

**Visit**  
**Howard County**  
*Maryland*

***FY2018–FY2020***  
***Draft Strategic Tourism Plan***  
***Rationale***

# Report Outline

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**1.**

# Introduction

## Background

The Howard County Tourism Council Inc. (HCTC), doing business as Visit Howard County Maryland, was established in 1981 as a 501(c)6 not-for-profit group to develop and promote tourism for Howard County, its communities and the visitor industry. It has a 17 member Board of Directors providing leadership and financial oversight. The HCTC is funded primarily by the Howard County government through a transient hotel tax along with monies received from tourism partner fees and cooperative marketing program investments. The current HCTC budget is \$1.4 million with an eight professional staff complement. It is recognized by the Howard County government and the Maryland Office of Tourism Development as the official destination marketing organization (DMO) for the county.

With a new HCTC Executive Director employed in 2016 and the need to update an existing strategic plan and set new priority initiatives, it was requested that an independent third party advisory firm be retained to assist in the process. Accordingly, a newly researched and facilitated strategic plan was prepared over the second half of 2016.

## Four Assessment and Planning Goals

Four strategic planning process goals were set for completion.

**HCTC Board Members and Staff,  
and Community/Visitor Industry  
Leaders Tourism Planning Dialogue**

**DestinationNEXT Tourism Futures  
Research Survey Results  
and HCTC Implications**

**+**

**HCTC Strategic Tourism Challenges,  
Opportunities and New Priority  
Initiatives Analysis and Conclusions**

**Formalized HCTC Strategic  
Tourism Plan Documentation**



## Plan Methodology

With the previously agreed-to strategic planning process goals, a detailed information and analytical program of work was undertaken over a six month period with three expected Howard County tourism planning outcomes.

### The Program of Work (August 2016–January 2017)

- ⇒ Review and analysis of past Howard County tourism marketing secondary documentation including strategic plan and associated survey, key annual marketing plan activities and other related planning materials
- ⇒ Initiation and analysis of a Howard County specific DestinationNEXT survey with attendant results on destination development and DMO community relations
- ⇒ Conducting of two HCTC Board of Directors strategic planning sessions on November 1, 2016 and January 24, 2017
- ⇒ Ongoing meetings and telephone calls with HCTC Executive Director and staff, and community/visitor industry leaders on strategic destination challenges and new opportunity initiatives over November and December 2016
- ⇒ Documentation of meeting and survey results and final strategic plan contents

## Expected Plan Outcomes



**2.**

# Howard County Current Tourism Situation

## Recent Accomplishments

From the HCTC staff discussions, four noted accomplishments of the Howard County tourism marketing effort over the past five years were recorded as follows:

- ⊃ Increasingly supportive Howard County government on tourism promotional investment
- ⊃ Higher public relations/publicity recognition in key visitor origin markets
- ⊃ Stronger visitor industry partnership support
- ⊃ Initial strategic destination planning effort with recent focus on priority tourism initiatives.

## Key Issues

From the HCTC Board strategic planning session and supplemental pre-session DestinationNEXT open-ended question survey results, 12 tourism issues, either expressed as an opportunity or a constraint, were identified, not in priority order, as shown:

- ⊃ Strong compelling destination/community brand presence and aligned identity usage
- ⊃ New and/or expanded meeting and sports facility development
- ⊃ Effective public transportation system
- ⊃ Greater arrival and directional signage recognition (gateways and wayfinding)
- ⊃ New and/or enhanced nature/ecotourism, agri/food tourism and event (conference/sport/festival) tourism opportunities analysis and subsequent strategies
- ⊃ International tourism potential and market development
- ⊃ Strengthened digital and social media marketing programming and related technology investment
- ⊃ Community downtown redevelopment
- ⊃ Enhanced delivery of on-site visitor services
- ⊃ Increased visitor industry and county government cooperation and partnerships
- ⊃ Focused tourism advocacy and stakeholder relationship building
- ⊃ Increased DMO funding development.

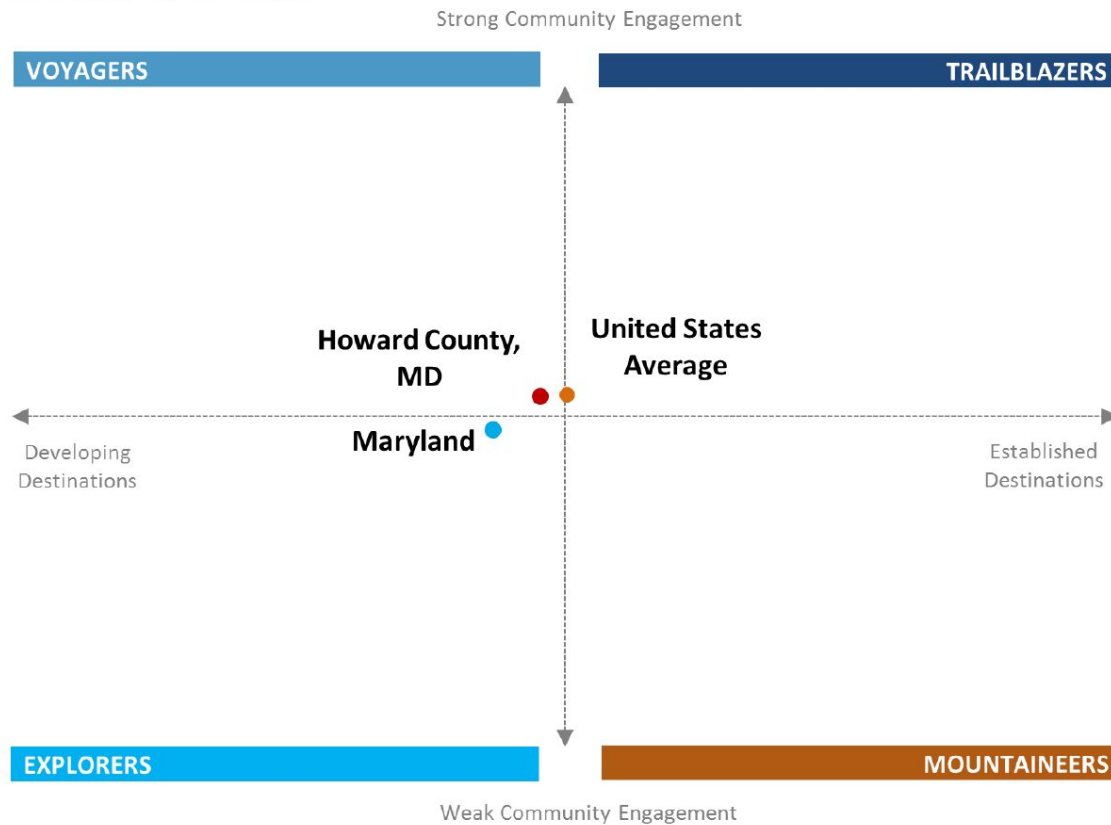
However, the focus of attention and concern was primarily directed to the first five issues and the last three.





# DestinationNEXT Survey Results

## Howard County, MD Overall Assessment – United States



A Destination Marketing Association International (DMAI) DestinationNEXT survey was administered and subsequently analyzed based on 43 responses received from the HCTC Board of Directors and staff and other Howard County tourism industry proponents. This assessment tool which focuses on the rating of destination strengths and community engagement determined that Howard County tourism is in the Voyagers stage. This indicates the need to agree on the implementation of both destination and DMO visions and delivering on brand promises to Howard County community/industry partners and visitors. Simply, Howard County is recognized as a developing tourism destination with strong community engagement to proceed. In comparison to other reporting DestinationNEXT DMOs in the United States and Maryland, Howard County is relatively close to the nationwide average of being an established tourism destination and the HCTC is above average in being more community tourism engaged.

## Destination Strength: Report Card – Stakeholder Group

| Perceived Performance<br>(1-5 scale)         |                                 |                   |                       |                                      |
|--|---------------------------------|-------------------|-----------------------|--------------------------------------|
| Variable                                     | Howard<br>County, MD<br>Average | Mangement<br>Team | Board of<br>Directors | Bureau<br>Partners &<br>Stakeholders |
| Attractions & Entertainment                  | 3.79                            | 3.90              | 3.85                  | 3.65                                 |
| Destination Performance                      | 3.46                            | 3.56              | 3.42                  | 3.44                                 |
| Events                                       | 3.62                            | 3.81              | 3.49                  | 3.59                                 |
| Brand  | 3.71                            | 3.48              | 3.83                  | 3.79                                 |
| Sports & Recreation Facilities               | 2.66                            | 2.80              | 2.73                  | 2.48                                 |
| Mobility & Access                            | 3.00                            | 3.13              | 3.00                  | 2.88                                 |
| Accommodation                                | 3.25                            | 3.08              | 3.32                  | 3.32                                 |
| Communication & Internet Infrastructure      | 3.56                            | 3.81              | 3.57                  | 3.36                                 |
| Convention & Meeting Facilities              | 2.86                            | 2.72              | 2.89                  | 2.95                                 |
| Air Access                                   | 4.02                            | 4.24              | 3.95                  | 3.91                                 |
| <b># of Participants</b>                     |                                 | 23%               | 30%                   | 47%                                  |
| <b>DESTINATION STRENGTH</b>                  |                                 |                   |                       | <b>3.40</b>                          |
| <b>INDUSTRY AVERAGE DESTINATION STRENGTH</b> |                                 |                   |                       | <b>3.49</b>                          |

**RESULTING SCENARIO**

**VOYAGERS**

## Community Support & Engagement: Report Card – Stakeholder Group

| Perceived Performance<br>(1-5 scale)                       |                                 |                   |                       |                                      |
|--|---------------------------------|-------------------|-----------------------|--------------------------------------|
| Variable   | Howard<br>County, MD<br>Average | Mangement<br>Team | Board of<br>Directors | Bureau<br>Partners &<br>Stakeholders |
| Funding Support & Certainty                                | 3.55                            | 2.94              | 4.14                  | 3.45                                 |
| Membership Strength & Support                              | 3.95                            | 4.06              | 4.00                  | 3.82                                 |
| Effective Advocacy Program                                 | 3.81                            | 3.83              | 4.00                  | 3.61                                 |
| Industry Support   | 3.95                            | 3.94              | 4.27                  | 3.64                                 |
| Economic Development                                       | 3.58                            | 3.73              | 3.55                  | 3.48                                 |
| Workforce  | 3.52                            | 3.83              | 3.27                  | 3.50                                 |
| Local Community Support                                    | 3.51                            | 3.26              | 3.65                  | 3.58                                 |
| Regional Cooperation                                       | 3.63                            | 3.50              | 3.82                  | 3.55                                 |
| Effective DMO Governance Model                             | 3.95                            | 4.22              | 4.18                  | 3.50                                 |
| Hospitality Culture  | 3.73                            | 3.89              | 3.68                  | 3.64                                 |
| <b># of Participants</b>                                   |                                 | 23%               | 30%                   | 47%                                  |
| <b>COMMUNITY SUPPORT &amp; ENGAGEMENT</b>                  |                                 |                   |                       | <b>3.72</b>                          |
| <b>INDUSTRY AVERAGE COMMUNITY SUPPORT &amp; ENGAGEMENT</b> |                                 |                   |                       | <b>3.60</b>                          |

**RESULTING SCENARIO**

**VOYAGERS**

Note: **Green** shading signifies that the destination **outperformed** the industry average by greater than 0.2.  
**Yellow** shading signifies that the destination **underperformed** the industry average by greater than 0.2 but less than 0.4.

**Red** shading signifies that the destination **underperformed** the industry average by greater than 0.4. From the Destination Strength graphic, Howard County tourism achieved a 3.40 performance rating compared to the industry/nationwide average of 3.49. Areas of strength related to air access, attractions and entertainment and events. Deficiencies focused on sports/recreation facilities and convention/meeting facilities. Some differences were identified among Board of Directors, Management Team and Partners/Stakeholders.

From the Community Support & Engagement graphic, Howard County tourism achieved a 3.72 performance rating compared to the industry/nationwide average of 3.60. Areas of support related to DMO governance model and industry member/partner engagement. Deficiencies focused on community support, workforce development and DMO funding. Key differences were also noted among Board of Directors, Management Team and Partners/Stakeholders.

## Main Challenges

From the initial HCTC Board discussion and DestinationNEXT survey results, the following priority-based opportunity challenges to effective Howard County tourism marketing and management now and in the near future were determined.

### Destination/DMO Challenges

- 1** To know and apply a compelling destination/community brand presence with aligned identity platform
- 2** To determine current and growing tourism markets for appropriate targeted destination marketing programming
- 3** To understand the DMO role and strategy in supporting meeting, event, sports facility and public transportation development and related services
- 4** To proactively undertake tourism advocacy and partner relationship building
- 5** To investigate and prepare an increased DMO funding business case proposal

**3.**

# Howard County Tourism Council Purpose and Directions

## Mission, Values and Guiding Principles

The current HCTC mission statement was modified along with newly associated organization values and key tourism programming guiding principles as determined at the initial Board strategic planning session.

*The Howard County Tourism Council serves as the lead organization to market and develop the county as a premier leisure and business travel destination.*

### Values

- ↳ Collaborative
- ↳ Transparent
- ↳ Accountable
- ↳ Passionate

### Guiding Principles

- ↳ Strengthen destination awareness and conversion
- ↳ Increase overnight and day visitors
- ↳ Increase visitor frequency year-round/off-peak periods
- ↳ Extend length of visitor stays

The agreed-to HCTC values are the operating norms of the Board and staff to be practiced while the guiding principles are to be used in selecting and investing in tourism programming that delivers the indicated outcomes.

# Partner and Visitor Commitments

In addition, HCTC promises were composed to clearly enunciate its value proposition to the tourism industry, communities and visitors.

**Partner Promise**

We commit to collaborating with the Howard County tourism industry and communities and facilitating opportunities in new visitor demand, promotion, product development, education and advocacy.

**Visitor Promise**

We commit to providing quality information and advice on Howard County’s brand experiences.

# Vision Statements

Similarly, two 2025 vision statements were prepared for Howard County tourism and the HCTC to achieve over the next decade.

**Destination Vision**

*Howard County, adjacent to the Baltimore and Washington, DC metropolitan areas, with key modern and historic communities is our state’s quintessential edge-city getaway showcasing unique experiences in outdoor adventure travel, sports events, cultural heritage and agritourism attractions and events, and leisure shopping and food specialties.*

**DMO Vision**

*We are an energetic and innovative organization of talented and dedicated professionals who fulfill our mission by integrating the organization’s work with our partners and serving as a credible advocate for Howard County’s tourism industry.*

## Strategic Goals

Associated with the mission statement, four long-term HCTC goals were prepared as shown.

***Destination Marketing and Sales: Increase Brand Awareness and Conversion***

*To increase the awareness and demand of the Howard County tourism experience by target market through executable marketing, sales and services strategies.*

***Destination Development: Enhance Brand Experience***

*To facilitate a strengthened Howard County tourism experience by supporting new and/or improved attractions, facilities, amenities and related infrastructure.*

***DMO Advocacy and Stakeholder Relations: Raise Tourism Recognition***

*To raise the profile and value of Howard County tourism and the roles and effective programming of the HCTC.*

***DMO Resources and Management: Ensure Effective Performance***

*To operate as a fiscally responsible and accountable entity with relevant research and planning, and productive partnerships leading to optimal performance results.*

4.

# Howard County Tourism Strategic Outlook

## Three Year Priority Initiatives

With four strategic goals in place, 16 priority-based program initiatives were identified to be implemented over the next three years as follows.

| Goal/Initiative   | FY2018 | FY2019 | FY2020 |
|---|--------|--------|--------|
| <b>Destination Marketing and Sales: Increase Brand Awareness and Conversion</b>                 |        |        |        |
| A formalized targeted, partner-vested and measurable destination marketing/sales plan execution | ●      | ●      | ●      |
| Impactful destination brand strategy with identity, messaging and partner usage platform        | ●      | ●      |        |
| Supportive multi-year pre- and post-marketing research program                                  |        | ●      | ●      |
| New special interest/niche tourism market partnerships, e.g., adventure travel, agritourism     | ●      | ●      | ●      |
| <b>Destination Development: Enhance Brand Experience</b>  |        |        |        |
| Tourism product development strategy formulation  | ●      |        |        |
| Sports facility assessment and recommended directions   | ●      |        |        |
| Conference center and hotel development board support position                                  | ●      |        |        |
| Countywide visitor services and upsell strategy formulation                                     | ●      |        |        |
| Branded visitor service training program development and delivery                               |        |        | ●      |
| <b>DMO Advocacy and Stakeholder Relations: Raise Tourism Recognition</b>                        |        |        |        |
| A targeted audience community relations plan development and execution                          | ●      | ●      | ●      |
| Tourism importance and value messaging collateral   | ●      |        |        |
| Ongoing community and visitor industry proponent communications and issue advocacy              | ●      | ●      | ●      |
| <b>DMO Resources and Management: Ensure Effective Performance</b>                               |        |        |        |
| DMO funding business case analysis and strategy development                                     |        | ●      | ●      |
| Strategic plan priorities determination and associated budget allocations                       | ●      | ●      | ●      |
| Engaged board committee/task force set up investigation   | ●      |        |        |
| DMAP accreditation achievement  |        | ●      |        |



## Strategic Performance Outcomes

Four broadly-based destination marketing and management measurement metrics were determined as follows to record effective Howard County tourism returns.

### HCTC Strategic Plan Metrics

- ⇒ **Strengthening the Howard County tourism brand presence**  
(overall number of county visitors and spending; destination website analytics; social media engagement evaluation)
- ⇒ **More integrated county/community and segmented marketing and promotion with industry partners**  
(number of visitor inquiries/leads and conversion rate; higher attraction/event attendance; leveraged key partner tourism marketing investment)
- ⇒ **Higher state/community, industry and media relations engagement**  
(new and/or expanded state/county, resident and private sector tourism support; earned media value)
- ⇒ **Increased tourism funding support**  
(destination visitor profile and economic impact survey statistics; tourism industry sector specific ROI indicators)

5.

# **Appendices**

## **Howard County Tourism Council Board of Directors and Management Team**

**Board of Directors**

## **Officers/Executive Committee**

David Balderson, President, The Wayside Inn  
Bed & Breakfast

Chuck Chandler, Vice President, Hampton Inn  
and Suites Columbia/South & SpringHill Suites  
Columbia

Mike Libber, Partnership Chair, Elite  
Tournaments

Pete Mangione, Treasurer, Finance Chair, Turf  
Valley

Becky Mangus, Marketing Chair, The Business  
Monthly

Martha Clark, Nomination Chair, Clark's Elioak  
Farm

## **Board Members**

Matt Baker, Terrapin Adventures

Valerie Barnard, Columbia Association

Kevin Kelehan, Carney, Kelehan, Bresler,  
Bennett and Scherr

Ellen Kilby, Eyre Bus Tour & Travel

Julia Mattis, ReMax Advantage Realty

Barbara Nicklas, The Mall in Columbia

Tori Buscher, Victoria Gastro Pub

Jay Winer, Historic Savage Mill & A. J.  
Properties

Brock Yetso, Ulman Cancer Fund for Young  
Adults

## **Management Team**

Anthony Cordo  
*Executive Director*

Amanda Hof  
*Director of Community Development*

Sarah Kurtanich  
*Director of Marketing*

Bridget Graham  
*Director of Operations & Visitor Services*

Sally Slater

## **Ex-Officio Board Members**

Jean Parker, Merriweather Post Pavilion

The Honorable Gail Bates, Maryland Senate

Mary Catherine Cochran, Patapsco Heritage  
Greenway

The Honorable Guy Guzzone, Maryland Senate

Al Harden, Howard County Dept. of Recreation  
& Parks

Terry Hasseltine, Maryland Sports/Maryland  
Stadium Authority

Karen Besson, Ellicott City Partnership

Donna Richardson, Howard County  
Government

Diane Wilson, Howard County Government,  
Chief of Staff, Howard County Executive Allan  
Kittleman

Kathy Johnson, Howard County Economic  
Development Authority

*Director of Sales*

Karmen Osei  
*Creative Marketing Specialist*

Danielle Campana  
*Development & Marketing Coordinator*

Crystal Abrom  
*Sales Coordinator*

## **Planning Documentation Reviewed**

Howard County Chamber of Commerce 2017 Issues for Legislative Action (2016).

Howard County Chamber of Commerce Strategic Plan and Vision 2020 (2015).

Howard County Economic Development Authority Strategic Plan Draft (2016).

Howard County Tourism & Promotion Strategic Plan (2013).

Howard County Tourism & Promotion Strategic Plan Update Survey Results (2015).

Howard County Tourism Council DestinationNEXT Multi-user Online Diagnostic Tool Results (2016).

Various Howard County Tourism Collateral Materials (2015–2016).