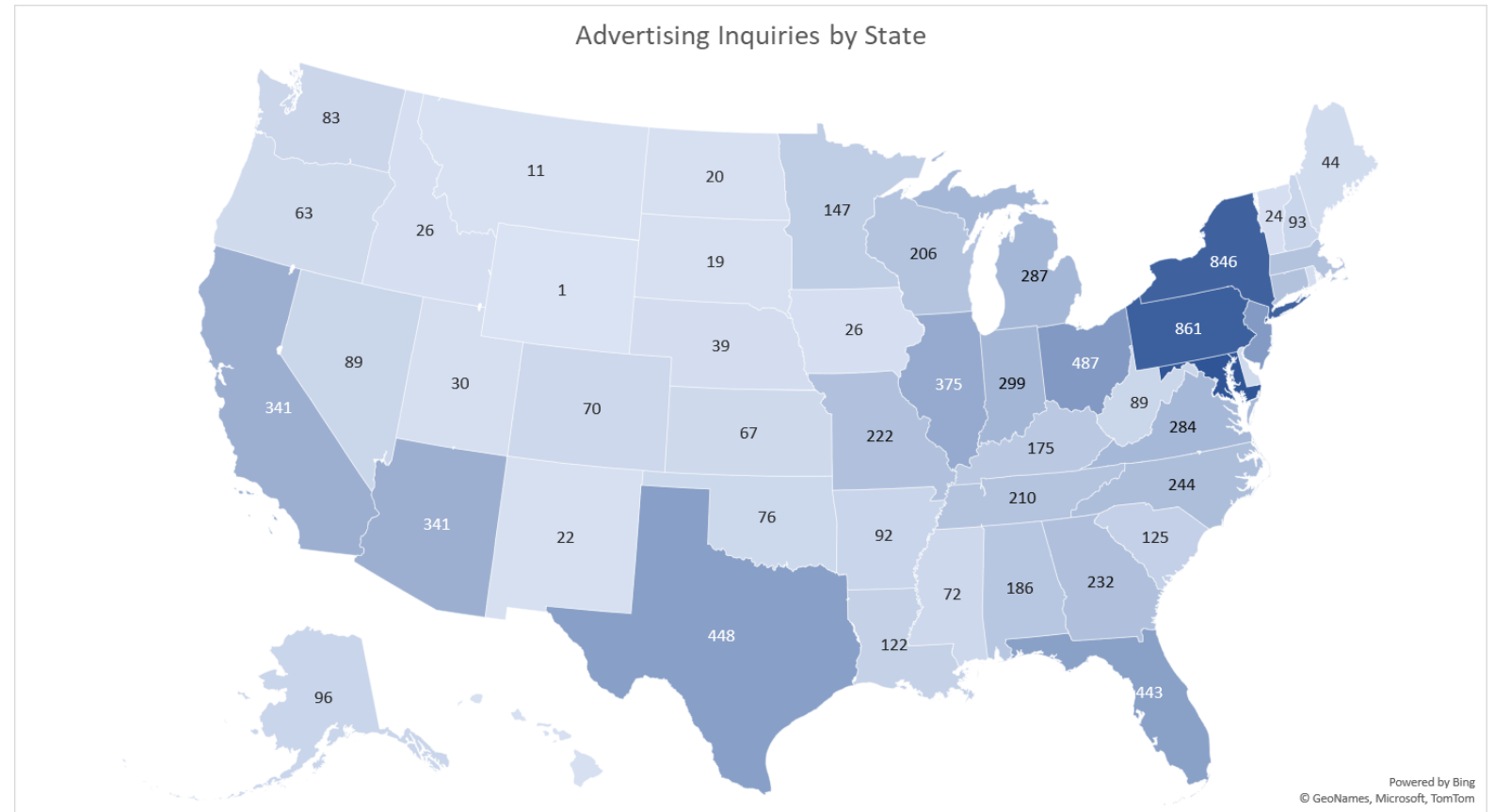


Top Five Producing Print Advertising Channels for Travel Guide Requests

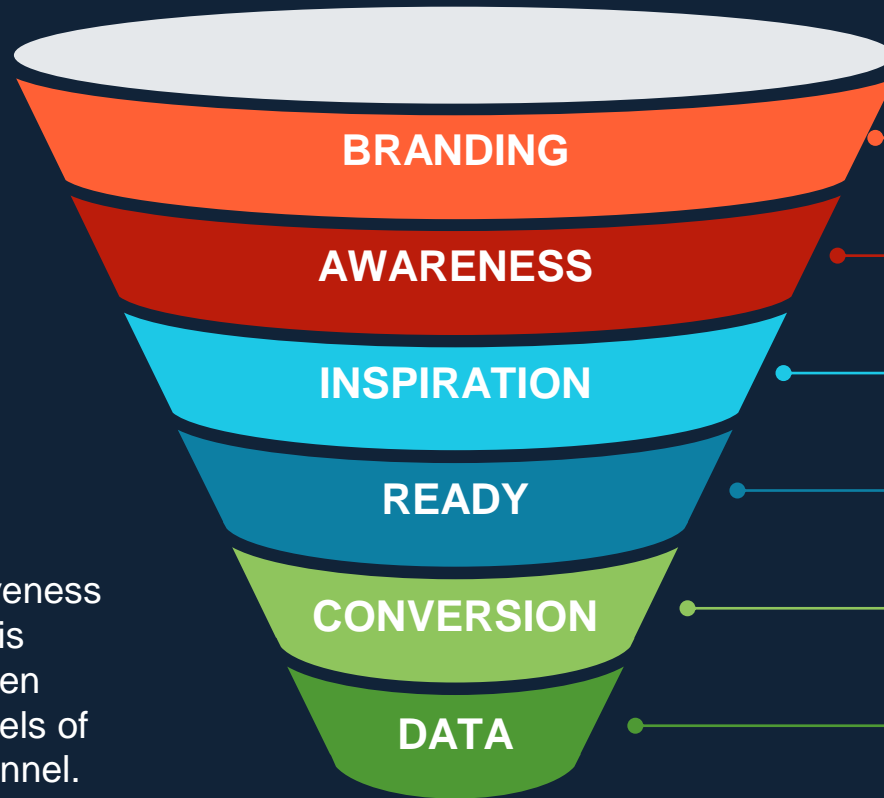


Travel Guide Distribution by State

Top 10 States of Origin	
Maryland	932
New York	846
Pennsylvania	861
Ohio	487
New Jersey	480
Texas	448
Florida	443
Indiana	375
Kansas	299
Michigan	287



Advertising Messaging Funnel



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

Educate target markets of attractions, experiences and assets.

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

Montgomery County is open and ready to welcome visitors again.

Make the booking process super easy across all transactional channels.

Generate data to learn from outcomes, improve campaigns and direct return on investment.

Diversity, inclusiveness and accessibility is continuously woven throughout all levels of the messaging funnel.

Target Markets

Capital Region

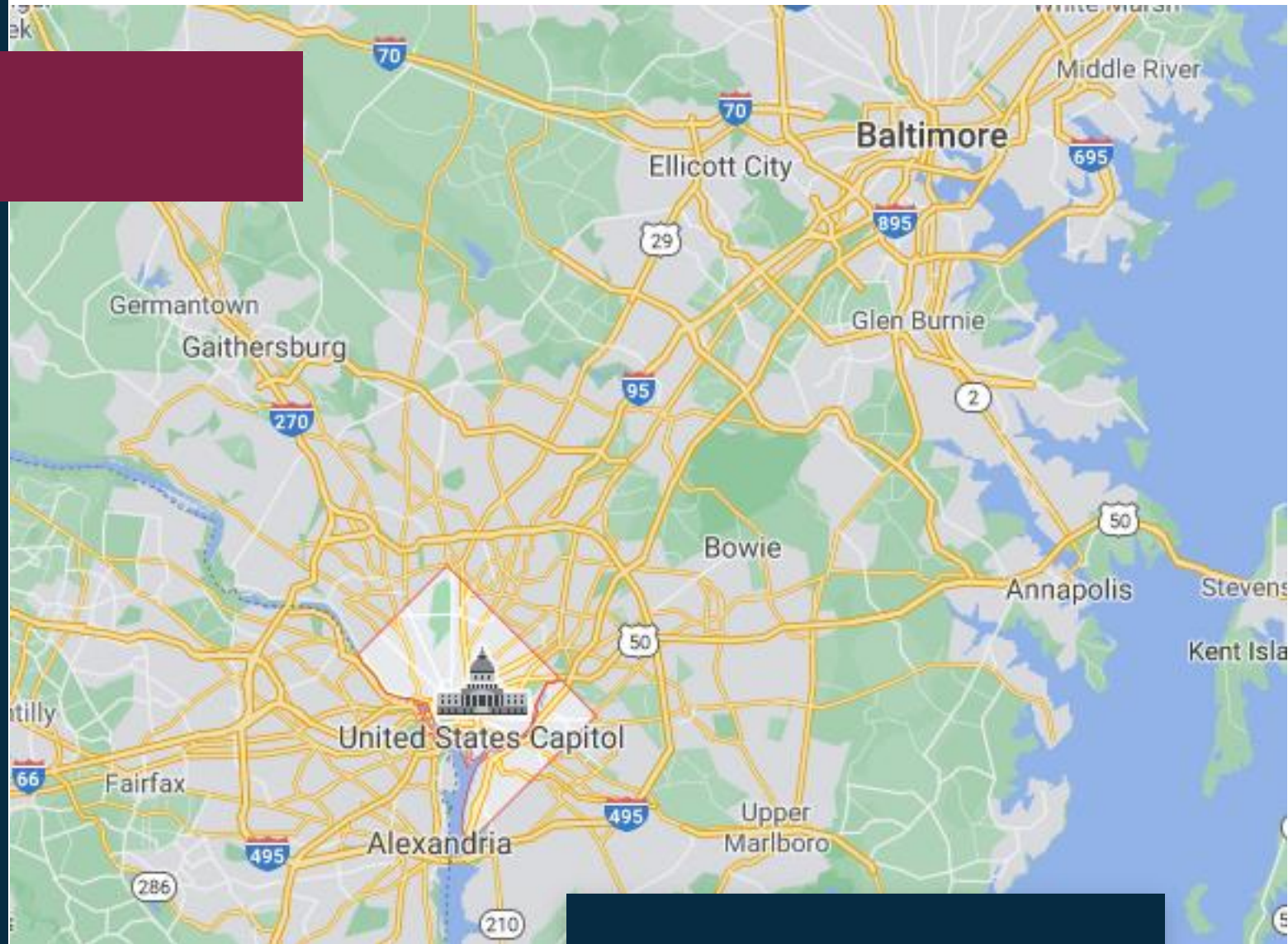
- Montgomery County: 1,051,000
- Washington, DC: 692,683
- Baltimore City & County: 1,436,402
- Northern Virginia: 2,500,000

Road Trip Markets

- Focus on 3-4 hour driving radius
- Pennsylvania, New York, Virginia, West Virginia, and Delaware
- Philadelphia and New York markets demonstrating highest signs of rebound.

Groups & Meetings

- Select promotion in meetings, overnight tour and travel, and day trip segments.



Advertising in fly markets was piloted in partnership with MCEDC at the end of FY 2023.

Advertising Channels & Media Partnerships



Expedia Advertising Campaign July 2022 – June 2023

\$984,470

Montgomery County Gross Hotel Bookings

6,329

Montgomery County Gross Room Nights

\$174,823

Gaithersburg Gross Hotel Bookings

1,151

Gaithersburg Gross Room Nights

Campaigns:

C&O Canal Co-Op

September 2022 – February 2023

Holiday Campaign

November 2022 – January 2023

Spring Campaign

March 2023 – May 2023

Public Relations: July 2022 – June 2023



\$1,103,200

Advertising Equivalency Value

Media Outlets

- Fox 5 DC
- ABC News 7
- WTOP
- DC News Now
- Adventure Cycling Magazine
- Convention South
- Lonely Planet
- WUSA 9
- WASH FM
- DC 101
- National Parks Magazine
- Washington Post
- My MC Media
- Washingtonian
- Axios





New Initiatives

Reflection & Wrap Up

Product Development & New Initiatives



MoCo Eats & Culinary Cultural Initiative

Program launched in 2020 as a restaurant directory and has since expanded into a dedicated brand, including an annual MoCo Eats Week.



New Brand & Messaging

Launched a new brand and messaging strategy for Visit Montgomery with the goal of showcasing the county's diversity and cultural experiences.



Discover MoCo Month

Launched the first pilot of a month-long promotional initiative dedicated to driving awareness of Montgomery County's retail, hotels, attractions and restaurants.



Adventure Planner App

Available on Apple and Google Play stores, the new app is designed to provide an itinerary planning and discovery tool for residents and visitors.



Organizational Rebrand & Messaging Strategy

EXPLORE LIKE NEVER BEFORE

VISIT MONTGOMERY
MARYLAND'S CULTURAL CAPITAL™

START PLANNING >

Maryland MONTGOMERY COUNTY

OUTDOOR ADVENTURES
NEXT DOOR TO WASHINGTON, DC

ENTIRELY MARYLAND. DISTINCTLY DIFFERENT.

Throughout our thriving urban centers and along the C&O Canal, National Historical Park, explore Montgomery County, Maryland like never before. Stay in historic or upscale lodges and inns and enjoy Get a taste of the real side of life from breweries and wineries in Poolesville. Be in Maryland's Cultural Capital, diversity and the season are woven into the fabric of our communities. Your next outdoor gateway destination to the nation's capital is only a 2-hour drive on the Capital Beltway.

VISIT MONTGOMERY
MARYLAND'S CULTURAL CAPITAL™

LEARN MORE AT VisitMontgomery.com/weekend

Maryland MONTGOMERY COUNTY

TAKE AN AFRICAN AMERICAN HERITAGE ROAD TRIP
IN MONTGOMERY COUNTY, MARYLAND

Connect the paths from past to present in Montgomery County, Maryland. Visit the Joseph Horner Museum and Park to delve into the inspiring life of abolitionist Joseph Horner. Continue the exploration of rich history through interactive exhibits at Woodlawn Manor Cultural Park. To savor the local flavors, stop at All Set Restaurant for a contemporary spin on classic comfort foods. Experience it all and more in Maryland's Cultural Capital, just minutes from Washington, DC.

Download the Visit MoGo Adventure Planner app to start planning your weekend in Montgomery County. Map out your heritage stops, add in restaurants, breweries and wineries, then share with your friends!

VISIT MONTGOMERY
MARYLAND'S CULTURAL CAPITAL™

LEARN MORE

Maryland MONTGOMERY COUNTY

ELEVATE YOUR HOLIDAY IN GAITHERSBURG

Gaithersburg is aglow with winter wonder this holiday season. From festive light displays, to diverse shopping and restaurants, you'll find endless ways to elevate your joy in Montgomery County, just a short drive from Washington, DC.

LEARN MORE AT VisitMontgomery.com/holiday

VISIT MONTGOMERY
MARYLAND'S CULTURAL CAPITAL™

Maryland MONTGOMERY COUNTY

VISIT MONTGOMERY

MARYLAND'S CULTURAL CAPITAL™



BRAND IN USE



Lee Callicutt and Trek Booker at a PCMA event.



Cory Van Horn and Kelly Groff with Montgomery County Executive Marc Elrich wearing the new brand.

Maryland Association of Counties
Taste of Maryland

Shop MoCo Week

April 30 - May 6

National Small Business Week

MoCo Hotel Week

May 7 - 13

National Travel & Tourism Week

MoCo Eats Week

May 14 - 20

Third Annual MoCo Eats Week

MoCo's Kick Off to Summer Week

May 21 - 31

Memorial Day Weekend

Discover MoCo Month – May 2023

Celebrating Montgomery County's Entrepreneurial Spirit in Four Amazing Weeks



DISCOVER MOCO MONTH METRICS

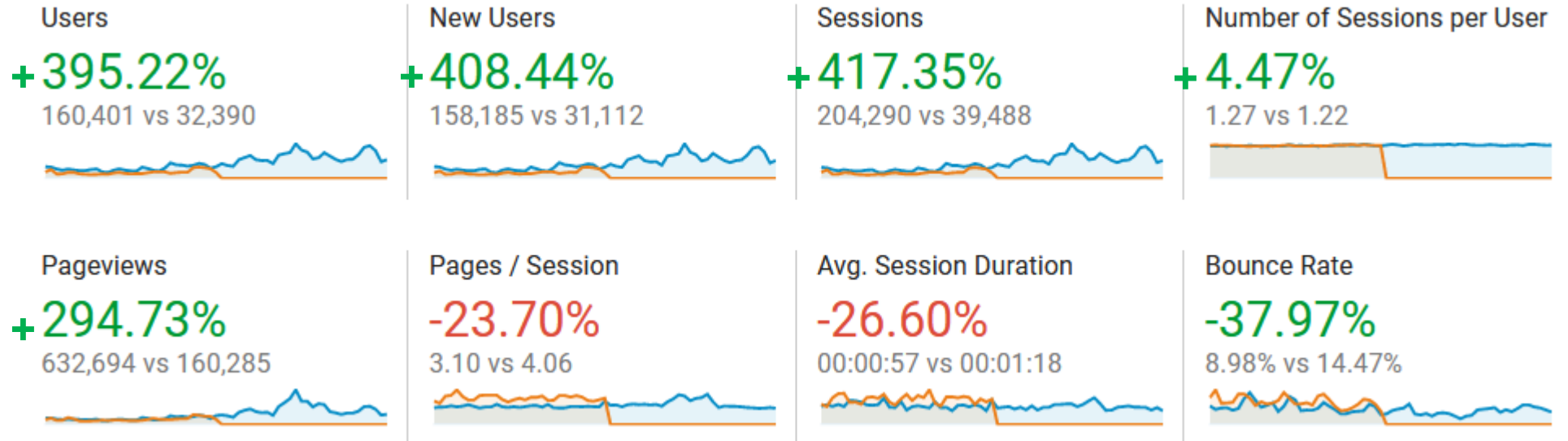
APRIL - MAY 2023 WEBSITE ACTIVITY

461,294 Total Campaign Pageviews

Campaign Week Pageviews	Pageviews
Shop MoCo Week	5,945
MoCo Hotel Week	23,216
MoCo Eats Week	102,571
Kick Off to Summer	25,171
Total	156,903

Microsite + Deals + Directories	Pageviews
Discover MoCo Microsite	110,620
Discover MoCo Directory	19,406
MoCo Eats Directory	102,571
Deals Directory	71,794
Total	304,391

Overall Website Performance



DISCOVER MOCO METRICS APRIL - MAY 2023 APP ACTIVITY

- 19,608 Pageviews
- 2,292 Users
- 3:03 Avg Duration
- 2,346 Sessions
- 836 Downloads



**4 Passports Created +
Tastemakers Trail**

**70 Businesses
Participated**

836 Downloads

DISCOVER MOCO METRICS APRIL - MAY 2023 SOCIAL MEDIA ENGAGEMENT

Across All Social Channels

- 2,100,000 Impressions
- 1,700,000 Users
- 222 Social Posts
- 156,000 Post Reach
- 175,000 Post Impressions



Strategic Collaborations

Visit Montgomery fostered and developed strategic collaborations that helped support and expand Visit Montgomery's mission to promote Montgomery County as destination with a wide-range of experiences available for residents and visitors to enjoy.

Notable Projects & Programs:

- **Explore Rockville:** Launched a dedicated website for promoting things to do in Rockville, in partnership with Rockville Economic Development, Inc. (REDI).
- **Heritage Days:** Collaborated with Heritage Montgomery to host a digital passport on the Visit MoCo Adventure Planner App.
- **MoCo Farm Tour:** Partnered with Montgomery County Office of Agriculture to include Farm Tour businesses on the Visit MoCo Adventure Planner App.
- **Microsite Program:** Worked closely with communities to launch a series of microsites on VisitMontgomery.com.



DISCOVER MOCO MONTH PRESS COVERAGE

- 4 “edible deskside” meetings with local journalists.
- 10 iHeart Radio food drops for on air mentions.
- 16 Television & Radio Appearances
- Wanderful Ladies influencer FAM held April 29. (10 participants)
- Foodie & The Beast Radio Show interviews throughout April and May
- Industry Night round table podcast interview held April 12.
- MoCo Eats Week TV & Digital Press



WASHINGTONIAN

12 Dining Deals to Check Out During Montgomery County's Eats Week

Score free ice cream, churros, and more.

WRITTEN BY TORY BASILE | PUBLISHED ON MAY 17, 2023

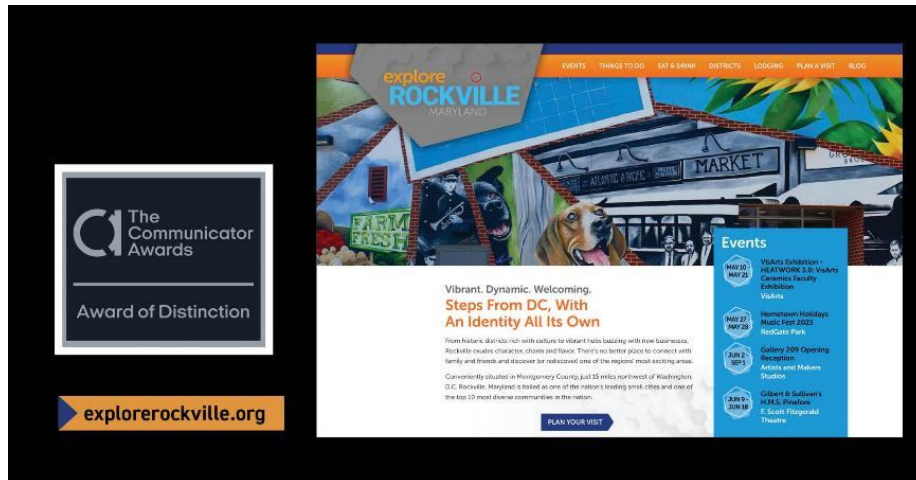


MoCo Eats kicks off celebrating culinary diversity

AXIOS D.C.

The best deals during Montgomery County's Eats Week

Awards & Accolades





Sales Division

Reflection & Wrap Up

Sales Leads & Booking Production

Lead Production Detail

Leads	Room nights	Economic Impact
547	200,545	\$43,318,623

Booking Production Detail

Booked	Room nights	Economic Impact
168	26,029	\$4,995,993

Sales Leads & Booking Production

Fiscal Year 2019 to 2023

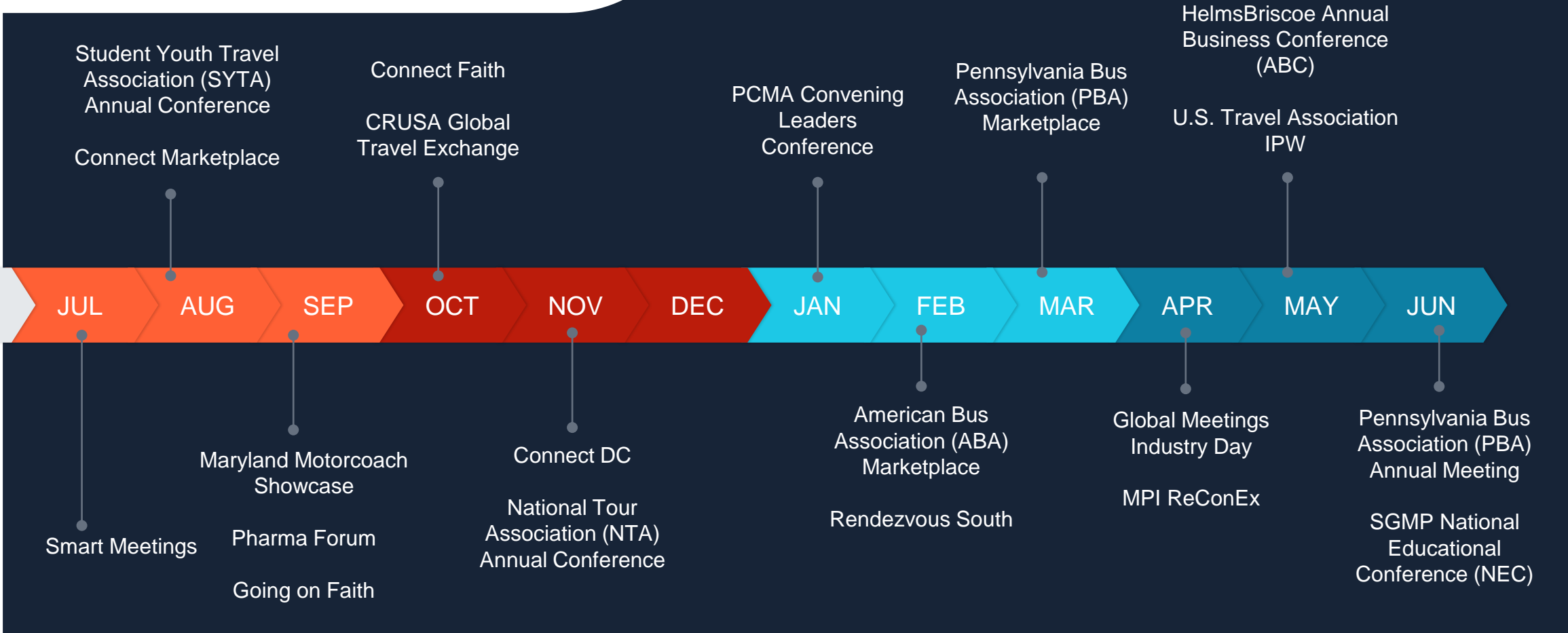
Lead Production Detail	2019	2020	2021	2022	2023
Leads	380	338	147	352	547
Room Nights	103,885	94,936	72,257	106,869	200,545
Economic Impact	\$17,246,968	\$19,850,408	\$15,483,105	\$22,631,677	\$43,318,623

Booking Production	2019	2020	2021	2022	2023
Leads	138	135	48	142	168
Room Nights	23,673	23,507	35,987	28,380	26,029
Economic Impact	\$4,804,352	\$4,951,371	\$8,241,885	\$7,294,948	\$4,995,993

Bookings by Market Segment

Market Segment	# of Bookings
Association	16
Bio Tech	27
Corporate	7
Educational	11
Government	6
Health	1
Military	2
Religious	6
Reunion	2
Social	3
Sports/Competition	10
Tour & Travel	77
TOTAL	168

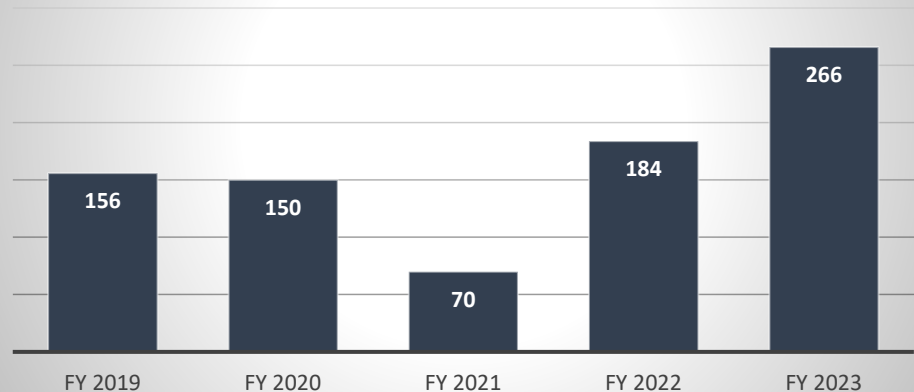
Trade Shows Fiscal Year 2023



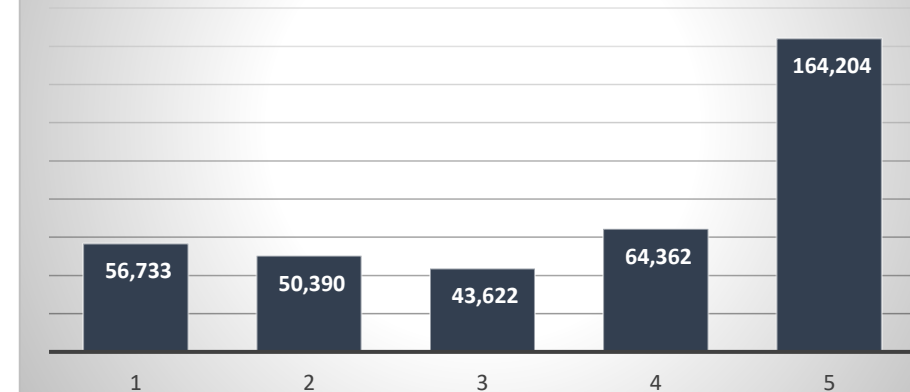
CVENT Booking Trends – Visit Montgomery

Destination Statistics	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023
DMO RFPs	156	150	70	184	266
DMO Room Nights	56,733	50,390	43,622	64,362	164,204
DMO RFP Value	\$ 28,926,036	\$ 23,281,609	\$ 15,685,740	\$ 25,142,287	\$ 57,563,482
Awarded RFPs when DMO copied	41	33	6	70	67
Awarded Room Nights when DMO copied	6,538	3,396	2,202	8,183	5,877

**Visit Montgomery
Request for Proposals (RFPs)**



**Visit Montgomery
Room Nights**



CVENT Booking Trends – Destination

Territory Statistics	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023
Unique RFPs	1,283	981	290	670	1,012
Unique Room Nights	282,444	217,958	106,687	195,683	428,045
Unique RFP Value	\$ 111,525,876.00	\$ 92,520,713.00	\$ 42,149,377.00	\$ 777,746,706.00	\$ 152,326,378.00
Awarded RFPs	362	287	90	168	237
Awarded Room Nights	26,779	23,911	6,128	21,537	26,863
Awarded Value	\$ 8,458,449	\$ 7,205,850	\$ 1,466,486	\$ 6,089,810	\$ 8,529,946
Turn Down Rate	36%	37%	24%	32%	38%
%Turned Down when planner is flexible	40%	26%	27%	32%	42%

Trade Association Affiliations & Accreditations



- American Society of Association Executives (ASAE)
- American Bus Association (ABA)
- Christian Management Conference Assoc (CMCA)
- Destinations International (DI)
- Maryland Destination Marketing Organizations (DMO)
- Maryland Tourism Coalition (MTC)
- Maryland Hotel Lodging Association (MHLA)
- Meeting Professionals International (MPI) - Potomac Chapter
- Meeting Professionals International (MPI) - Philadelphia Chapter
- Mid Atlantic Tourism Public Relations Alliance (MATPRA)
- National Tour Association (NTA)
- Professional Conference Management Assoc. (PCMA)
- Religious Conference Management Association (RCMA)
- Society of Government Meeting Professionals (SGMP)
- Student Youth Travel Association (SYTA)
- U.S. Travel Association



Society of Government Meeting Professionals





Sports Tournaments

Soccer & Other Youth Sports

Youth Sports



Event Name	Sport	Dates	FY 2023 Actual Room nights
Lacrosse World Series	Lacrosse	July 1-4 2022	1281
Crossover Hoops	Basketball	July 8-19, 2022	46
Pinnacle Lacrosse	Lacrosse	July 15-17, 2022	1,019
EDP Fall Kick Off Soccer	Soccer	August 20-21, 2022	82
August Cup Soccer Tournament	Soccer	August 27-28, 2022	45
Discovery Cup Soccer Tournament	Soccer	October 8-9, 2022	1,137
Big East Womens Championship	Soccer	Nov 1-6, 2022	307
Big East Men's Championship	Soccer	Nov 8-12, 2022	254
Bethesda Girl's Soccer Tournament	Soccer	Nov 12-14, 2022	3,650
Bethesda Boy's Soccer Tournament	Soccer	Nov 19-21, 2022	5,448
National Collegiate Rugby	Rugby	April 28-30, 2023	2,225
USA Volleyball ID Event	Volleyball	May 5-7, 2023	321
MLS Next Qualifiers	Soccer	May 11-16, 2023	3,685
Potomac Memorial Soccer Tournament	Soccer	May 26-29, 2023	4,302
Mid-Atlantic Cup	Soccer	June 10-12, 2023	219
IWLCA (Intercollegiate Women's Lacrosse)	Lacrosse	June 16-18, 2023	3,645
Laxin Out Loud Lacrosse Tournament	Lacrosse	June 24-26, 2023	393
Naptown Challenge	Lacrosse	June 26-17, 2023	1,327



Visit Montgomery Fiscal Year 2023 - Revenues



■ Hotel Taxes ■ Grants ■ Montgomery County Supplemental ■ Private Funds

Visit Montgomery Fiscal Year 2023 - Expenses



■ Operating ■ Advertising ■ Marketing ■ Personnel ■ Sales



Where We've Been

A Year in Review – Fiscal Year 2023











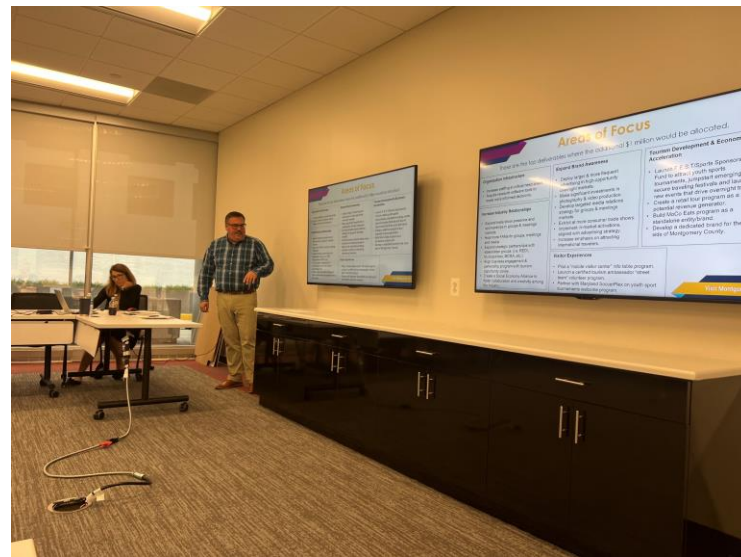
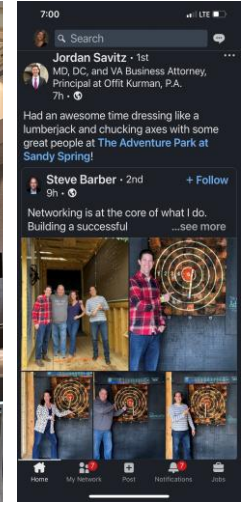














Thank You

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