



MARYLAND TOURISM DEVELOPMENT BOARD

QUARTERLY MEETING MINUTES

APPROVED 11.17.25

September 19, 2025 | 10:00 AM- 12:00 PM

Hyatt Place Kent Narrows - 3028 Kent Narrows Way S, Grasonville, MD 21638

MEMBERS PRESENT

Robert Arthur, The Ivy Hotel
Todd Burbage, Blue Water
Andrew Frank, Cap Advisory
Del. Wayne Hartman, Maryland House of Delegates
Gerardo Martinez, Wild Kid Acres, LLC
James Mathias, University of MD Eastern Shore
Al Spence, A.S. Midway Tours
Sandy Turner, Cecil County Tourism
Cassandra Vanhooser, Talbot County Department of
Economic Development and Tourism

MEMBERS ABSENT

Ashley Chenault, Charles County Tourism
Dave Ferraro, Friends of Patapsco Valley State Park
Tonya Fitzpatrick, Esq., World Footprints, LLC
Melonie Johnson, MGM National Harbor
Senator Nancy King, Maryland State Senate
Juan Carlos Linares, Federal Realty Investment Trust
Senator Johnny Mautz, Maryland State Senate
Leverne McElveen, Leverne McElveen & Associates, LLC
Chris Riehl, Rent-A-Tour
Ben Seidel, Real Hospitality Group
Shelonda Stokes, Downtown Partnership
Del. Melissa Wells, Maryland House of Delegates

ADVISORY COMMITTEE/EXECUTIVE COUNCIL PRESENT

Janna Howley, Maryland Wineries Association Ruth Toomey, Maryland Tourism Coalition

DESTINATION MARYLAND ORGANIZATIONS (DMO) PRESENT

Shayln Boulden, Kent County Office of Tourism April Plummer, Queen Anne's County Economic &
Development Tourism Development
Kristen Goller, Talbot County Department of Economic Dan Spedden, Visit Hagerstown, Washington County CVB
Development and Tourism Heather Tinelli, Queen Anne's County
Kelly Groff, Visit Montgomery Tom Yorke, Baltimore County Tourism and Promotion
Trish McCean, Visit Baltimore Office of Communications
Kristen Pironis, Annapolis and Anne Arundel County Dave Ziedelis, Visit Frederick
CVB

COMMERCE STAFF PRESENT

Peter Ayeni, Asst Manager, Tourism Development Cindy Miller, Strategic Partnerships
Rich Gilbert, Travel Trade Marci Ross, Acting Managing Director, Office of Tourism
Lisa Hansen Terhune, Destination Development and Film; Acting Executive Director, MTDB
Brian Lawrence, Advertising and Content Rianna Wan, Research

I. Welcome and Call Meeting to Order

Vice Chair/Transportation Al Spence called the meeting of Friday, September 19, 2025, to order and noted that the meeting is being recorded. Spence welcomed everyone and introduced Heather Tinelli who welcomed all to Kent Narrows. Heather stressed the importance of tourism in the state and handed it over to April Plummer who shared a few key events and developments happening in Queen Anne's county.

Spence facilitated introductions of the board members and read the Open Meetings Act.

II. Approval of June 13, 2025 Minutes

Vice Chair Spence asked if all had read the June 13, 2025 board meeting minutes and if subsequently, called for a motion to accept the minutes. Burbage made the motion to approve and it was seconded by Vanhooser; Spence asked for discussion and hearing none, asked for a roll call for all in favor: "For" - Arthur, Burbage, Frank, Hartman, Martinez, Spence, and Vanhooser; all were in favor with no abstentions so the motion carried. Acting Executive Director Marci Ross reminded all that the meeting was being recorded in order to capture votes, decisions made and discussion.

III. Chair and Acting Executive Director's Updates

Vice Chair asked Ms. Ross to share the Acting Executive Director's updates. She reminded the board that there are three vacancies - two (2) House Appointees and one (1) Gubernatorial Appointee-Attractions Sector-Western Maryland. She shared that we have been waiting to hear from the Speaker of the House who is aware of the vacancies. Further, we've been waiting to put forth recommendations for the Gubernatorial position as the Department of Commerce recently created new nominating procedures, which will make the process more efficient.

MTDB Bylaws - Resolution, Motion to Amend

- 1. According to the June 2011 Bylaws, Section 1.3:**

(b) Non-Voting Members. Any members who are directors or chief executive officers of a Destination Marketing Organization are non-voting members, and are not entitled to vote on any matter before the Board.
- 2. According to the Statute (Economic Development Article), Section 4-204 (a) (2):**

(2) three members appointed by the Governor who are directors or chief executive officers from among the destination marketing organizations officially recognized by the Office;

Ross shared that we have been uncovering board history and found the 2011 Bylaws. She indicated that the Bylaws should be reviewed at another time, noting, however, the section regarding Destination Marketing Organizations (DMO) as non-voting members is no longer valid due to a 2017 statute change making them voting members.

Vice Chair Spence called for a motion to amend the Bylaws to indicate Board Member DMOs eligible to vote. Vanhooser made the motion to amend the Bylaws to reflect the current legislation; it was seconded by Frank; Spence asked for discussion and hearing none, asked for a roll call for all in favor: "For" - Arthur, Burbage, Frank, Hartman, Martinez, Spence, and Vanhooser; all were in favor, none opposed with no abstentions so the motion carried.

Committees

1. Resolution-Motion to Formally Name Committees
2. Reports

Marketing

Legislative/Education

Elections/Nominations

Strategic Planning

Ross then noted that the Board's Committees, which were established at previous meetings in 2024 and 2025, now require formal naming through a resolution.

Vice Chair Spence called for a motion to formally name the board committees as Marketing, Legislative/Education, Elections/Nominations and Strategic Planning. Burbage made the motion to formally name the board committees; it was seconded by Turner; Spence asked for discussion and hearing none, asked for a roll call for all in favor: "For" - Arthur, Burbage, Frank, Hartman, Martinez, Spence, and Vanhooser; all were in favor, none opposed with no abstentions so the motion carried.

Vice Chair Spence then asked for committee reports. Ross stressed that these are board committees, each requiring at least three board members, and that OTD will provide staffing and advice. Mathias requested the committee membership lists, and staff confirmed they would provide them.

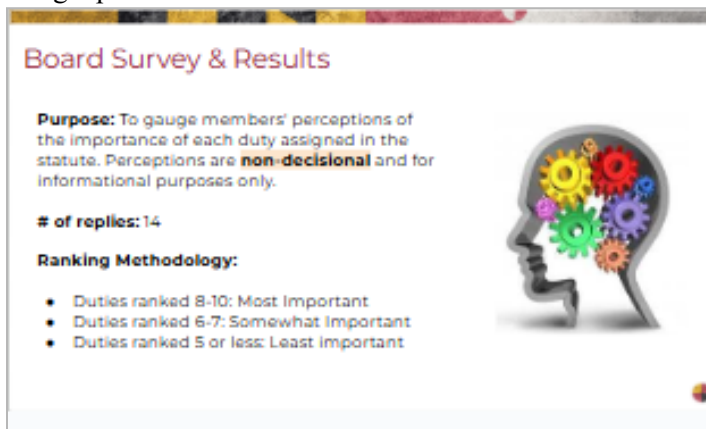
Ross asked if any members may want to give an update from the recent Marketing Committee Meeting being that no chair has been determined. The response was that the members of the committee were not prepared to report out at this time. Cassandra Vanhooser said she would be happy to provide a written report at the next meeting.

Ross offered a quick summary of the previous meeting, which all attendees approved. She reported that the August meeting featured an extensive discussion on research. The advertising agency presented data on advertising spend and its return on investment (ROI). The committee also reviewed sales and use tax data, as required by statute. Ross noted that the advertising ROI showed a significant impact, even though some Smith Travel lodging research indicated a recent decline in visitor impact/spending. Ross advised the need to examine performance metrics to ensure the best advertising decisions are made. Vanhooser added that she felt members believed they should adopt a more flexible approach to advertising. Trish McClean supported Ross's point, suggesting a review of all research to avoid overlooking challenges facing the industry. Mathias inquired if an analysis of media placement types and their results had been conducted. Ross replied that this data exists from previous years, and the media buying plan for FY26 has not yet been finalized, as they are awaiting the final budget numbers from DBM. A more detailed plan will be shared with the board at the November 17 meeting once the budget is received.

Next, Ross shared that the Legislative/Education Committee (LEC) recently held its first meeting, virtually. Delegate Wayne Hartman reiterated that he attended the meeting but that he was not prepared for a full report. He continued saying essentially the conversation was about how MTDB can look to garner more guaranteed funding in order to expand marketing. Co-chair Chris Riehl, who was absent, provided a brief report summarizing the recent Legislative Committee meeting. Ross noted that the staff-sent board survey, intended to gauge members' perceptions of each statutory duty for informational, non-decisional purposes, could inform discussions and plans for both the LEC and Strategic Planning Committees, particularly regarding future budget and time allocation. Vanhooser added that the Marketing Committee shared a similar interest in the survey results.

Sandy Turner reported the Election/Nominations Committee will be activated shortly. She commented that it was discussed at the June 13 2025 the need to realign the election cycle back to a fiscal year therefore elections are planned for the June 2026 board meeting.

Ross reported the Strategic Planning Committee has not met. She also shared that she and Lisa have been discovering new things as they gain understanding of statute and one of the things that has been uncovered is that the last strategic planning process began in October of 2019, then Covid hit. For about two years, Ross shared, the board operated under what was known as the tourism recovery plan. Then, she continued, an internal decision was made to not reignite the process until there was enough tourism recovery growth and when it made sense. Now, in looking at the tourism economic report, it shows we are now three years of sustained growth so the time is now to endeavor a new five year strategic plan.



Board Survey & Results

Purpose: To gauge members' perceptions of the importance of each duty assigned in the statute. Perceptions are **non-decisional** and for informational purposes only.

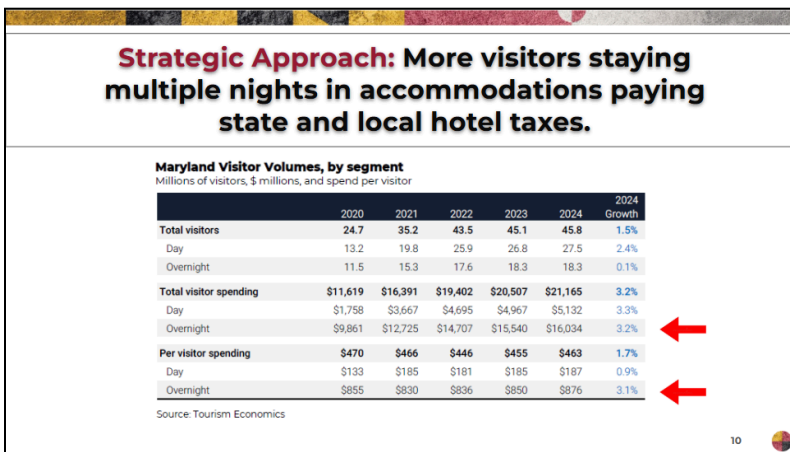
of replies: 14

Ranking Methodology:

- Duties ranked 8-10: Most Important
- Duties ranked 6-7: Somewhat Important
- Duties ranked 5 or less: Least Important

The slide features a graphic of a human head profile filled with colorful gears, symbolizing thought and strategy.

A board member survey, conducted to inform and develop a scope of work for a facilitator, asked members to rank statutory board duties. Ross shared results from 14 responses, noting that "most important" rankings included the annual marketing plan, producing a strategic plan, and inter-county cooperation. She advised board committees to use these results to determine priorities and define success. Vanhooser reminded the board the duties were directly from the statute. Ross added that Commerce's general counsel recommended reviewing the compiled statute for future changes rather than past individual legislation.



Strategic Approach: More visitors staying multiple nights in accommodations paying state and local hotel taxes.

Maryland Visitor Volumes, by segment
Millions of visitors, \$ millions, and spend per visitor

	2020	2021	2022	2023	2024	2024 Growth
Total visitors	24.7	35.2	43.5	45.1	45.8	1.5%
Day	13.2	19.8	25.9	26.8	27.5	2.4%
Overnight	11.5	15.3	17.6	18.3	18.3	0.1%
Total visitor spending	\$11,619	\$16,391	\$19,402	\$20,507	\$21,165	3.2%
Day	\$1,758	\$3,667	\$4,695	\$4,967	\$5,132	3.3%
Overnight	\$9,861	\$12,725	\$14,707	\$15,540	\$16,034	3.2%
Per visitor spending	\$470	\$466	\$446	\$455	\$463	1.7%
Day	\$133	\$185	\$181	\$185	\$187	0.9%
Overnight	\$855	\$830	\$836	\$850	\$876	3.1%

Source: Tourism Economics

Two red arrows point to the 'Overnight' spending rows in the table.

Ross emphasized that the core priority for MTDB is inspiring visitors to stay multiple nights, as this directly correlates with higher contributions to state and local sales and use taxes. Referencing the 2024 Tourism Economics Report, she highlighted that visitors who stay one or more nights account for over three-quarters of all visitor spending. Therefore, while day-trippers are valued, the focus of all MTDB initiatives is to encourage overnight stays for maximum economic impact.

FY26 Budget-Revised, Subject to fund availability, change & regulatory/contractual obligations

DESCRIPTION: This is the revised FY26 MTDB Budget as of 9/19/25. It is subject to availability of funds, change and regulatory/contractual obligations. Red numbers represent regulatory/contractual obligations. Yellow highlighted cells are fully or partially discretionary.

BUDGET ITEM:	FY26 Estimated	FY26 Actual	FY26 NOTES:
Total Budget:	\$15,493,600	\$12,310,300	
Dept. of Legislative Services Budget Reduction	(\$3,183,300)	(\$127,000)	Department of Budget & Management Federal Funds allocation error
	\$12,310,300	\$12,183,300	Actual budget amount received from DBM, less \$127,000 in Federal Funds
Winery and Vineyard Economic Development Grant Program	(\$1,000,000)	(\$1,000,000)	Legislatively mandated; Staffed by OTD
MD Alcohol Promotion Fund Grant Program	(\$1,600,000)	(\$1,600,000)	Legislatively mandated; Staffed by OTD
Motor Vehicle Operation	(\$1,500)	(\$1,500)	Department of Budget & Management (DBM) set this amount; it is unchangeable
Subtotal after Regulatory Deductions:	\$9,708,800	\$9,581,800	
DMO Grant Program	(\$2,500,000)	(\$2,500,000)	Legislatively mandated; Staffed by OTD
Subtotal after DMO Grant Program Regulatory Deduction:	\$7,208,800	\$7,081,800	
Research	(\$72,000)	(\$72,000)	DK Shiftlet research contract; Other contracts being pre-paid with FY25 funds
Fulfillment	(\$115,100)	(\$115,100)	DBM set this amount; unspent amount can be reassigned
Digital Development/Database Services	(\$200,000)	(\$200,000)	Technical support contract for industry database
Marketing Maryland Scenic Byways (Match)	(\$141,500)	(\$141,500)	Leverages \$566,000 in federal funds per the grant agreement
Domestic/International Sales			Transfer to OTD budget
PR & Social Media	(\$200,000)	(\$200,000)	\$50K in Contracts, \$150K in Content Creation and SM advertising placement
Special Funds allocated to offset Ad Sales	(\$400,000)	(\$400,000)	DBM set this amount; unspent amount can be reassigned
MTDB Strategic Plan	(\$75,000)	(\$75,000)	Hiring the facilitator and logistics
MTDB Ops Cost		(\$40,000)	New since 6/13/25 approval
Contingency Funds	(\$100,000)	(\$100,000)	Recommended; discretionary
Subtotal:	(\$1,303,600)	(\$1,343,600)	
Print & Digital Media (Placement & Production)	\$5,905,200	\$5,738,200	
Miles		(\$170,000)	No retainer, non-DMM printing costs only
Mojo		(\$515,000)	Annual retainer = \$290,000 + \$225,000 Web Maintenance
Video Contractor		(\$390,000)	Annual Retainer = \$240,000 + \$150,000 Video Production
Marriner - projected		(\$4,663,200)	Annual retainer = \$684,000 + \$100,000 Printing + \$50,000 Canadian PR + \$3,829,200 Media Placement
Balance:		\$0	

Ross presented a revised budget, updated since the June presentation with new figures from the Department of Budget and Management (DBM).

Key Updates:

- A new line item (second line down, in purple) was noted, which Ross stated DBM indicated was an error—a past, unremoved spend.
- A new, previously unseen line item for \$40K for board operational costs (e.g., meeting and travel expenses) was added. These expenses were potentially covered by the OTD budget in the past, but the OTD travel budget may be reduced this year.

Budget Item Classification:

- Line items at the top are mandated by legislation or contract.
- Items highlighted in yellow are considered discretionary or somewhat discretionary.
- The last four lines are dedicated to contracted vendor obligations for retainers in print, web, and video production.

The media placement figure is about \$3.9 million which will inform the decision of whether or not to run a holiday, winter, and/or spring/summer advertising campaign. A question was asked to clarify how the FY26 numbers reflect the legislatively mandated FY26 reduction of \$3.1 million. *Ross responded that the reduction was achieved by pre-paying some costs with FY25 funds, eliminating the board's discretionary grant fund and reducing the media budget.

A discussion ensued on the topic of tourism advertising return on investment and the need to make a case for what happens when a tourism budget is cut. Further, comments relayed that legislative representatives may believe the "tourists will come anyway" even if the tourism promotion budget is cut. Board members commented on the need to show examples (case studies) of what happens when budgets are cut and also what positive impact happens when the investment increases, such as those in surrounding states. Last summer, for example, many beach areas outside of Maryland did very well compared to Ocean City because those area states had significant advertising campaigns. The outcome of the discussion is to further explore how positive messages about investment can be shared with different audiences.

*A member commented the June 13 minutes showing the budget was difficult to read due to size and Ross stated we would recirculate it in follow up, here:

PURPOSE: This document is confidential. It is the proposed FY26 MTDB Budget as approved by the Marketing Committee on 5/19/25. Red numbers are non-discretionary deductions and their amounts cannot be changed. Yellow highlighted cells are fully or partially discretionary. Their amounts can be changed.

BUDGET ITEM:	FY25	FY26	FY26 NOTES:
Total Budget:	\$15,493,600	\$15,493,600	
Dept. of Legislative Services Budget Reduction		(\$3,183,300)	Legislatively mandated budget reduction
Winery and Vineyard Economic Development Grant Program	(\$1,000,000)	(\$1,000,000)	Legislatively mandated; Staffed by OTD
MD Alcohol Promotion Fund Grant Program	(\$1,600,000)	(\$1,600,000)	Legislatively mandated; Staffed by OTD
Motor Vehicle Operation	(\$1,500)	(\$1,500)	Department of Budget & Management (DBM) set this amount; it is unchangeable
Subtotal after Regulatory Deductions:	\$12,892,100	\$9,708,800	
DMO Grant Program	(\$2,500,000)	(\$2,500,000)	Legislatively mandated; Staffed by OTD
Subtotal after DMO Grant Program Regulatory Deduction:	\$10,392,100	\$7,208,800	
Research	(\$315,000)	(\$72,000)	DK Shifflet research contract; Other contracts being pre-paid with FY25 funds
Fulfillment	(\$90,000)	(\$115,100)	DBM set this amount; unspent amount can be reassigned
Digital Development/Database Services	(\$350,000)	(\$200,000)	Technical support contract for industry database
Marketing Maryland Scenic Byways (Match)	(\$140,000)	(\$141,500)	Leverages \$566,000 in federal funds per the grant agreement
Domestic/International Sales	(\$599,460)		Transfer to OTD budget
PR & Social Media	(\$200,000)	(\$200,000)	\$50K in Contracts, \$150K in Content Creation and SM advertising placement
Special Funds allocated to offset Ad Sales	(\$400,000)	(\$400,000)	DBM set this amount; unspent amount can be reassigned
MTDB Strategic Plan		(\$75,000)	Hiring the facilitator and logistics
Contingency Funds		(\$100,000)	Recommended; discretionary
Subtotal:	(\$2,094,460)	(\$1,303,600)	
Print & Digital Media (Placement & Production)	\$8,297,640	\$5,905,200	NY, Philadelphia, Pittsburgh, Washington, D.C. and Baltimore
Marriner			Estimates for FY26 costs are due in late July 2026; includes Canadian PR costs
Miles			Estimates for FY26 costs are due in late July 2026
Mojo			Estimates for FY26 costs are due in late July 2026
Video Agency			Estimates for FY26 costs are due in late July 2026

DMO Grant Program Update

FY25: Awaiting two final reimbursement requests, then close out

FY26:

Now: DMO Marketing Plan Forms are under review, grant application kits being developed

9/30/25: OTD reviews co-op program data and proposed co-op plan

Week of 10/6/25: Co-op plan distributed to DMO's

11/12/25: Last day to submit FY26 Application Kits to OTD

12/31/25 End of the July-December spending period

01/31/26 Due date – Last day to submit reimbursement requests for July - Dec 2025

Next Ross provided DMO Grant Program status update indicating the close of the FY25 program is nearly complete. To prepare for FY26, DMOs were asked to complete their marketing survey which included gauging their interest in co-op plans. As a result, the advertising agency is currently focused on identifying new and affordable cooperative opportunities for the current fiscal year, according to Ross.

IV. Portfolio Update

OTD staff presented activities related to implementing the portfolio of programs of the Board and OTD FY26 budget.

Development - Research



For the 2024 Economic Impact of Tourism in Maryland, please visit:
<https://industry.visitmaryland.org/industry-research-reports#main>

Research Analyst Rianna Wan presented the 2024 Economic Impact of Tourism Report, which is also posted on [Industry.VisitMaryland.org](https://industry.visitmaryland.org).

Key Economic Impact Findings of Tourism in Maryland - Calendar Year 2024

Tourism in MD	2019	2020	2021	2022	2023	2024
Total Visitors (Domestic & International)	42.1 million	24.7 million	35.2 million	43.5 million	45.1 million	45.8 million
Visitor Spending	\$18.6 billion	\$11.6 billion	\$16.4 billion	\$19.4 billion	\$20.5 billion	\$21.2 billion
Visitor Spending Growth	3.0%	-37.6%	42.0%	18.4%	5.7%	3.2%
Total Economic Impact	30.3 billion	20.9 billion	26.4 billion	\$30.3 billion	\$31.4 billion	\$32.3 billion
Fiscal Contributions (State & Local taxes)	\$2.6 billion	\$1.7 billion	\$2.1 billion	2.3 billion	2.4 billion	2.5 billion
Tax Savings (For each household)	\$1,175	\$775	\$923	\$999	\$1,027	\$1,051
Tourism Supported Jobs (Direct and Indirect)	226,427 jobs	166,000 jobs	173,700 jobs	187,296 jobs	190,660 jobs	193,845 jobs
Tourism Industry Employment (Direct jobs)	149,991 jobs	104,328 jobs	112,879 jobs	123,617 jobs	126,977 jobs	130,444 jobs
Direct Income generated by Tourism	\$6.6 billion	\$4.9 billion	\$5.3 billion	\$6.0 billion	\$6.4 billion	\$6.6 billion
Total Income generated by Tourism	\$10.6 billion	\$8.1 billion	\$8.7 billion	\$9.7 billion	\$10.1 billion	\$10.5 billion
Private sector employer in Maryland ranking	11th	12th	12th	10th	11th	11th

Source: Tourism Economics

For the 2024 Economic Impact of Tourism in Maryland, please visit: <https://industry.visitmaryland.org/industry-research-reports#main>

CY 2024 Visitation and Spending of Tourism in Maryland



In 2024, Maryland welcomed 45.8 million domestic and international visitors at the person-trip level, marking a 1.5% increase in visitor volume compared to the previous year. This growth was supported by both day-trippers and overnight visitors. Visitor spending also saw a notable rise, increasing by 3.2%, bringing total expenditures to \$21.2 billion.

Source: Tourism Economics & MMGY - D. K. Shifflett

* Person-Trips: A person-trip is any trip taken to a unique geography (national or state level). It counts the total number of people on a single trip by the number of trips but does not count the number of destinations visited on a trip.

Wan explained Maryland saw 45.8 million visitors who generated \$21.2 billion in spending in 2024. The total economic impact was \$32.3 billion (direct, indirect and induced spending) and the fiscal contributions of state and local taxes was \$2.5 billion. As a result, she said, tax revenue from visitors saves each Maryland household \$1,051. Tourism supported nearly 194,000 jobs in 2024 (direct and indirect.) Maryland tourism is maintaining its ranking as 11th in private sector employment.

MTDB Statute states:

General Fund Appropriation; Reporting Requirements.

(a) (1) In this section the following words have the meanings indicated.

(2) "Tourism tax increment" means the amount, if any, by which the tourism tax revenues collected in the fiscal year 2 years before a particular fiscal year exceeds the tourism tax revenues collected in the fiscal year 3 years before the particular fiscal year.

(3) "Tourism tax revenues" means sales and use tax revenues collected on the retail sale of tourist-oriented goods and services, as determined by the Comptroller under subsection (c)(3) of this section.

Wan shared the MTDB statute regarding the definition of the tourism tax revenues collected with regard to the numbers that we are required to report (seen on the following slide.)

FY25 Sales and Use Tax Revenue

SALES TAX CODE & CATEGORY (Millions)	FY2025 Total 12 months	FY2024 Total 12 months	YOY Total % Change	Factor	Adjusted FY2025	Adjusted FY2024	YOY Adjusted Total % Change
108 Restaurants, Lunchrooms, Delicatessens - WO/BWL	\$573.9	\$565.3	1.5%	33.3%	\$191.3	\$188.4	1.5%
111 Hotels, Motels Selling Food - W/BWL	\$50.0	\$28.1	78.2%	100%	\$50.0	\$28.1	78.2%
112 Restaurants and Nite Clubs - W/BWL	\$325.5	\$332.7	-2.2%	33.3%	\$108.5	\$110.9	-2.2%
306 General Merchandise	\$1044.0	\$1010.3	3.3%	5%	\$52.2	\$50.5	3.3%
407 Automobile, Bus and Truck Rentals	\$97.2	\$99.6	-2.4%	90%	\$87.5	\$89.6	-2.4%
706 Airlines - Commercial	\$0.9	\$1.2	-20.7%	50%	\$0.5	\$0.6	-20.7%
901 Hotels, Motels, Apartments, Cottages	\$164.6	\$156.0	5.5%	100%	\$164.6	\$156.0	5.5%
925 Recreation and Amusement Places	\$11.1	\$10.9	2.0%	50%	\$5.6	\$5.5	2.0%
Tourism Tax Categories Subtotal	\$2267.2	\$2204.1	2.9%		\$660.1	\$629.6	4.8%
Lodging Subtotal (Code 111 + 901)	\$214.6	\$184.1	16.6%	100%	\$214.6	\$184.1	16.6%
Restaurant Subtotal (Code 108 + 112)	\$899.3	\$898.1	0.1%	33.3%	\$299.8	\$299.4	0.1%

*Comptroller designated tourism taxes.

Adjusted: As required by Senate bill 458 Chapter 181 of the 2008 session of the general assembly, the Comptroller's Office uses the total of adjusted tax codes to report the qualifying tourism tax increment for each fiscal year. This analysis relies on the sales tax industry codes reflecting revenue generated from tourism and tourism-related activities, as determined jointly by the Comptroller's Office and the Department of Business and Economic Development.

FY24 = July 2023 to June 2024 (12 Months);

FY25 = July 2024 to June 2025 (12 Months)

FY25 Tourism Summary – Maryland

In Fiscal Year 2025, tourism in Maryland generated **nearly \$2.3 billion in Sales and Use Tax (SUT)** revenue specifically attributed to tourism activity, marking a **3% increase** over FY24.

- **Lodging Sector:** Despite localized declines in some areas, the overall sector saw strong growth with revenue rising **16.6%**, from **\$184 million** in FY24 to nearly **\$215 million** in FY25.
- **Restaurant Sector:** Tax revenue remained **steady**, showing **no significant change** compared to FY24.
- **Total Adjusted SUT Revenue** (as defined by the **Tourism Promotion Act of 2008**) reached **\$660 million**, reflecting a **4.8% year-over-year increase** from FY24.

In FY25, tourism generated nearly \$2.3 billion in Sales and Use Tax (SUT) revenue specifically attributed to tourism activity. In FY25, Total Adjusted SUT Revenue, as defined by the Tourism Promotion Act of 2008,

reached \$660 million, reflecting a 4.8% year-over-year increase from FY24 and indicating the board may be eligible for additional funding in FY27.

Finally, Wan noted there is a question to the Comptroller's office to see if they can identify the reason for the significant increase (78.2%) in the category of Hotel, Motels, Selling Food (111).

Development - Strategic Partnerships

Appointed Commissions

- MD Two Fifty Commission
- Fort to 400 Commission
- Maryland Bicycle and Pedestrian Advisory Committee

Industry Partners

- Outdoor Recreation Summit
- Arts Council A&E Districts Committee

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Cindy Miller, representing the Department of Commerce, reported she serves on several state commissions, specifically the MD250, Fort to 400, and the MD Bicycle and Pedestrian Advisory Committees. She indicated the MD250 Commission is gathering information on community activities and commemorations planned for 2026. A comprehensive update will be presented at the MTTS meeting on November 17th.

The MD250 Commission is scheduled to sunset in 2027 and will transition into the Fort to 400 Commission, which is focused on planning for Maryland's 400th anniversary in 2034. The Office of Tourism Development (OTD) is currently staffing the Fort to 400 Commission, with Miller serving as the current staff member until a contractor is hired.

In October, Miller and OTD Team Members are scheduled to give presentations at both the Outdoor Recreation Summit and the Arts Council A&E Districts Committee. The presentations will cover strategies for locations to "attract more visitors" by collaborating with the Office of Tourism.

Development - Meetings & Conventions

Baltimore Convention and Tourism Redevelopment and Operating Authority Task Force

- Legislation passed last session
- Subcommittees are meeting
- Full TF will meet - date TBD
- TF Report delivered in Dec



photo credit: Visit Baltimore

Ross shared an update on the Baltimore Convention and Tourism Redevelopment and Operating Authority Task Force. The Department of Commerce staffs the task force and OTD funded the second phase of the research with a partnership grant to Visit Baltimore. A report is to be delivered in December.

Advertising Campaigns



Spring/Summer Campaign
Run: March through September 2025
Markets: Baltimore, DC/NoVa, Philly, Harrisburg, Cleveland, New York Metro area
Projected Marketing Attributed Revenue:
\$126,327,821.81 (SS24: \$85.3M)
Budget: \$2,433,255 (SS24: \$2.1M)
Projected ROI: \$52:1 (SS24: \$40:1)

Fall Campaign
Run: September through early November
Markets: Baltimore, DC, Philly, Harrisburg, New York
Travel platforms: Expedia Group, [Booking.com](https://www.booking.com), Vrbo, Basis Programmatic, social
Budget: \$350,000

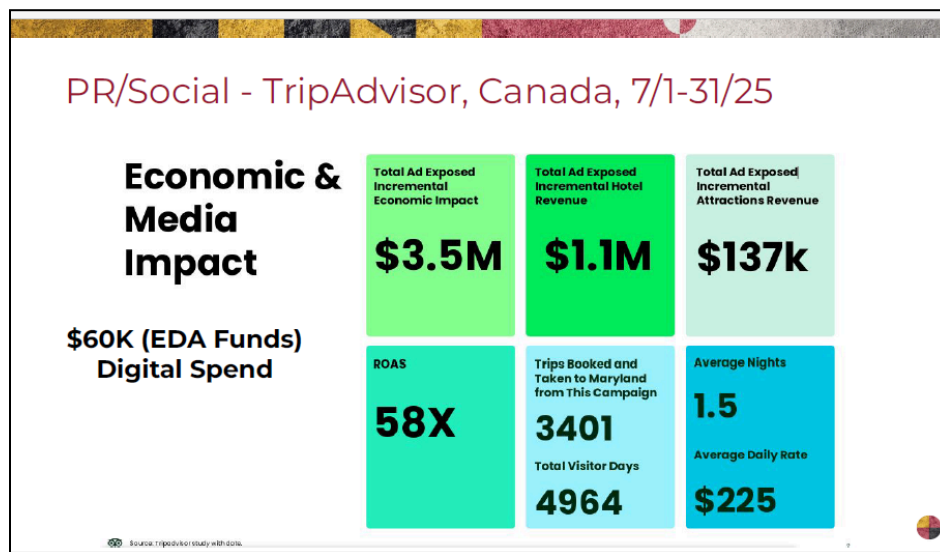
Brian Lawrence recapped the current marketing endeavors including the recent spring/summer advertising campaign (the largest and most extensive of seasonal campaigns.) He explained the ROI, attributed to the advertising spend, showed a record breaking \$52:1. Mr. Matthias asked about the types of advertising tactics which Brian explained they were traditional, digital, out of home, streaming and broadcast. Matthias expressed that the ROI is impressive and Ross echoed the same and remarked that these expenditures by consumers are quick to turn - with the idea that the return on investments are in the marketplace almost immediately or within weeks during the advertising campaign.

Scenic Byways Campaign



- Began in late July with digital advertising, broadcast TV, print advertising, out-of-home, CBS custom content, and social media.
- Out-of-home placements included station dominations at DC's Union Station, Philly's 30th Street Station, and Baltimore's Penn Station, along with digital billboards in DC, Navy Yard, Baltimore, downtown Philly, and New York City.
- Activations also featured live performances and a curated Spotify playlist of Maryland musicians.
- Print, custom content, and social media elements will continue through September.
- The campaign budget was \$2.2 million, funded by a federal EDA grant.

Lawrence gave updates on Scenic Byways Advertising Campaign, the other major campaign currently running. Funded by a federal EDA grant, the \$2.2 million campaign runs across many platforms with tightly focused messaging and will continue to the end of the month.



Lawrence continued to say additional EDA Funds were used to keep Maryland in the Canadian Market through digital media. Placed through Reach Global (our agency of record in Canada for the last eight years), results of the mainly social media campaign were presented on the slide.

Industry and Consumer Publications



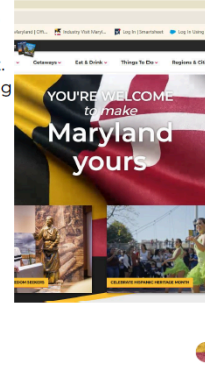
The FY26 **marketing plan** and the FY25 **annual report** are in production, with projected publish dates in early November.

The 2026 edition of **Destination Maryland** magazine is on schedule and will print in December for release in early January.

Lawrence shared the timeline for industry and consumer publications currently in production.

Website & Data Upgrades

- **AI Trip Planner:** Create, design, and host an AI-powered tool to generate custom trip itineraries.
 - Uses key data sources, regional user data, and visitor input.
 - Tailor suggestions based on individual interests, supporting 1,000 engagements per month.
 - Provides seasonal and regional destination recommendations to encourage longer and more immersive stays.
- **Database Replacement:** Redesign & and rebuild current database
 - Enhances stakeholder engagement
 - Increases the value of existing and newly captured data
 - Serve as a new data source for the AI Trip Planner.



Concluding the Advertising Content portion of the Portfolio Update, Lawrence shared that funding from FY25 initiated work related to the website and database of business listing enhancement that are woven in content and listings. This work will help power our new AI Trip Planner, which will more deeply engage with potential visitors.

Travel Trade Sales

Student Youth Travel Association

- 120+ Student Tour Operators – in attendance
- 30 one-on-one appointments developing Maryland tours
- 21 Guests and 18 Industry Partners for special client dinner



Travel Trade Sales

Upcoming Sales Events

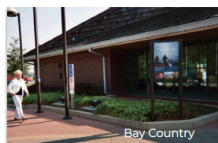
- **Maryland Motorcoach Association Marketplace**
 - Trade Show - Sept. 29-30, 2025 - Gettysburg, PA
- **National Tour Association Travel Exchange**
 - Appointments - Nov. 9-12, 2025 - Ottawa, ON
- **American Bus Association Marketplace**
 - Appointments & Trade Show - Jan. 9-13, 2026 - Reno, NV

Rich Gilbert recently conducted meetings and partner events at the Student Your Travel Association, continuing to bring Maryland to clients who bring their customers to the state. Gilbert said as always Maryland is a popular destination or stopover site for student groups who are traveling in the region.

Further, Gilbert overviewed upcoming travel trade events where he and tourism industry representatives will be conducting sales activities. with group tour clients.

Consumer Sales - Maryland Welcome Centers

- ♦ **Temporarily Closed:** Youghiogheny Overlook Welcome Center @Friendsville
- ♦ **Seven Days/Week:** Mason Dixon Welcome Center @Emmitsburg
- ♦ **Six Days/Week:** Bay Country Welcome Center @Centreville
- ♦ **Five Days/Week:**
 - I-95 South and I-95 North Welcome Centers @Savage
 - South Mountain Welcome Centers: I-70 Eastbound and Westbound @Myersville
 - Sideling Hill Welcome Center @Hancock



Ross provided an update on the Maryland Welcome Centers. Due to recent retirements and a hiring freeze, the Youghiogheny Overlook Welcome Center is temporarily closed, and digital kiosk options are being explored for the site. She reminded the goal is to keep all centers open five days a week (Thursday-Monday, unless Monday is a holiday). Mason Dixon remains open seven days, and Bay Country will reduce to five days after an upcoming retirement. Finally, she noted that all SHA Rest Areas are open 24/7.

Marketing & Sales - Meetings & Conventions

Kelly Groff, Visit Montgomery - Meet in Maryland Partnership 2.0

Promoting Maryland as a top destination for meetings, conferences and conventions.

Partnership - Visit Annapolis & Anne Arundel County, Visit Baltimore, Visit Howard County, Visit Montgomery, Ocean City MD, and Experience Prince George's.

- Brand Launch - 2024
- Advertising in major meetings publications/digital outlets 2025
- Sales-Trade Shows through 2025
- Targeting Quantum Technology, Computational Biology and Position, Navigation & Timing industry events

Meet in Maryland™

The Heart of the Mid-Atlantic™



Presenting highlights of the Meet in Maryland Partnership (MIMP) program, Kelly Groff from Visit Montgomery provided the board with an update. The program, which aims to encourage meeting planners and decision-makers to choose Maryland for their events, is now in its 2.0 iteration, funded by OTD. MIMP 1.0 and 1.5 were funded through EDA grants. The ultimate goal of the program is to increase multi-night stays in Maryland by visitors from this key audience.

Marketing & Sales - International

Kristen Pironis - Visit Annapolis & Anne Arundel County - Maryland International Marketing Partnership

- Responds to the sunset of Capitol Region USA
- Collaboration with Visit Annapolis & Anne Arundel County, Visit Baltimore and Visit Frederick
- Builds a research-based Maryland international brand and marketing plan
- Provides opportunities for additional partner engagement
- Optimizes in-market and in-destination activations



Kristen Peronis with Visit Annapolis & Anne Arundel County, shared key updates on the newly established Maryland International Marketing Partnership. This partnership was formed following the dissolution of Capital Region USA, a non-profit that had promoted Maryland, Virginia, and Washington, DC for more than three decades. This new organization is in its early stages and plans to use the Meet in Maryland initiative as a model. Over the next 18 months, its focus will be on developing governance, conducting research for a brand and marketing plan, in addition to improving in-market and in-destination promotional activities.

Ross stressed the significance of creating partnerships to continue to move forward and stay in the international marketplace. She also thanked all partners and amplified the significance of creating more ways to entice multnight visitors to Maryland.

Other Business

MTDB Board Meeting - Monday, November 17, 2025
Location The Hotel at College Park - 777 Baltimore Ave, College Park 20740
Note Start Time 9:00AM

Maryland Travel & Tourism Summit (MTTS)
11:30AM - 12:30PM - Opening Lunch
12:30PM - 2:00PM - General Session: State of the State of Tourism

RSVP

Important - Expect an Email to Register to Attend

- ☐ Board Meeting
- ☐ Opening Lunch
- ☐ State of the State

Note re: reimbursement according to state per diem
-accommodations if Summit is 50 miles from home

V. Other Business

Hansen Terhune stated the next board meeting begins at 9:00 a.m on November 17th, the same day as the Maryland Travel & Tourism Summit (MTTS). In addition, OTD is putting together MTTS' first general session - as the State of the State of Tourism - and all are invited to register and attend this function. More information is planned to be shared in the next few weeks and early RSVPs were encouraged.

VI. Board Member Updates

Cassandra Vanhooser shared greetings from Senator Johnny Mautz who had last minute business that prevented him from attending today. He hopes to attend the next meeting of the board.

VII. Reports from the Industry

Janna Howley, Executive Director of Maryland Wineries Association shared updates and encouraged all to view marylandwine.com to see the wineries in their counties. Ms. Howley also serves on the Agricultural Commission and invited Ms. Ross to attend a future meeting to share tourism insights and opportunities.

VIII. Adjournment

Spence requested a motion to adjourn the meeting. Mathias made the motion and asked it be in honor of Dr. Leonard Burger, a long-time industry executive and former board change; the motion to adjourn was seconded by Vanhooser and all were in agreement. The meeting adjourned at 12:00 p.m.