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Executive Director's Message

Dear Tourism Partner:

n behalf of the staff of the Maryland Office of Tourism Development, I am proud to share with you some of last year's accomplishments as well as highlight our FY 2011 goals.

This Tourism Marketing & Development Plan was designed in alignment with the four goals of the Department of Business and Economic Development (DBED). These goals guided the tourism staff in the development of action plan items that are integral components of our annual work plan. Detailed below are the Office of Tourism Development (OTD) Goals, and an update on the FY 2010 Action Plan Key Deliverables as well as the new FY 2011 deliverables:

GOAL 1: SUSTAIN AND IMPROVE JOBS IN THE TOURISM INDUSTRY

FY 2010 Key Deliverable:

» Finalize FY 2011-2015 Maryland Tourism Development Board (MTDB) Five Year Strategic Plan-Complete

FY 2011 Key Deliverables:

- » Continue leadership in planning and hosting the Maryland Travel & Tourism Summit, the foremost educational program available to all members of our industry.
- » Research and report workforce development best practices.

GOAL 2: SUSTAIN AND INCREASE ECONOMIC IMPACT FROM TOURISM

FY 2010 Key Deliverables:

- » Monitor tourism sales tax codes—On Target—also review with DMOs quarterly.
- Complete "Welcome Center Efficiency and Effectiveness Study"-Deferred due to program budget reductions.
- » Open the enhanced I-70 Welcome Centers—Opened 9/24/10—current days and hours of operation: Fridays-Sundays, 8:30 a.m.-4:30 p.m.

» Advance plans for 12 signature War of 1812 Bicentennial events-On Target-Multiple major events confirmed, including June 2012 week-long National Bicentennial Kickoff/Naval Review.

FY 2011 Key Deliverables:

- » Administer the Welcome Center Assistance Program.
- Refine methods for determining economic impact of Welcome Centers.
- » Provide promotional support for upcoming commemoration events.
- » Partner with Visit Baltimore and other county tourism offices on AIBTM-The Americas Meetings & Events Exhibition and America Meetings Week, June 19-24, 2011.

GOAL 3: IMPROVE AWARENESS AND ENHANCE THE POSITIVE PERCEPTION OF MARYLAND

FY 2010 Key Deliverables:

- Create new Interactive Services Unit, charged with enhancing the division's web, social media and mobile applications-On Target-Launched Phase I of interactive map.
- » Improve the completeness, timeliness and ease of transmission of event and attractions information-On Target-Master database for event listings due to go live Fall 2010.
- Craft new research-driven consumer marketing campaign -On Target-Campaign launched Spring 2010. Advertising executions are being finalized for DMO use. DMOs are incentivized to use new Maryland brand ads.
- Complete Phase II of the Maryland Byways research study-Complete.

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- » Refine county cooperative grant program to reinforce marketing priorities and metrics—Complete. Grants now based upon approved marketing expenses and tourism revenues.
- » Launch Maryland Green Travel certification program—On Target— Lodging application and certified hotels now online. Rollout program to restaurants, attractions, visitor centers, marinas and campgrounds in FY 2011.

FY 2011 Key Deliverables:

- » Launch Phase II of the VisitMaryland interactive map, adding core tourism businesses such as lodging and sporting venues. Survey users to prioritize new enhancements.
- » Complete research and design scope of work for mobile applications for the tourism website and the interactive map tool.
- » Create custom database of tourism assets as well as a new call center/ fulfillment customer management system.
- » Craft and launch a communications platform for the FY 2011–2015 commemoration period.

GOAL 4: LEVERAGE INVESTMENT IN MARYLAND'S UNIQUE QUALITY OF LIFE ASSETS

FY 2010 Key Deliverables:

» Administer projects assisted with \$6.1 million in Federal Highway Administration Scenic Byway Grants for the Civil War Sesquicentennial, Harriet Tubman Centennial and the War of 1812 Bicentennial—On Target—includes MPT War of 1812 travelogue, international byways marketing and new printed and online byways map and guide. I join Maryland Tourism Development Board Chair Greg Shockley in encouraging you to review the OTD Events Calendar, as well as the partner marketing and new cooperative advertising opportunities detailed in this plan. Working collaboratively with a unified message is one way to make all our marketing dollars go further.

Once again, I thank all of you for your continued commitment to our industry. I look forward to working together to market our "Maryland of wonder."

All the best,

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Margot A. Amelia

Executive Director , Maryland Office of Tourism Development

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Maryland Tourism Development Board Chairman's Message

MISSION STATEMENT

The Maryland Office of Tourism Development's (OTD) mission is to increase tourism expenditures (visitor spending) to the State by—

- » Promoting Maryland's attractions, accommodations and visitor services;
- » Providing residents and out-of-state visitors with information and services to ensure a positive trip experience; and
- >> Positioning Maryland as a competitive destination worldwide.

Dear Tourism Industry Partner:

Your work is work that is moving Maryland forward—and, as Chair of the Maryland Tourism Development Board, I want to thank you for the hard work you do every day to show off and promote all that is great about our State. You are a big part of the reason that we're recovering faster and rebounding stronger than other States.

Why do I say that? Together, we've created 17,000 net leisure and hospitality jobs in Maryland between August 2009 and August 2010. Looking just at 2010—January through August—the number of tourism jobs in Maryland grew by 3.3 percent while the national leisure and tourism sector declined more than 6 percent.

Demand for Maryland lodging, a key indicator for our industry, is also outpacing national trends. Rooms sold increased 8.9 percent in the first eight months of 2010, ahead of the 7.4 percent growth in room demand across the nation, according to Smith Travel Research, a prominent research group used by the hotel industry.

And, in 2009, Maryland was one of only six states that saw an increase in visitation, welcoming more than 29 million. That represents one million additional visitors than in 2008. I am sure many of you sold them attraction tickets, hotel nights, sightseeing tours, souvenirs and—in my case—hopefully a great meal or liquid refreshment!

I am proud of this board's continuing work with the Office of Tourism, and am pleased to present the Fiscal Year 2011 Tourism Marketing and Development Plan. The objectives and strategies of this plan are designed to enhance tourism's positive economic impact.

To comply with the accountability-related goals of Governor O'Malley's administration, the Office of Tourism Development aligns this marketing plan to performance-based success measurements. Such standards provide both our board and the Office of Tourism Development with the tools to better quantify marketing successes, while providing a road map for attaining higher returns on future marketing efforts. Once again, even with lower dollars to market, OTD outperformed the prior year in visitors to the tourism website (up 19 percent to 1.77 million). Public relations efforts generated more than \$12 million in advertising value for Maryland tourism products and services, more than double the previous year.

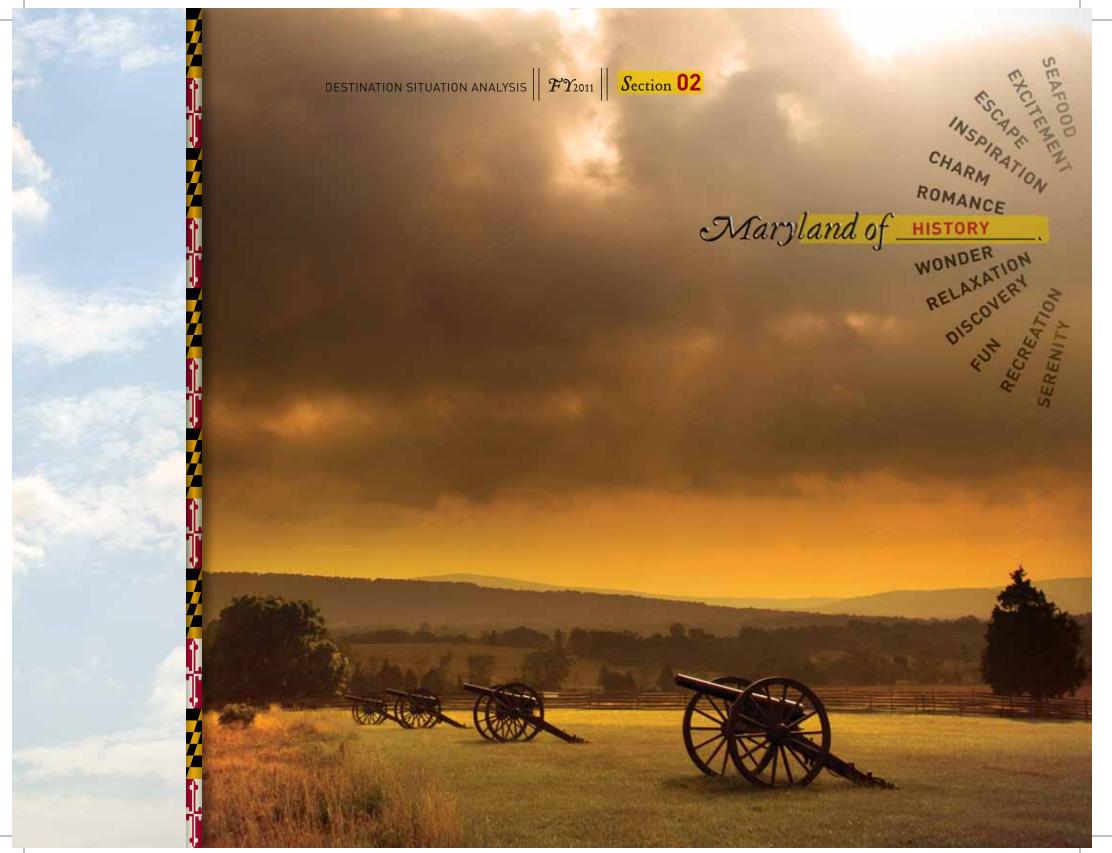
It is the power of partnerships that help drive the industry forward. Please take the time to review the Partner Marketing and Advertising Opportunities at the back of the plan. These programs are available to all tourism businesses in the State that can benefit from reduced marketing costs and great consumer exposure.

I know I speak for the board when I say we look forward to working with you, our tourism industry partners, to increase tourism expenditures, tax revenues and employment.

Sincerely,

Greg Shockley, Chairman

Greg Shockley, Chairman
Maryland Tourism Development Board
Owner, Shenanigan's Irish Pub, Ocean City



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TRAVEL INDUSTRY TRENDS

The worst recession since the 1930s ended more than a year ago (June 2009), according to the National Bureau of Economic Research, but many consumers aren't behaving like this is true. Frugality is seemingly being embraced by consumers at all income levels.

Despite ongoing economic challenges, travel continues its comeback. According to the Bureau of Economic Analysis (BEA), spending on travel and tourism grew 3 percent during the second quarter of 2010, exceeding rather significantly the 1.7 percent growth in the overall economy. However, travel and tourism spending remains far below its pre-recession peak.

A May 2010 American Express survey of 2,000 U.S. adults found more than half (51 percent) planning a summer vacation. While family trips were reported by 52 percent, a variety of other vacation types were being planned, including couples trips (26 percent); trips with friends such as "girlfriend getaways" and "mancations" (10 percent); "staycations"—intending to enjoy time off and attractions near home (11 percent); experiential or adventure vacations such as a culinary retreat or hiking trip (7 percent); and educational vacations (4 percent).

Similarly, a May 2010 Harris Poll found that 66 percent of Americans planned to take a summer vacation in 2010, similar to the 65 percent who expected to do so in 2009. Additionally, 19 percent planned to take at least one business trip during summer 2010, a slight reduction from 23 percent in 2009.

Fewer respondents were planning to cut back on the number of trips, length of the trip and expenditures. Still, many travelers reported that current economic conditions continued to alter how they travel, and many are still looking to economize in their travel spending.

Travelers are opting for less expensive activities—museums, county fairs and national parks have all reported increased attendance. There have also been

reports of increases in camping and less expensive recreational activities—and visits to State and local parks have been up significantly nationwide.

U.S. travelers continue to look for deals, and YPartnership *travelhorizons* research has suggested that incentives and discounts have to be deep in order to influence decisions about destinations and travel service suppliers. Fifty-dollar gas and gift cards seem to be popular among all generations and income groups, but \$25 is not enough. Complimentary breakfast, upgrades and 2-for-1 dining specials are also generally well-received by potential travelers. Maryland travel destinations and suppliers will need to offer similar incentives to maintain market share.

Nationwide economic rebounds are expected in 2010. The U.S. Travel Association projects a 3 percent growth in person-trips in 2010 and the first simultaneous growth in both leisure and business travel sectors in the last 5 years. Travel price indexes are also projected to recover after falling 6 percent in 2009, more than twenty times the rate of decline for overall consumer prices.

Additionally, the U.S. Travel Promotion Act was passed in early 2010 to promote the United States as a premier international destination. According to the U.S. Travel Association, worrisome evidence suggests that the U.S. is losing ground to other countries in the global travel market. Failure to keep pace with the growth in international long-haul travel since 2000 has cost the U.S. economy an estimated \$509 billion in total spending and \$32 billion direct tax receipts.



Maryland was one of only six states that saw an increase in tourism in 2009.

-Baltimore Sun Editorial, 5/18/10

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espite most U.S. destinations reporting flat or declining domestic leisure visitation in 2009, Maryland recorded almost one million more travelers to the State than in 2008. Maryland's market share has increased more than 15 percent since 2007.

For calendar year 2009, D.K. Shifflet & Associates reports that Maryland hosted an estimated 29 million domestic visitors, up 3.5 percent from 2008 compared to a 5 percent decline in domestic person-trips in the United States.

Seventy-six (76) percent, or 22.07 million, were leisure visitors, and the remaining 24 percent, or 7 million, were business travelers. More than 50 percent of trips (nearly 15 million) were day—trips, while 49 percent (more than 14 million) were overnight.

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VISITOR VOLUME ESTIMATES (PERSON TRIPS IN MILLIONS)

	5	Marylan	d	United States			
	2009	2008	2007	2009	2008	2007	
TOTAL	29.06	28.08	27.20	1,841.24	1,947.82	1,999.2	
BUSINESS	7.00	7.10	6.61	422.17	479.81	502.88	
LEISURE	22.07	20.98	20.59	1,419.07	1,468.01	1,496.32	
OVERNIGHT	14.15	13.86	13.61	925.90	973.64	989.46	
DAY-TRIP	14.92	14.22	13.59	915.34	974.18	1,009.74	

Source: D.K. Shifflet & Associates, Ltd. DIRECTIONS Travel Intelligence System

Maryland's travel data indicates that both leisure and business trips have a slight skew towards day-trips. Over the last three years, leisure travelers have been split evenly between day-trippers and overnighters, with day-trips only slightly more prevalent than overnight ones; while 54 percent of business trips are day-trips and 46 percent are overnight trips.

D.K. Shifflet defines a visitor as either someone visiting overnight or someone who travels 50 miles or more from their home.



MARYLAND DESTINATION REGIONS

	SHARE OF ALL MARYLAND VISITORS (2007-09)
CENTRAL REGION [ANNE ARUNDEL, BALTIMORE CITY, BALTIMORE, CARROLL, HARFORD, HOWARD COUNTIES]	51%
EASTERN SHORE [CAROLINE, CECIL, DORCHESTER, KENT, QUEEN ANNE'S, SOMERSET, TALBOT, WICOMICO, WORCESTER COUNTIES]	22%
CAPITAL [FREDERICK, MONTGOMERY, PRINCE GEORGE'S COUNTIES]	16%
WESTERN MARYLAND [ALLEGANY, GARRETT, WASHINGTON COUNTIES]	7%
SOUTHERN (CALVERT, CHARLES, ST. MARY'S COUNTIES)	4%

Source: D.K. Shifflet & Associates, Ltd., with independent analysis by the Maryland Office of Tourism

Trends and Comparisons

National domestic travel volume declined from 2008. Specifically, total domestic U.S. visitor volume, as measured in person-trips, fell more than 5 percent from 2008 to 2009. Leisure travel represented more than 77 percent of all person-trips, two points more than the previous year because of the decline in business trips, with overnight and day-trips evenly split at 50 percent each.

Maryland outperformed both the national and regional trends, with the largest percent growth in Maryland's leisure segment, resulting in net gains in both day and overnight visits in the State.

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Maryland's surrounding States saw declines from 2008. Delaware saw dramatic declines in leisure and overnight visits, while business and day-trip sectors were hit harder in Pennsylvania, Virginia and West Virginia.

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PERCENT CHANGE IN PERSON-TRIP VOLUME 2008–2009

	U.S.	MD	DE	PA	VA	WV
TOTAL	(5.5%)	3.5%	(5.3%)	(3.9%)	(2.1%)	(1.4%)
BUSINESS	(12%)	(1.5%)	12%	(12.9%)	(6.2%)	(5.4%)
LEISURE	(3.3%)	5.2%	(9.7%)	(1.7%)	(0.2%)	(0.6%)
DAY-TRIP	(6.0%)	4.9%	3.9%	(4.7%)	(6.2%)	(9.2%)
OVERNIGHT	(4.9%)	2.1%	(14.9%)	(3.0%)	1.6%	9.3%

Source: D.K. Shifflet & Associates, Ltd., with independent analysis by the Maryland Office of Tourism

Maryland Visitor Profile Trends

Top Ten Tourism Activities

The top ten tourism activities in Maryland are similar to the U.S. overall, with dining, shopping, entertainment and sightseeing ranked in the top four. Beach/waterfront ranks fifth in Maryland (seventh nationally), while group tour and attend sports event rank higher in Maryland than in the U.S.

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TOP TEN TOURISM ACTIVITIES

Maryland		United States	
DINING	30%	DINING	28%
SHOPPING	18%	SHOPPING	19%
ENTERTAINMENT	15%	ENTERTAINMENT	17%
SIGHTSEEING	12%	SIGHTSEEING	12%
BEACH/WATERFRONT	8%	GAMBLE	5%
GROUP TOUR	5%	NIGHTLIFE	5%
NIGHTLIFE	5%	BEACH/WATERFRONT	5%
ATTEND SPORTS EVENT	5%	THEME/AMUSEMENT PARK	4%
THEME/AMUSEMENT PARK	4%	PARKS (NATIONAL/STATE)	4%
VISIT HISTORIC SITE	4%	VISIT HISTORIC SITE	4%

Source: D.K. Shifflet & Associates, Ltd.

The top two destinations visited in Maryland are Baltimore and Ocean City.

The chart below details number of visitors, average travel party size, trip length, spending per trip and top feeder markets for those two destinations and for Maryland overall.

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MARYLAND AND TOP TWO DESTINATIONS TRAVELER SUMMARY, 2009

	Maryland	Baltimore	Ocean City	
Estimated share of tourists		26.4%	15%	
Equivalent person-trips	29.06 million	7.7 million	4.4 million	
Avg. travel party size	2	2.1	2.5	
Avg. length of trip (days)	1.6	1.8	2.8	
Avg. spending per trip	\$250	\$274	\$579	
Top 3 DMAs of origin	Washington, DC (30.3%) Baltimore (19.6%) Philadelphia (9.1%)	Washington, DC [21.1%] Philadelphia (10.5%) New York (9.3%)		

Source: D.K. Shifflet & Associates, Ltd., with independent analysis by the Maryland Office of Tourism

Maryland Visitor Spending

Spending by Maryland travelers increased in all travel categories from 2007 to 2008 (the last full year that data is available). Overall travel expenditures in Maryland increased 3 percent from 2007 to 2008, from \$14 billion (updated) to \$14.5 billion.



TRAVEL EXPENDITURES (IN MILLIONS)

	2008	2007	2006
TRANSPORTATION	\$3,815.3	\$3,586.4	\$3,494.6
FOOD	\$3,584.6	\$3,482.7	\$3,431.6
LODGING	\$2,525.7	\$2,434.3	\$2,329.0
SHOPPING	\$2,694.2	\$2,706.9	\$2,678.5
ENTERTAINMENT	\$1,835.7	\$1,803.5	\$1,774.6
TOTAL	\$14,455.5	\$14,013.8	\$13,708.5

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LODGING SECTOR TRENDS

he lodging sector is an important barometer of the health of the Maryland tourism industry. The Office of Tourism contracts with Smith Travel Research (STR), a leading lodging industry research firm, to provide monthly and annual lodging data for the State of Maryland and its counties. This data provides a level of detail that allows for nearly complete coverage of the State.

The following lodging measurements are detailed below:

- 1) Room Demand—reflects the percentage change in the number of rooms sold
- 2) Room Supply—reflects the percentage change in the number of rooms available
- 3) Room Rates—reflects the average cost per room
- 4) Room Revenue—reflects the percentage change in the amount of revenue collected
- 5) Occupancy Percent—reflects the percentage of rooms occupied

Calendar Year 2009 Analysis

Demand for Maryland's hotel rooms grew 1.1 percent, outperforming both the region and the nation, which both posted declines of 0.7 percent and 5.8 percent, respectively. Maryland's room supply grew by 5.3 percent from 2008; Maryland's room supply grew almost two-thirds more than the national growth and 25 percent more than the regional growth.

Average room rates for the State as a whole declined 5.5 percent to \$111.55, while the average U.S. room rate declined 8.8 percent to \$97.52 and the regional room rate declined 5 percent to \$115.12 in 2009. Room revenues, which are tied to room demand and room rates, declined 4.5 percent from 2008. Still, this drop in Maryland's room revenue change was better than both the nation and the region, which saw losses of 14.1 percent and 5.6 percent, respectively.

The following table details the five metrics for the U.S., Maryland, Maryland's counties (when available) and regions.



CALENDAR YEAR 2009 LODGING PERFORMANCE COMPARISON

	ROOM DEMAND PERCENT CHANGE	ROOM SUPPLY PERCENT CHANGE	AVERAGE ROOM RATE	AVERAGE ROOM RATE PERCENT CHANGE	ROOM REVENUE PERCENT CHANGE	OCCUPANCY RATE	OCCUPANCY PERCENT CHANGE
SEGMENT							
UNITED STATES	(5.8 %)	3.2%	\$97.52	(8.8%)	(14.1%)	55.1%	(8.7%)
MARYLAND	1.1%	5.3%	\$111.55	(5.5%)	(4.5%)	57.0%	(4.0%)
DC-DE-MD- VA REGION	(0.7%)	4.2%	\$115.12	(5.0%)	(5.6%)	56.8%	(4.7%)
MD COUNTIES							
BALTIMORE CITY	1.9%	8.6%	\$138.92	(10.7%)	(9.1%)	56.6%	(6.2%)
ALLEGANY	(0.1%)	5.1%	\$88.49	(2.5%)	(2.6%)	54.8%	(5.0%)
ANNE ARUNDEL	5.3%	5.7%	\$98.92	(10.4%)	(5.7%)	64.7%	(0.4%)
BALTIMORE	(4.1%)	1.0%	\$89.80	(6.4%)	(10.3%)	54.8%	(5.1%)
CALVERT	(5.7%)	0.0%	\$101.62	(0.5%)	(6.1%)	54.5%	(5.7%)
CECIL	(9.4%)	0.0%	\$69.73	(6.0%)	(14.9%)	45.1%	(9.4%)
CHARLES	(0.8%)	11.2%	\$86.54	(3.7%)	(4.6%)	51.2%	(10.8%)
FREDERICK	2.3%	0.0%	\$80.16	(3.0%)	(0.8%)	65.1%	2.3%
HARFORD	0.4%	7.7%	\$77.34	(1.6%)	(1.2%)	56.6%	(6.8%)
HOWARD	(1.3%)	3.1%	\$89.83	(8.1%)	(9.3%)	57.3%	(4.3%)
MONTGOMERY	0.7%	6.1%	\$125.22	(8.5%)	(7.8%)	61.6%	(5.1%)
PRINCE GEORGE'S	8.4%	10.7%	\$126.39	1.5%	10.1%	57.6%	(2.1%)
QUEEN ANNE'S	(8.0%)	0.0%	\$107.72	(7.1%)	(14.6%)	48.2%	(8.0%)
ST MARY'S	2.6%	12.9%	\$92.02	1.1%	3.7%	50.8%	(9.1%)
TALBOT	(0.9%)	0.0%	\$147.15	(4.2%)	(5.0%)	48.2%	(0.9%)
WASHINGTON	(2.1%)	4.7%	\$70.54	(0.7%)	(2.8%)	50.4%	(6.5%)
WICOMICO	(7.1%)	0.8%	\$80.61	(1.5)	(8.4)	46.3	(7.8)
WORCESTER	(2.9%)	1.0%	\$134.01	(0.8)	(3.6)	52.2	(3.9)
MD REGIONS							
WESTERN	(3.0%)	4.1%	\$77.00	(1.0)	(3.9)	51.6	(6.8)
CAPITAL	4.3%	7.5%	\$120.53	(3.6)	0.5	60.1	(3.0)
CENTRAL	1.5%	5.5%	\$106.21	(9.1)	(7.7)	59.0	(3.8)
SOUTHERN	(1.6%)	6.5%	\$96.68	0.0	(1.5)	52.5	(7.5)
UPPER EASTERN SHORE	(5.8%)	0.5%	\$119.12	(4.7)	(10.2)	47.1	(6.2)
LOWER EASTERN SHORE	[3.3%]	1.3%	\$125.10	(0.7%)	(4.0%)	50.9%	(4.6%)

Source: IHS Global Insight

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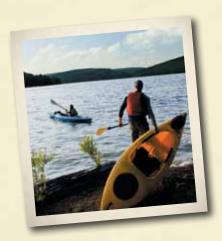
First Half 2010 Analysis

Unlike most visitor data, the STR lodging data is available on almost a real-time basis. This is extremely helpful for tracking trends so that we can make appropriate recommendations and adjustments.

Lodging room demand Statewide was up 8.7 percent year-to-date, compared to the same 6-month period in 2009. Maryland's demand outperformed the nation and the region. The number of rooms available (room supply) grew by 4.1 percent, reflecting a continued increase in the building or expansion of new rooms across the State. Room supply grew at a 60 percent faster pace than the nation, with the highest percentage of room additions in St. Mary's, Allegany and Charles counties.

Average room rates for Maryland as a whole fell 4 percent to \$108.03, with prices in Maryland during this period falling more than the nation and region. Room revenues, however, are rebounding, up 4.3 percent compared to the same 6-month period in 2009 due to the increase in demand.

Occupancy rates, which reflect changes in supply and demand for rooms, averaged 59 percent, a growth of 4.3 points from the 2009 6-month period, compared to 4.4 percent growth for the U.S. and 2.2 percent growth for the region.



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JANUARY-JUNE 2010 LODGING PERFORMANCE COMPARISON

	ROOM DEMAND PERCENT CHANGE	ROOM SUPPLY PERCENT CHANGE	AVERAGE ROOM RATE	AVERAGE ROOM RATE PERCENT CHANGE	ROOM REVENUE PERCENT CHANGE	OCCUPANCY RATE	OCCUPANCY PERCENT CHANGE	
SEGMENT								
UNITED STATES	7.0%	2.5%	\$97.18	(2.0%)	4.9%	56.4%	4.4%	
MARYLAND	8.7%	4.1%	\$108.03	(4.0%)	4.3%	58.9%	4.3%	
DC-DE-MD- VA REGION	5.6%	3.3%	\$114.87	(3.7%)	1.7%	58.1%	2.2%	
MD COUNTIES								
BALTIMORE CITY	11.1%	5.4%	\$136.96	(4.0%)	6.7%	60.9%	5.4%	
ALLEGANY	1.6%	12.1%	\$81.21	(6.6%)	(5.0%)	48.7%	(9.4%)	
ANNE ARUNDEL	12.3%	4.3%	\$94.81	(6.9%)	4.6%	69.6%	7.7%	
BALTIMORE	7.3%	3.7%	\$88.28	(5.1%)	1.9%	56.2%	3.5%	
CALVERT	5.7%	0.0%	\$97.93	(3.9%)	1.6%	56.7%	5.7%	
CECIL	7.2%	2.7%	\$67.99	(2.4%)	4.6%	46.5%	4.4%	
CHARLES	14.6%	10.8%	\$84.08	(6.7%)	6.9%	53.6%	3.4%	
DORCHESTER	13.3%	0.0%	\$145.45	(3.6%)	9.2%	48.5%	13.3%	
FREDERICK	(11.9%)	0.0%	\$82.86	2.3%	(9.9%)	57.8%	(11.9%)	
HARFORD	4.5%	9.2%	\$73.79	(6.3%)	(2.1%)	55.2%	(4.4%)	
HOWARD	10.2%	5.8%	\$86.34	(7.6%)	1.9%	60.6%	4.2%	
MONTGOMERY	13.2%	6.2%	\$123.47	(6.8%)	5.4%	66.7%	6.5%	
PRINCE GEORGE'S	8.8%	0.6%	\$127.66	(3.4%)	5.1%	63.6%	8.2%	
QUEEN ANNE'S	(4.2%)	0.0%	\$102.88	(1.8%)	(6.0%)	44.6%	(4.2%)	
ST MARY'S	29.9%	22.7%	\$87.87	(3.9%)	24.9%	53.7%	5.9%	
TALBOT	(1.4%)	0.0%	\$132.40	0.5%	(1.0%)	42.5%	(1.4%)	
WASHINGTON	4.7%	3.3%	\$71.39	0.6%	5.2%	49.3%	1.3%	
WICOMICO	4.7%	1.5%	\$74.70	(2.7%)	1.8%	44.7%	3.2%	
WORCESTER	4.8%	2.8%	\$113.21	0.5%	5.2%	46.0%	1.9%	
MD REGIONS								
WESTERN	2.7%	5.1%	\$75.16	(2.0%)	0.7%	48.3%	(2.2%)	
CAPITAL	8.3%	2.9%	\$121.57	(3.8%)	4.2%	64.3%	5.3%	
CENTRAL	10.1%	5.1%	\$103.68	(5.2%)	4.3%	62.3%	4.8%	
SOUTHERN	17.8%	11.7%	\$92.38	(4.4%)	12.6%	55.0%	5.5%	
UPPER EASTERN SHORE	4.0%	0.8%	\$108.06	(1.7%)	2.2%	45.3%	3.2%	
LOWER EASTERN SHORE	4.8%	2.5%	\$105.94	(0.0%)	4.8%	45.6%	2.2%	

Source: Smith Travel Research, Inc.





PRODUCT ANALYSIS AND ACCESS

From the family-friendly seaside resort of Ocean City to the majestic mountains in Western Maryland to exciting and cultural downtowns and historic small towns, Maryland offers visitors and residents a range of vacation experiences. In addition, Maryland's mid-Atlantic location and agreeable climate offer visitors the best of all four seasons and a host of year-round outdoor activities.

Access

Five interstate highways and several improved national highways provide easy access within a 400-mile radius. There is excellent rail service from major cities throughout the Northeast corridor and points north and south. Baltimore/Washington Thurgood Marshall International Airport (BWI) and three regional airports provide outstanding air service. Additionally, many Maryland destinations are accessible by boat.

TRAVEL DECISION MAKER/TARGET AUDIENCE DEFINITION

istorically, women are the travel decision makers—if not the final decision makers—they generally determine which destinations are in the consideration set. Maryland's media buys are targeted to adults 25-64 but with a strong skew to women; household income (HHI) \$75K+; well-educated; and working in managerial and professional occupations. They have made a trip of more than one day's duration within the United States in the past 12 months, which includes business, vacation, weekend travel and short trips.

The average travel party size to Maryland is two people. Less than one-fifth of trips are taken with children in tow. The media purchased for the spring/summer 2010 campaign targeted women both with and without children in order to reach a wider pool of prospective travelers.

This audience is further defined by special interest in Maryland's travel products, which may include but is not limited to the Civil War and the Underground Railroad; Maryland and America's byways; other cultural heritage programs; outdoor recreation and sporting events; and multicultural

sites/events. Marketing efforts targeting multicultural audiences comprise 13 percent of all advertising, development, and sales and marketing activities.

Another important component of Maryland's target audience is the travel trade. This audience includes group travel leaders, meeting planners, tour operators, travel agents and sporting event managers. Generally, these are not mass-media audiences but are targeted through domestic and international sales programs.

Primary Feeder Markets

Marylanders have historically represented the largest number of Maryland tourists. In 2009, for instance, 34 percent of all travelers to Maryland were from within the State, compared to 19 percent from Virginia and 15 percent from Pennsylvania.

Therefore, given budget constraints and the cost-prohibitive nature of the New Jersey-New York media markets, recent broadcast media purchases have focused on the Washington, DC, market (which represented 30 percent of travelers to Maryland in 2009); Baltimore (which represented 20 percent) and Philadelphia (which represented 9 percent). Outdoor billboards and bus shelters ran in May and June in Philadelphia and Washington, DC. Internet and print media still target the broader 400-mile geography.

Secondary Feeder Markets

However, distant secondary markets, including Toronto and Montreal in Canada, the European markets of England, Germany, France, the Benelux region and selected markets in Latin America, offer tremendous growth opportunities and a higher-per-capita expenditure because of the increased length of stay. Therefore, OTD will continue to concentrate on building this increasingly important visitor base through sales programs and promotions, often in conjunction with Capital Region USA (CRUSA), Maryland's collaborative marketing effort with Washington, DC, and Virginia. In addition, the meetings and incentive industry's spotlight will shine on Baltimore and Maryland as the city hosts the inaugural AIBTM—The Americas Meetings & Events Exhibition and America Meetings Week, June 19–24, 2011. This event will bring 3,000 domestic and international meeting and incentive professionals to the State, many for the first time.

Maryland Byways Marketing Research

The Office of Tourism has a strong partnership with the State Highway Administration's (SHA) Maryland Scenic Byways program. Joint initiatives have included the production of byways maps and guides, advertising campaigns, welcome center exhibits and international marketing.

Recognizing the State and federal investment in the development and marketing of byways, OTD and SHA commissioned extensive consumer research on byways travel users to guide future byways development and marketing.

Phase I of the research project was quantitative, utilizing an online survey in seven key feeder markets. 1,039 travelers 18 years of age or older were queried about their interests and perceptions of general travel, travel to Maryland specifically and travel on Maryland byways.

The findings confirmed that regional residents have a positive and consistent image of Maryland and Maryland byways products and delivery. A specific travel segment—the "touring" trip—was recognized as a valuable market to target, because these travelers spend more and participate in more activities during their trips.

Additional insight about the touring group includes—

- >> Touring visitors spend more per total trip, take longer trips and travel with more people than overall Maryland travelers.
- Touring travelers are more likely to stay in paid accommodations than the general overnight traveler.
- » Upwards of 80 percent of the overnight touring market originates out-of-state.
- Touring travelers report much higher participation rates in tourism activities across the board—with an especially higher rate of visiting historic landmarks and museums, fine dining, visiting national and State parks, visiting the beach/waterfront, visiting art galleries, swimming and boating/sailing.
- Touring travelers skew more heavily male—55 percent versus 47 percent of general overnight visitors.

This byways user profile will be extremely helpful in the media planning and outreach for the upcoming commemorations of the Civil War, Harriet Tubman and the War of 1812.

Phase II of the research project was qualitative, utilizing focus groups in five key feeder markets. Potential byways travelers were probed on how they research travel, trip planning and trip logistics. Participants identified marketing material preferences including the most attractive sizes, aesthetics and content for byways guides.

The input from these focus groups will guide the development of new byways collateral materials—both printed and online—as well as an integrated marketing campaign promoting byways and the authentic experiences available as you travel.

COMPETITIVE ANALYSIS

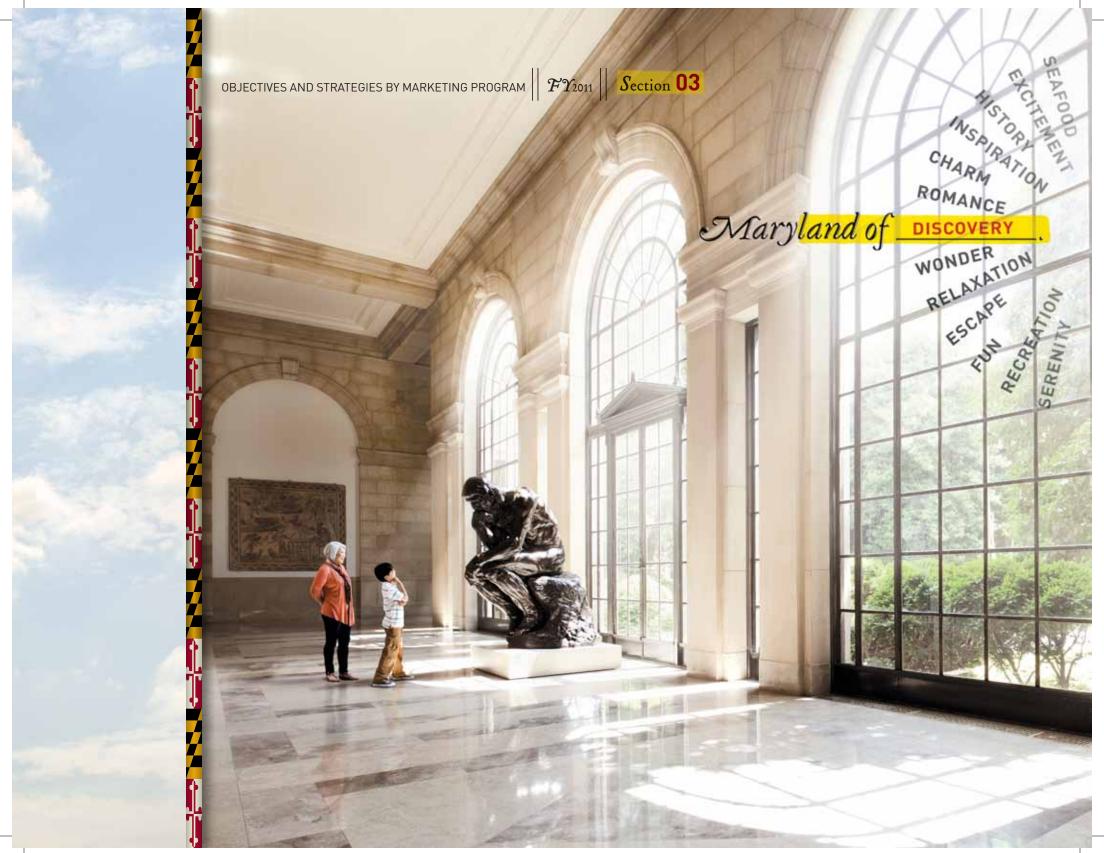
ompetition for the consumer's discretionary dollar is fierce. There are many other items consumers can choose to purchase besides travel, and other marketers are outspending us.

The U.S. Travel Association reported that in 2010, tourism in the United States will generate nearly \$750 billion in visitor spending, 5 percent more than in 2009. In the race for consumer travel dollars, states spent nearly \$738 million in domestic advertising and sales promotion to encourage travelers to choose their particular destination.

Maryland's closest regional competitors—West Virginia, Virginia and Pennsylvania—had budgets of \$18.1 million, \$14.7 million and \$11.2 million, respectively, for state tourism office funding and tourism marketing grant programs in FY 2010. Maryland's FY 2010 budget was \$7.9 million. Adjusted for inflation, FY 2010's appropriated dollar amount had 50 percent less buying power for marketing Maryland's tourism assets than the FY 2000 appropriation.

The competition for tourism, convention and investment dollars is relentless. This competitive marketplace means that OTD has to work more creatively to continue to build upon its recent successes in generating interest in Maryland as a destination. OTD will need to continue to track performance measurements and adjust marketing strategies accordingly in order to achieve our mission of increasing visitor spending.

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Objectives and Strategies by Marketing Program

MARYLAND DEVELOPMENT BOARD

Office of Tourism Development Administrative Management

The work of the Office of Tourism Development (OTD) is guided and supported by hospitality industry leadership through an appointed board of executives representing attractions, food service, lodging, retail and transportation, as well as representation from Destination Marketing Organizations and Maryland's General Assembly.

The mission of the Maryland Tourism Development Board (MTDB) is to provide Statewide leadership in policy development, management and competitiveness to ensure that Maryland enjoys greater economic benefits from travel and tourism spending.

OBJECTIVES:

Provide leadership and routine review of the budget, staff and other resources allocated to OTD for tourism development purposes.

Ensure future growth and stability of Statewide tourism development through the management of the MTDB Strategic Plan and Marketing/Development Plan.

KEY STRATEGIES FOR FY 2011:

Continue to implement the FY 2010-2015 5-Year Strategic Plan, including the following strategies and tactics:

Continue efforts to ensure long-range funding stability for both the Office of Tourism and the Maryland Tourism Development Board.

Develop public/private partnerships to supplement General Funds appropriated to OTD and the MTDB funds.

Ensure grant guidelines annually align with evolving marketing priorities and promote the Maryland brand.

Develop a comprehensive industry-wide communications plan to educate the public and public officials about the value of the tourism industry and its impact on the quality of life for all citizens of the State. Support the formation of a grass roots industry advocacy campaign promoting the value and importance of industry-generated employment.

OFFICE OF TOURISM DEVELOPMENT

Administrative/Management

The goal of the Administrative/Management team is to provide the necessary organizational supervision and direction to ensure that the resources of staff, time and budget are properly deployed to produce measurable results in accordance with the department's core mission.

OBJECTIVES:

Manage and monitor the OTD staff, prioritizing and balancing the workload in order to maximize efficiency and effectiveness. Ensure that sufficient staff is deployed to accomplish the mission and the recommendations of the DBED FY 2011 Action Plan.

Provide and maintain an internal work environment that is efficient, effective and responsive to the mission.

Establish and maintain relationships with other agencies, tourism industry associations, organizations and institutions to ensure that Maryland's tourism development activities are best-in-class, as well as delivering the highest return on investment.

KEY STRATEGIES FOR FY 2011:

Maintain full staffing. Add contractual employees as necessary to assist in the plan preparation and implementation (outreach, partner and sponsor relations) for the War of 1812 Bicentennial Commission efforts.

Continue to implement the FY 2011-2015 5-Year Maryland Tourism Development Board Strategic Plan, including regional meetings to engage stakeholders in the process, as well as offer technical assistance and training on marketing, product development and customer service.

Maintain membership and active leadership in State, regional and national organizations.

Maintain ongoing collaborative relationships with Destination Marketing Organizations, Arts and Entertainment Districts, Main Streets and Maryland Heritage Areas to ensure proper State and local coordination.

Continue leadership in planning and sponsoring the Maryland Tourism & Travel Summit, the foremost education program available to all of Maryland's tourism community.

Foster interagency cooperation between local, State and national agencies.

COMMUNICATIONS AND MARKETING SERVICES

Domestic Advertising-Media and Production

The goal of the Domestic Communications and Marketing program is to raise the awareness of and interest in Maryland as a travel destination. Given limited resources, OTD must focus the State's marketing efforts on those consumers, time periods and markets that will reap the highest return on investment.

Marketing efforts have historically been measured by conversion studies, which are based on lead generation from telephone inquiries, reader service labels and website requests. Given that the Internet is now the chief source of travel information, many consumers are no longer requesting travel information. Other means to measure OTD's advertising effectiveness must be researched and implemented.

OBJECTIVES:

Focus communication efforts on Maryland's most compelling tourism messages, as determined by recent consumer research (both quantitative and qualitative).

Target the highest-value prospects, based upon consumer research and economic conditions.



KEY STRATEGIES FOR FY 2011:

Continue to leverage the State's marketing dollars by offering strategic advertising cooperative programs. Launch county co-op advertising program utilizing the new research-driven "Maryland of ______" thematic creative.

Continue to maintain a Maryland marketing presence year-round, including annual online search efforts and "Maryland Minute" radio sponsorships in Baltimore, Philadelphia and Washington, DC.

Test running ads on Facebook, given importance of social media to core audience.

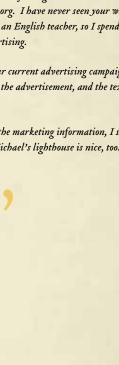
Just sat down to lunch to read Maryland Life Magazine. Loved the inside cover advertisement for visitmaryland.org. I have never seen your website, but my fiancé is in marketing and I am an English teacher, so I spend a LOT of time looking at the messages in advertising.

I LOVE the roulette wheel theme of your current advertising campaign. It was cool to see the historical photo in the advertisement, and the text was convincing.

When I went on the website to look for the marketing information, I saw how the wheel spins—WONDER and St. Michael's lighthouse is nice, too.

Good job.

Natalie Evans, Sykesville Resident



COMMUNICATIONS AND MARKETING SERVICES

Public Relations

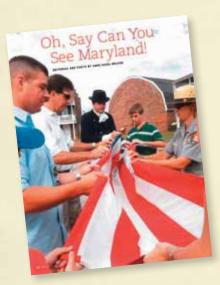
The Public Relations team works to secure third-party editorial coverage of the State as a travel destination. This work is accomplished through outreach to and servicing the needs of respected travel editorial professionals in print and electronic media.

The third-party endorsement of Maryland as a travel destination is a compelling motivator for consumers planning their leisure and business activities. Increased coverage of Maryland as a destination correlates to increased visitation and more tourism-related revenue to the State.

OBJECTIVES:

Secure "Destination Maryland" media placements that have a value of at least \$15 million.

Continue to promote the significant impact that the tourism industry has on the economic health of Maryland, and position the division's leadership as subject matter experts for the media.



KEY STRATEGIES FOR FY 2011:

Continue to highlight timely and thematic tourism activities through the "Maryland Spotlight" program.

Utilize public relations counsel to expand local, regional and national publicity efforts.

Target both in-state media outlets and travel editorial professionals in Maryland's primary and secondary feeder markets through public relations campaigns, press outreach, familiarization tours and missions.

Craft and launch a communications platform for the FY 2011-2015 commemorations period, and provide promotional support for upcoming commemorations activities.

Continue to work with CRUSA's international representatives and public relations firms, with a particular focus on promoting Maryland's Scenic Byways.



I want to take this moment to thank you and everyone who was involved in the "Buy Local" press trip on July 15 and 16. I appreciate being included among the writers invited and know there will be at least two articles realized as a result of my participation.

I especially want to compliment Connie Yingling and Camila Clark for all their efforts. I've had the pleasure of being "taken care of" by these delightful professionals in the past and know how much they give of their time and energy. Your office should consider them Maryland treasures ...

Best regards,

Margaret Horton Edsall



COMMUNICATIONS AND MARKETING SERVICES

Publications

High-quality, creative and informative print and electronic publications are designed to inspire consumers to choose Maryland as a travel destination, encourage them to stay longer and motivate them to return as repeat visitors.

Additional vehicles target the tourism industry, communicating OTD's results and marketing programs.

OBJECTIVES:

Retool publications to incorporate the new research-driven
"Mary<mark>land of _____"</mark> thematic creative, when appropriate.

Inform the travel industry of OTD's activities and promotional and marketing opportunities through regular communication, both in print and electronically.

Produce high-quality print and online communications vehicles that support priority visitor experiences and other marketing initiatives, such as Maryland's Scenic Byways.

Work with private sector partners to offset expenditures and increase distribution (Golf Guide and Field Trip Guide).

Work with publishing contractor on alternate formats for the printed Calendar of Events and Destination Maryland to ensure savings on paper/printing/fulfillment as well as maximizing revenue opportunities.

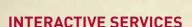
Improve the completeness, timeliness and ease of transmission of event and attractions information through the addition of an online event database/aggregator.

KEY STRATEGIES FOR FY 2011:

Publication	Audience	Distributed	Quantity	
This Month in Maryland e-newsletter	Consumer	Monthly	Goal: 50,000	
Maryland Field Trip and Teachers' Guide	Educators	September 2010	3,000	
Profile Sheets	Tour & Travel Trade	October 2010	500	
Maryland Calendar of Events	Consumer	December 2010	200,000	
Golf Guide Annual	Consumer	Consumer Spring 2011		
African American Heritage Travel Guide	Consumer	Spring 2011	50,000	
Destination Maryland	Consumer	March 2011	200,000	
Scenic Byways Map & Guide	Consumer	May 2011	TBD	







Website Development/Maintenance, E-Marketing & New Media Strategies

The interactive services unit enhances the Division of Tourism, Film and the Arts' Web, social media and mobile applications. Maryland's customers are increasingly using technology to make their travel decisions, and it is imperative to the State's revenue goals to provide the best that technology has to offer.

OBJECTIVES:

Ensure that Maryland has the most effective consumer website to engage those researching Maryland as a travel destination.

Increase the number of unique individuals touched by interactive marketing efforts, including Web marketing, email marketing and social media engagement.

Extend marketing reach and frequency through new technologies and email communications.



KEY STRATEGIES FOR FY 2011:

Continue to enhance VisitMaryland.org as a proactive consumer trip-planning tool, investigating and integrating new interactive opportunities, as well as new OTD programs. Add consumer-focused content on the Maryland Green Travel program, highlighting hotels, marinas and other tourism assets that have been recognized for their efforts in sustainability.

Utilize learning from the consumer website effectiveness survey to refresh content and technology, as appropriate. Trip Advisor hotel reviews will be added to the website fall 2010, due to the high level of interest in consumer reviews by Visit Maryland Web users.

Launch Phase II of the VisitMaryland Interactive Map, adding core tourism businesses such as lodging, restaurants and sporting venues. Update and refresh current content, with a particular emphasis on adding more photography and video.

Work with customer acquisition firm to grow subscriber base of monthly consumer e-newsletter.

Expand social media efforts-Facebook, Twitter-and take "Help Desk" on the road to assist local stakeholders develop "Tweet Deals" and fan pages.

Explore new products (mobile applications, games, etc.) that are aligned with OTD priorities and/or programs (Civil War Trails, Interactive Map, War of 1812 Bicentennial).

Monitor contracts to maintain, enhance, manage and host OTD's website and database to ensure flexibility, reliability and better performance, thereby increasing customer satisfaction.

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INTERACTIVE SERVICES

Inquiry Fulfillment: Database and Fulfillment Services

Maintain the "Visit Maryland" database of tourism assets for the OTD website, refreshing and enhancing the content on a consistent basis.

Ensure that the "Visit Maryland" database can be easily integrated for use across office programs—Call Center, Welcome Centers, kiosks, mobile applications and publications.

Utilize best-in-class customer relationship management systems in order to efficiently respond to tourism inquiries, delivering the services and/or resources that the prospective visitor requires.

OBJECTIVES:

Provide the most persuasive and comprehensive information on Maryland tourism products and events. Ensure that information is readily available to prospective visitors at every travel planning opportunity—pretrip and during trip.

Quickly and efficiently respond to consumers who request Maryland travel information. Advertising activities generated more than 60,000 requests for travel kits in FY 2010, with another 33,000 requests submitted from the VisitMaryland website.

KEY STRATEGIES FOR FY 2011:

Launch new "Visit Maryland" custom database of tourism assets and new "MDTrips" CRM application based upon Database Work Group's recommendations for website/publications, Welcome Centers and Fulfillment/Call Center.

Add restaurants to the "Visit Maryland" database. This not only will add a major tourism category to the website, it is critical for the kiosk users at the I-70 Welcome Centers as well as necessary for the next phase of Maryland Green Travel.

Ensure that new OTD programs and products, such as the electronic calendar of events and tourism interactive map, integrate efficiently with the "VisitMaryland" custom database.

Add a database of group tour-focused tourism assets to the "Groups" section of VisitMaryland.

Continue to track Fulfillment and Call Center expenditures on a monthly basis, invoicing DMOs for their respective services and correlating results to marketing activities.

Manage and maintain a fully integrated technology program and infrastructure for internal (Welcome Centers, kiosks, Call Center) and external (Fulfillment Center) use.



Product Development Initiatives

The Tourism Development team coordinates programs to recognize, develop, integrate and market new and existing tourism resources. The team provides counsel on technical and/or financial assistance and incentives to tourism partners Statewide, including a new Green Certification Program for tourism businesses. Additional objectives include the promotion of Maryland's travel products via direct sales, Call Center and Welcome Centers; securing alternative funding for priority tourism initiatives; advocacy for appropriate tourism signage; and management of the County Cooperative Grant Program. Working with local stakeholders through cooperative alliances and partnerships, the Tourism Development team develops consumer-focused products that will provide a sustainable competitive advantage in the marketplace.

OBJECTIVES:

Ensure that upcoming commemorations (Civil War Sesquicentennial, Harriet Tubman Centennial, War of 1812 Bicentennial) have appropriate visitor-ready product, and market appropriately.

Consistently address the need for tourism signage Statewide.



KEY STRATEGIES FOR FY 2011:

Manage the Maryland Civil War Trails Initiative, including technical assistance for the Civil War Sesquicentennial Commemoration.

Provide administrative support for the War of 1812 Bicentennial Commission and manage the Star-Spangled Banner Trail and Byway.

Manage the Maryland Underground Railroad (UGRR) Initiative, including technical assistance for the Harriet Tubman Underground Railroad State Park and Byway.

Coordinate with other State agencies on the development and marketing of the State's collection of Maryland and America's byways.

Coordinate with the State Highway Administration, the DMOs and local stakeholders to implement the Tourism Area and Corridor (TAC) Sign Program, as well as the Attractions Sign Program.

Continue to seek out and secure funding for key projects from alternative funding sources, such as the federal government and corporations/foundations.

Coordinate with other State agencies and industry stakeholders on the development of Phase II of the VisitMaryland Interactive Map.



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WAR OF 1812 BICENTENNIAL COMMISSION

A Maryland War of 1812 Bicentennial Commission was established by Executive Order in September 2007, with the mission to stimulate and coordinate investment in the commemoration of the bicentennial of the War of 1812 for maximum benefit to Marylanders.

The Commission is staffed by members of the Division of Tourism, Film and the Arts and is an important partner of the Tourism Development unit in developing and marketing this exciting opportunity to elevate Maryland globally as a premier location to live, work and visit, and to increase economic opportunities for Marylanders.

OBJECTIVES:

To ensure all Marylanders have the opportunity to participate, learn and benefit from bicentennial activities.

To ensure all resources in Maryland related to the War of 1812 are identified, protected, sustainably developed and interpreted.

To ensure all Marylanders have engaging opportunities to learn and that Maryland is recognized as the most important portal to understanding the significance and relevance of the events of the War of 1812.

To ensure increased tourism investments and expenditures from which all Marylanders have the opportunity to benefit.

KEY STRATEGIES FOR FY 2011:

Provide administrative support for the War of 1812 Bicentennial Commission and manage the Star-Spangled Banner Trail and Byway, including projects funded with Scenic Byways grants.

Continue planning for signature events, including collaboration with the U.S. Navy, Operation Sail and Sail Baltimore to plan the June 2012 Naval Review and Air Show.

Continue to enhance the Commission's website—www.StarSpangled200.org.—as more information about sites, events and partners is finalized.

Promote Maryland's new standard license plates featuring a bicentennial theme that directs consumers to www.StarSpangled200.org.

Promote the issuance of the \$5 gold and \$1 silver commemorative coins in early 2012 by the U.S. Mint. Proceeds from the coin sales will help fund Commemoration activities.

Conclude the sixth and final Star-Spangled 200 Conference, working to ensure Statewide collaboration in upcoming bicentennial activities.

Work with MSDE to develop field trip itineraries to encourage teachers and students to have a "Star-Spangled" experience outside the classroom. OTD's sales team can also use itineraries in their efforts to attract out-of-state field trips.





Sustainable Tourism

Responding to consumer demand, many segments of the hospitality and tourism industry in Maryland (e.g., lodging, food service, attractions, etc.) already encourage and have adopted green and sustainable practices. The Maryland Office of Tourism, in partnership with sister State agencies, industry associations and environmental leaders, developed the Maryland Green Travel program to recognize and encourage eco-friendly practices.

OBJECTIVES:

Improve the perception and reality of Maryland as a green destination.

Recognize, promote and expand green and sustainable practices in Maryland's tourism industry.

Reduce environmental impacts from tourism operations.



KEY STRATEGIES FOR FY 2011:

Continue to collaborate with industry partners and environmental leaders in the development and execution of Maryland Green Travel.

Improve and simplify the Web-based criteria and application process for industry members to voluntarily self-certify as meeting desirable levels of sustainable practices. Redesign the hotel application, as well as roll out the program to restaurants, attractions, visitor centers, marinas and campgrounds.

Promote participating facilities on the tourism website/publications. Develop a special section on the tourism website to highlight members of Maryland Green Travel.

Continue to collaborate with the Maryland Department of the Environment and the Maryland Department of Natural Resources to align the Office of Tourism's Green Travel program with other Governor's Smart, Green and Growing initiatives—such as the Maryland Green Registry and the Clean Marina program. Offer certified Clean Marina facilities a free listing on the VisitMaryland website, and recognize them as Green Travel Partners.

Launch a comprehensive and sustained outreach to public and private sector partners to ensure Statewide participation in the self-certification program, as well as the promotion of Maryland Green Travel initiatives. Take the Maryland Green Travel "Help Desk" on the road to local tourism meetings as well as offer training via conference calls or webinars.

Add a data layer to the Visit Maryland Interactive Map that highlights certified facilities.

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County Cooperative Grant Program

The Tourism Development team is responsible for the management of the County Cooperative Grant Program, working under the direction of the Maryland Tourism Development Board and the Department of Business & Economic Development.

OBJECTIVES:

Support financially those political subdivisions that have presented viable marketing plans consistent with the State's annual tourism marketing plan.

Support financially those political subdivisions that have increased tourism tax revenues from the Comptroller-determined Tourism Tax Codes (an Office of Tourism performance metric).

Ensure grant guidelines align with evolving marketing priorities and promote Maryland's core brand attributes.

KEY STRATEGIES FOR FY 2011:

Continue to administer the program, which includes, but is not limited to: preparing programmatic reports; participating in the Maryland Destination Marketing Organizations' Grant Review Committee meetings; reconciling reimbursement requests; administering grant documents; updating the online program, etc.

Support the Maryland Tourism Development Board and the Secretary of the Department of Business & Economic Development in developing new guidelines and marketing co-operative programs for FY 2011, in recognition of the increase in allocated funds as set forth in the Tourism Promotion Act.

Measure effectiveness of program—leveraging of funds; increases in county performance metrics (taxes/advertising inquiries/hotel rooms sold, etc.). Work with DMO committee to develop new co-operative programs to attract visitors to Maryland.



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Customer Contact Program

Welcome Centers and the Maryland Call Center provide comprehensive and high-quality information and services to individuals and groups who inquire about the State's tourism assets, educating these prospective visitors about Maryland's quality attractions, accommodations and services, and generating additional economic impact for the region and the State.

OBJECTIVES:

Utilize the Welcome Centers as "out-of-home" media outlets-promoting marketing initiatives on an ongoing basis, particularly the Monthly Spotlights and upcoming Commemorations.

Manage and monitor all aspects of facility operations related to Welcome Centers, and ensure that the State's investment in this program is deployed efficiently.

Manage and administer the new in-house Maryland Call Center.



KEY STRATEGIES FOR FY 2011:

Manage, supervise, and train staff and volunteers at four Welcome Centers-I-95 North, I-95 South, I-70 East and I-70 West.

Manage, supervise and train staff for the new in-house Maryland Call Center.

Finalize the design and installation of exterior exhibits and kiosks for the reconstructed I-70 Welcome Center. Exhibits and kiosks are scheduled for installation in early December 2010. These exhibits and kiosks will impact Rest Area visitors who may not take the time to enter the Welcome Center.

Design and fabricate marketing exhibits that promote upcoming Commemorations and the Scenic Byways that link these experiences.

Review and recommend partnership and advertising opportunities at the four Welcome Centers—both individually and as a whole.

Track and collect Welcome Center and Rest Area data which includes, but is not limited to, bathroom door counts, Welcome Center visitor counts, motorcoach usage, hotel reservation revenue, staff outreach and marketing promotions. Develop a simple "monitor" of this activity and its impact on the community.

Track and collect Call Center data which includes, but is not limited to, call volume, call source, call type, brochure orders and information requests.

Cross-train Call Center staff to assist with social media outreach.

Launch annual customer service training, including a Maryland tourism track, for county and local visitor information centers and call center staff.

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TRAVEL TRADE SALES

Domestic and International Sales

Travel Trade Sales promotes Maryland's travel products to domestic and international trade and consumer markets, predominantly through trade association partnerships, marketplace participation and sales missions. The target markets are often third-party sales channels—and include AAA Clubs, tour operators and travel planners, group leaders and reunion planners, meeting planners and incentive travel planners, receptive tour operators, retail travel agents, student travel providers, travel wholesalers, consumers and other travel planners.

OBJECTIVES:

Expand and strengthen marketing alliances with Maryland's private sector business partners and local tourism offices. Coordinate marketing partners, maximizing sales of Maryland destinations to potential clients through sales promotions and lead distribution.

Market Maryland's travel and tour products directly to a variety of third-party distribution channels through trade shows, sales missions and marketplaces.

Leverage funds \$7 to \$1 by partnering with Virginia, Washington, DC, and the Metropolitan Washington Airports Authority to promote Maryland and Capital Region USA (CRUSA) to overseas travelers.



KEY STRATEGIES FOR FY 2011:

Coordinate the efforts to maximize Baltimore's successful bid for AIBTM—The Americas Meetings & Events Exhibition and America Meetings Week, June 19–24, 2011. This event will bring 3,000 domestic and international meeting and incentive professionals to the State, many for the first time. Work with the Maryland Association of Destination Marketing Organizations and the private sector on the Maryland Pavilion tradeshow opportunity.

Encourage and support regional marketing initiatives and familiarization (FAM) tours developed by Maryland's tourism partners. Coordinate a FAM tour for large volume tour operators that highlights Star-Spangled Banner Bicentennial products.

Coordinate marketing partners' sales efforts to meeting and sporting events planners through the management of a strategically focused tradeshow cooperative booth program. Leverage OTD staff and financial resources with county and private sector partners.

Arrange for Maryland partners to have direct contact with clients through sales "blitz" promotions, including Maryland on the Road Enterprises (MORE), and Mini-MORE.

Participate in the International PowWow Marketplace, targeting international trade and press in our primary target markets of the United Kingdom, Germany and Canada, and the secondary markets of France, Belgium, the Netherlands, Mexico and Brazil.

Survey county and private sector partners regarding a more robust Canadian sales effort, given Canadian ties to upcoming Civil War, Harriet Tubman and War of 1812 commemorations.





The Research Unit provides quantitative and qualitative research analysis to support OTD's mission of continued economic growth from the tourism industry, as well as broader programming support to DBED.

OBJECTIVES:

Provide benchmarks of the importance of the tourism, travel, leisure, hospitality and recreation industries to Maryland's economy.

Track and analyze Maryland and U.S. visitor volume, trip trends and visitor profiles.

Assess the performance of Maryland's tourism-related industries in order to benchmark Maryland against other states and the nation as a whole.

Track performance and measure the effectiveness of the Maryland Office of Tourism programs to ensure the highest return on the State's investment.

Assist tourism industry partners and agencies on collaborative tourism research projects.

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KEY STRATEGIES FOR FY 2011:

Continue in partnership with the Destination Marketing Organizations to commission an economic impact study that will provide comprehensive data on the impact of Maryland tourism in terms of expenditures, jobs, payroll and tax revenue.

Utilize data from other sources such as Smith Travel Research, the Comptroller's office and national travel trend sources to benchmark Maryland's tourism economy's performance. Continue to track the performance of tourism tax revenue by county as determined by the Tourism Promotion Act of 2008.

Track, analyze and report key tourism performance indicators via the Monthly Tourism Monitor, the monthly Governor's StateStat report, the Department of Budget and Management's Managing for Results program and other reporting mechanisms as needed.

Provide ongoing research support to OTD staff, stakeholders and State agencies. In FY 2011, this includes project management and technical assistance for the 2010 Maryland State Park Visitor Survey.

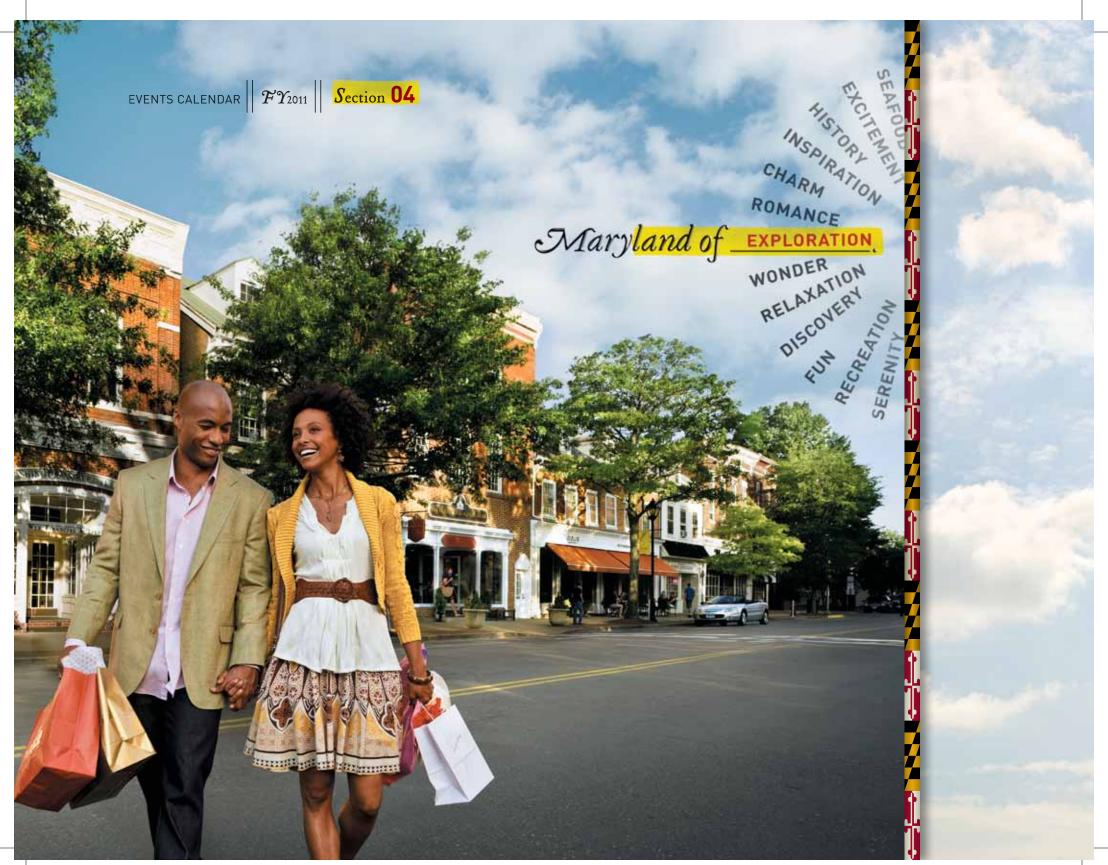
Use visitor profile data to determine OTD's markets, trip trends and most valuable prospects. Develop a target audience profile for byways and commemoration travelers.

Refine methods for understanding the economic impact of Welcome Centers.

Complete best practices research on workforce development activities.

Monitor research conducted for the Capital Region USA (CRUSA).

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July 20	010		
1 1–15	Maryland on the Road Enterprise (MORE)	Cleveland & Columbus, OH	Rich Gilbert
Augus	t 2010		
27–30	Student & Youth Travel Association Marketplace	Sacramento, CA	Rich Gilbert
31-Sept.	1 Travel Expo - New York	New York State	Rich Gilbert
Septer	mber 2010		
8–9	HSMAI's Affordable Meetings-National	Washington, DC	Sandy Stilling
12-15	Virginia Motorcoach Association Marketplace	Charlottesville, VA	Rich Gilbert
12-15	CRUSA Sales Mission to Paris	Paris, France	Kimberly Petersen (CRUSA)
14	US Department of Commerce Conference	Washington, DC	Becca Dougherty
14–17	MATPRA Media Marketplace	Gettysburg, VA	Connie Yingling
16	CRUSA Receptive Operator Reception	Washington, DC	Rich Gilbert
16–18	Ninth Maritime Heritage Conference	Baltimore, MD	Kate Marks
21–22	NASC Market Segment Meetings	Denver, CO	Terry Hasseltine
22-24	Sports Link & Olympic Assembly	Colorado Springs, CO	Terry Hasseltine
28-20	Mini-Maryland on the Road Enterprise (Mini-MORE)	Northern & Central NJ	Rich Gilbert
29-Oct 3	Pennsylvania Outdoor Writers Association Pow Wow	Ocean City, MD	Connie Yingling
Octobe	er 2010		
15–16	Maryland State Educators Association (MSEA)	Ocean City, MD	Rich Gilbert
18-22	TEAMS Conference & Expo	Charlotte, NC	Terry Hasseltine
25-29	CRUSA Sales Mission to Mexico	Mexico	Kimberly Petersen (CRUSA)
26-28	U.S. Travel Association Marketing Outlook Forum	Las Vegas, NV	Becca Dougherty
31–Nov 3	Ontario Motorcoach Association Marketplace	Niagara Falls, ONT	Rich Gilbert
31	OMCA-Access Marketing Buyers Reception	Niagara Falls, ONT	Rich Gilbert
Novem	nber 2010		
3–5	Maryland Tourism & Travel Summit	Loews Annapolis Hotel	Denise Konopacki
9	Greater New Jersey Motorcoach Association (GNJMA)	Atlantic City, NJ	Rich Gilbert
10	Star-Spangled 200 Regional Conference	Baltimore, MD	Kate Marks
13-17	National Tour Association Marketplace	Montreal, Quebec	Rich Gilbert
17-18	Maryland State Parks Managers Meeting	Garrett County, MD	Becca Dougherty
23	HSMAI's Meetings Quest	Washington, DC	Sandy Stilling
29-Dec 2	EIBTM: The Global Meetings & Incentives Exhibition	Barcelona, Spain	Rich Gilbert

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Decen	nber 2010		
2	FIFA World Cup 2018/2022 Decision		
5-7	USA Track & Field Convention	Virginia Beach, VA	Terry Hasseltine
12–15	US Sports Congress	Lee County, FL	Terry Hasseltine
Janua	ry 2011		
8–12	American Bus Association (ABA) Marketplace	Philadelphia, PA	Rich Gilbert
1st Quarte	er CRUSA Sales Mission to Brazil	Brazil	Kimberly Petersen, CRUSA
Febru	ary 2011		
5-13	Eastern Sport, Travel and Outdoor Show	Harrisburg, PA	Rich Gilbert
Late Feb	Expo Vacaciones Trade Show	Mexico City, Mexico	Kimberly Petersen, CRUSA
March	2011		
TBD	Travel Information Center Staff Workshop	Annapolis area (TBD)	Jennifer Jones
8–11	CRUSA Media Mission to London	London, England	Camila Clark
21–22	Pennsylvania Bus Association Marketplace	Harrisburg, PA	Rich Gilbert
23	Maryland Motorcoach Association Marketplace	TBD	Rich Gilbert
TBD	Travel Alliance Partners Board Meeting	Ocean City, MD	Rich Gilbert
TBD	Star-Spangled Tour Operator FAM	Maryland	Rich Gilbert
April 2	2011		
3–8	SportAccord	London, England	Terry Hasseltine
12–14	NASC Symposium	Greensboro, NC	Terry Hasseltine
13	Multi-State Civil War Trails Annual Meeting	TBD	Marci Ross
12–14	African-American Travel Conference	Virginia Beach, VA	Rich Gilbert
May 2	011		
21	CRUSA VIP Reception at Pow Wow	San Francisco, CA	Matt Gaffney, CRUSA
21–25	International Pow Wow	San Francisco, CA	Sales-R.Gilbert/Media-C. Clark
TBD	Maryland Society of Association Executives	Baltimore, MD	Rich Gilbert
June 2	2011		
18-23	Travel Alliance Partners (Tap Dance)	Louisville, KY	Rich Gilbert
20–24	AIBTM: The Americas Meetings & Events Exposition and America Meetings Week	Baltimore, MD	Rich Gilbert

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Partner Marketing and Advertising Opportunities

BROADCAST ADVERTISING

CBS Radio

- Three (3) week on-air radio schedule consisting of 35 weekly 60-second commercials on WWMX, WLIF, WJZ-FM and WJZ-AM. 105 spots per station for the flight for a total of 420 spots over the life of the campaign.
- » Online streaming commercials to include synched banner ad with direct one-click access to your website.
- >> Custom creative to include all writing and production services.
- Suaranteed 13,125 impressions with :15 video preroll using WWMX, WLIF, WJZ-FM, AOL and Yahoo.
- Suaranteed 48,000 impressions with banner ad advertising on WWMX, WLIF and WJZ websites with link to your website.
- Custom week-long Online contest, including (20):20-second promotional mentions on air and (20):20-second promotional mentions on the internet stream highlighting the promotion and contest, micro-site creation, link from site to your website, descriptive information on the splash page.
- Consistent service, creative adjustments, promotion creation and consulting throughout the campaign commitment.

COST \$15,000 net per 3-week cycle.

Representative: Jon Blum

410-825-1000

PRINT ADVERTISING

AAA World

- The publication is mailed to all AAA members in the Philadelphia Metro, Harrisburg/Lancaster/York Metro and Washington, DC, Metro (Northern Virginia, Suburban Maryland & DC areas).
- » Circulation: 1,891,000.
- Web banner on AAAWorld.com and year-round reader service, distribution of brochures in AAA office and online events calendar.

>> Cost to participate: \$5,495 for a 1/3-page and

\$2,995 for a 1/6-page.

» Issue Date: March/April 2011

Space Reservation Date: 1/07/11

Materials Due Date: 1/21/11

» Representative: Joe Fernandez

jfernandez@aaamidatlantic.com

703-222-4102





PRINT ADVERTISING

America's Best Vacations

» Full-color newspaper insert to run in DC, MD, NJ, NY, OH, PA, VA and Red Plum coupon book.

» Circulation:

Spring Issue: 1,326,000

>> Cost to participate: \$4,000 for a 1/12-page.

>> Issue Date: April 2011

2/4/11 » Space Deadline:

>> Materials Due Date: 2/11/11

» Representative: Lonnie Milligan

lonnie@collinsonpublishing.com

770-582-9700, x108

PRINT ADVERTISING

Great Vacations Getaways

>> Newspaper insert to run in Greater Mid-Atlantic, Boston to Atlanta & west to Ohio.

» Circulation:

>> Spring Issue: 2,200,000

>> Direct link to representative websites & strong coverage on gvginfo.com website for Maryland.

>> Cost to participate: \$3,593 for a 1/12-page and

\$7,186 for a 1/6-page for

Spring insert.

4/10/11 >> Issue Date:

>> Insertion Date: 1/25/11

Materials Due Date: 2/1/11

» Representative: Ken Tabacca

kent115@aol.com

410-531-2924

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PRINT ADVERTISING

Meredith Publications

>> Multiple-page section consisting of advertising and editorial.

» Circulation concentrated in CT, NY, NJ, PA, DE, MD, DC, OH.

» Section offered in the following publications:

» Better Homes & Gardens (Circ: 1,570,000).

» Ladies Home Journal (Circ: 854,100).

» Family Circle (Circ: 516,500)—circulation in NJ, Philadelphia, DE, Pittsburgh, MD, NY Metro.

» More (Circ: 334,000)—circulation along northeast coast DC to Maine.

» Total circulation: 3,685,000.

Cost to participate: \$26,294 for 1/3-page,

\$11,575 for Large Brochure Ad $(2\frac{1}{4}$ " x 3"),

\$7,006 for 2" Ad (21/4" x 2")

>> Issue Date: BHG (April 2011 Issue), LHG (April

2011 Issue), Family Circle (April 2011

Issue), MORE (May 2011 Issue)

>> Space Deadline: 1/07/11

» Materials Due Date: 1/14/11

>> Representative: Michael DeAnzeris III

miked@strategicmediasalesgroup.com

518-580-4500

PRINT ADVERTISING

O, The Oprah Magazine

» Full-page, four-color ad.

» Circulation:

(700,000) CT, DC, DE, FL, GA, MA, MD, ME, NH, NC, PA, RI, SC, VT, VA, WV.

>> Cost to participate: \$4,123 for an 1/8-page, 4C, with a

maximum of four co-op partners.

May 2011 >> Issue Date:

>> Insertion Date: 1/25/11

>> Materials Due Date: 2/1/11

>> Representative: Lynn Talbert

410-635-8621





PRINT ADVERTISING

Southern Living

- >> Multiple-page section consisting of advertising and editorial.
- >> Section runs in Mid-Atlantic Region:
 - » PA, NJ, NY, DE, MD, DC, VA.
 - » Circulation: 365,000.

>> Cost to participate: \$5,100 for a 1/6-page.

>> Issue Date: March 2011

» Space Deadline: 11/16/10

>> Materials Due Date: 11/22/10

>> Representative: Cynthia Cavanaugh

cavmediasales@comcast.net

410-296-7443

PRINT ADVERTISING

The Washington Post

- » One full-page, four-color in the Sunday Travel Section.
 - » 3x—April, May and June.
 - >> 12" Banner
 - >> 1/2-page of editorial.
 - » 1/2-page of paid advertising.
- » Circulation: 850,000.

>> Cost to participate: 2-col x 41/4" ad size: \$3,162—per month.

Limited to 6 participants each month.

>> Issue Date: 4/17/11 5/15/11 6/19/11

>> Space Deadline: 3/2/11 3/30/11 5/6/11

Materials Due Date: 3/9/11 4/6/11 5/13/11

» Representative: Ellen Gerhard

gerharde@washpost.com

202-334-7762

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OUT-OF-HOME

Digital Billboards—Baltimore

- » 4 weeks.
- » Placements: Spring 2011 (TBD)
 - >> 5-board network—665x/board/day
 - >> Total # of :10-second spots—93,100
 - » One image every 120 seconds.
- » Impressions A 25-54: 1,473,903.
- >> 4-week cost: \$15,000.*
 - » 2 Participants: \$5,000 each-31,033 spots each
 - » 3 Participants: \$3,750 each-23,275 spots each
 - » 4 Participants: \$3,000 each-18,620 spots each

*Total cost—will vary based on participation.

>> Representative: Eric Hendren

Clear Channel Outdoor erichendren@clearchannel.com

240-581-9640



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OUT-OF-HOME

Digital Billboards—Philadelphia

- » 4 weeks.
- » Placements: Spring 2011 (TBD)
 - » 8-board network—625x/board/day.
 - >> Total # of :08-second spot—148,960.
 - » One image every 128 seconds.
- » Impressions A 25-54: 6,250,749.
- >> 4-week cost: \$33,000.*
 - » 2 Participants: \$11,00 each-49,653 spots each
 - » 3 Participants: \$8,250 each-37,240 spots each
 - » 4 Participants: \$600 each-29,792 spots each

>> Representative:

Eric Hendren Clear Channel Outdoor erichendren@clearchannel.com 240-581-9640



^{*}Total cost—will vary based on participation.

ONLINE ADVERTISING

Madden Media

- » Ability to facilitate an Online Co-op Program.
 - >> Customized media plan based on geographic, demographic and/ or lifestyle target.





SALES COOPERATIVE OPPORTUNITIES

Marketing Target: Consumer

Opportunity: Brochure distribution program.

Description: Participant's brochures will be distributed to consumers at the Eastern Sport, Travel & Outdoor Show in Harrisburg, Pennsylvania, February 5-13, 2011. This is the largest outdoor show on the East Coast, attracting close to 400,000 potential visitors.

Cost: \$75-\$100, depending upon brochure size.

Marketing Target: Tour Operator

Opportunity: Maryland on the Road Enterprise (MORE).

Description: Five-day sales blitz targeting motorcoach operators, tour operators and travel planners in Cleveland and Columbus, Ohio. Includes approximately 25 prescheduled sales calls with operators who have the potential for overnight stays in Maryland.

Cost: \$1,250 (includes airfare, transportation and four nights' lodging).

Marketing Target: Tour Operator

Opportunity: Mini-Maryland on the Road Enterprise (Mini-MORE).

Description: Three-day sales blitz targeting motorcoach operators, tour operators and travel planners in the Northern and Central New Jersey area. Includes approximately 18 prescheduled sales calls with operators who have the potential for day-trips and overnight stays in Maryland.

Cost: \$600 (includes executive motorcoach transportation and two nights' lodging).

Marketing Target: Group Leaders

Opportunity: GLAMER marketing partnership.

Description: OTD coordinates a "Team" approach for Group Leaders of America. GLAMER shows are one-day tradeshows held in various cities and last about two hours. Each marketplace may attract between 75-200 group leaders who plan trips for their association, club and/or travel group. Each team member has representation at 12-15 shows via brochure distribution. Each participating partner must pay for and must staff one show, agreeing to market Maryland and the other partners. All partners receive a complete mailing list from each show along with information on the types of tours planned by these group leaders.

Cost: Approximately \$500 and travel expenses associated with one tradeshow. Booth space is assigned on a first-come basis, and rates are negotiated with GLAMER.

Marketing Target: Group Leaders

Opportunity: Tradeshow Booth co-ops.

Description: Maryland purchases booth space in tradeshows that offer exposure to group leaders and tour operators in OTD's target markets. You can share in that booth space at a reduced cost. All booth partners must agree to promote the State as well as their own product. Potential shows include Travel Expo-New York, the Greater New Jersey Motorcoach Association (GNJMA) and others.

Cost: Varies (\$250-\$535 plus travel).

Marketing Target: Group Leaders

Opportunity: Pennsylvania Bus Association (PBA), Maryland Aisle.

Description: All Maryland booths are located in one aisle. We will unify the Maryland area with banners and aisle carpet.

Cost: Individual booth space and travel.

Marketing Target: Student Travel

Opportunity: Maryland State Educators Association (MSEA).

Description: Join in the Maryland booth to directly promote to 1,500 Maryland school teachers. This is an excellent opportunity to sell our Maryland attractions and destinations as great field trip opportunities. You must assist with stuffing 1,200 bags on prior Thursday and staffing on Friday.

Cost: \$150 plus travel expenses.

Marketing Target: International

Opportunity: U.S. Travel Association's International Pow Wow Show, San Francisco, CA.

Description: Pow Wow is the travel industry's premier international marketplace, and is the largest generator of American travel. Includes three days of intensive prescheduled business appointments with international tour operators, receptive operators and media from Maryland's top feeder markets. At Pow Wow, the Maryland, Virginia and Washington, DC, booths are located together to create a unified "Capital Region USA" aisle. CRUSA members share their leads with all of our suppliers.

Cost: Approximately \$3,000 plus travel—includes booth space and registration.

FOR MORE INFORMATION CONTACT Rich Gilbert—410-767-6288; rgilbert@visitmaryland.org.

Marketing Target: International

Opportunity: Capital Region USA (CRUSA) programs.

Description: The Capital Region USA (CRUSA) is a tourism alliance comprised of and funded primarily by the Maryland Office of Tourism, the Virginia Tourism Corporation and Destination DC, with significant support from the Metropolitan Washington Airports Authority. CRUSA strives to increase visitation and economic impact to the Capital region from selected international markets by implementing innovative marketing programs and public/private sector partnerships.

Cost: Varies by marketing program—includes tradeshows, trade and press familiarization tours, media and sales missions, coop advertising opportunities, consumer shows, Web marketing programs and consumer promotions with tour operators.

FOR MORE INFORMATION CONTACT Matt Gaffney—302-226-0422, mgaffney@capitalregionusa.org or Kimberly Petersen—804-562-0168, kpetersen@capitalregionusa.org

Marketing Target: Amateur and Professional Sports

Opportunity: TEAM Maryland.

Description: Join the Statewide initiative to collectively market Maryland to the entire sports industry by creating a synergistic approach to promote all of Maryland as a sports destination. Being a partner in TEAM Maryland is encouraged to maximize your sports marketing opportunities.

Costs: \$5,000-\$20,000 (pricing is tier-based).





Marketing Target: Meeting Planners

Opportunity: Meetings and Conventions Trade Show Coops.

Description: Maryland purchases booth space in tradeshows that offer exposure to meeting planners. You can share in that booth space at a reduced cost. Potential shows include HSMAI's Affordable Meetings and Meetings Quest.

FOR MORE INFORMATION CONTACT Sandy Stilling—410-767-6270; sstilling@visitmaryland.org.

Marketing Target: Meeting & Incentive Planners

Opportunity: AIBTM—The America's Meetings and Events Exposition and America Meetings Week.

Description: Maryland will co-host a Marketplace Pavilion at this major appointment tradeshow. Opportunity to interface with 3000 domestic and international meetings and incentive professionals at Pavilion and events.

Benefits:

- » Scheduled appointments and presentations with Hosted Buyers.
- » Ability to meet with other trade visitors and schedule additional appointments.
- Tickets to the Hosted Buyers Reception and the Welcome Reception.
- Access to the Visit Baltimore VIP Customer Lounge.
- » Attendance at press conferences and distribution of press materials.
- » Pre- and post-educational tours.
- » Optional attendance at the PCMA Educational Conference and CIC's Hall of Leaders Gala.

Costs: 7,500



Maryland Tourism Development Board Roster

EXECUTIVE COMMITTEE

MR. GREGORY SHOCKLEY Chair Owner, Shenanigan's Irish Pub

MS. KATHLEEN CLOYD SHER Vice Chair—Attractions Deputy Director of External Affairs National Aquarium

MR. PAUL J. BALES Vice Chair—Food Service Owner, Culinary Concepts, LLC Crossing at Casey Jones Restaurant

MR. MICHAEL E. HAYNIE Vice Chair-Lodging

MR. CHRISTOPHER S. SCHARDT Vice Chair—Retail Senior General Manager General Growth Properties Harborplace, the Gallery at Harborplace, and Owings Mills Mall

MS. PEGGY MAHER Vice Chair—Transportation Vice President, Sales Veolia Transportation Services, Inc.

MR. DAVID MELOY Secretary/Treasurer President, Merit Hotel Group

MEMBERS-AT-LARGE

MS. CONNIE DELSIGNORE President and CEO Annapolis & Anne Arundel County CVB

MS. DEBORAH DODSON Director Talbot County Office of Tourism

MR. ADOLPH W. EBERSBERGER. JR. Insurance and Financial Specialist, Retired

MR. JOHN FIESELER **Executive Director** Tourism Council of Frederick County, Inc.

MR. JOHN JENKINS Vice President and Hotel Manager Gaylord National Resort & Convention Center

MR. SAMUEL PARKER, JR., AICP Chairman Prince George's County Planning Board

MR. KHALED SAID Marketing Research Analyst & VP Operations Northstar Hotel Management LLC

MR. VICTOR A. SULIN Attorney at Law, Retired

MR. MATTHEW M. TAYLOR **Executive Director** Adventure Sports Center International

MR. ANDREW L. VICK **Executive Director** Allegany Arts Council, Inc.

MS. LINDA WESTGATE General Manager Hilton Baltimore

LEGISLATIVE APPOINTEES

THE HONORABLE JOHN C. ASTLE Senator, Maryland District 30 Anne Arundel County

THE HONORABLE WENDELL R. BEITZEL Delegate, District 1A Garrett and Allegany Counties

THE HONORABLE JENNIE M. FOREHAND Senator, Maryland District 17 **Montgomery County**

THE HONORABLE NANCY JACOBS Senator, Maryland District 34 Cecil and Harford Counties

THE HONORABLE JAMES N. MATHIAS, JR. Delegate, District 38B Wicomico and Worcester Counties

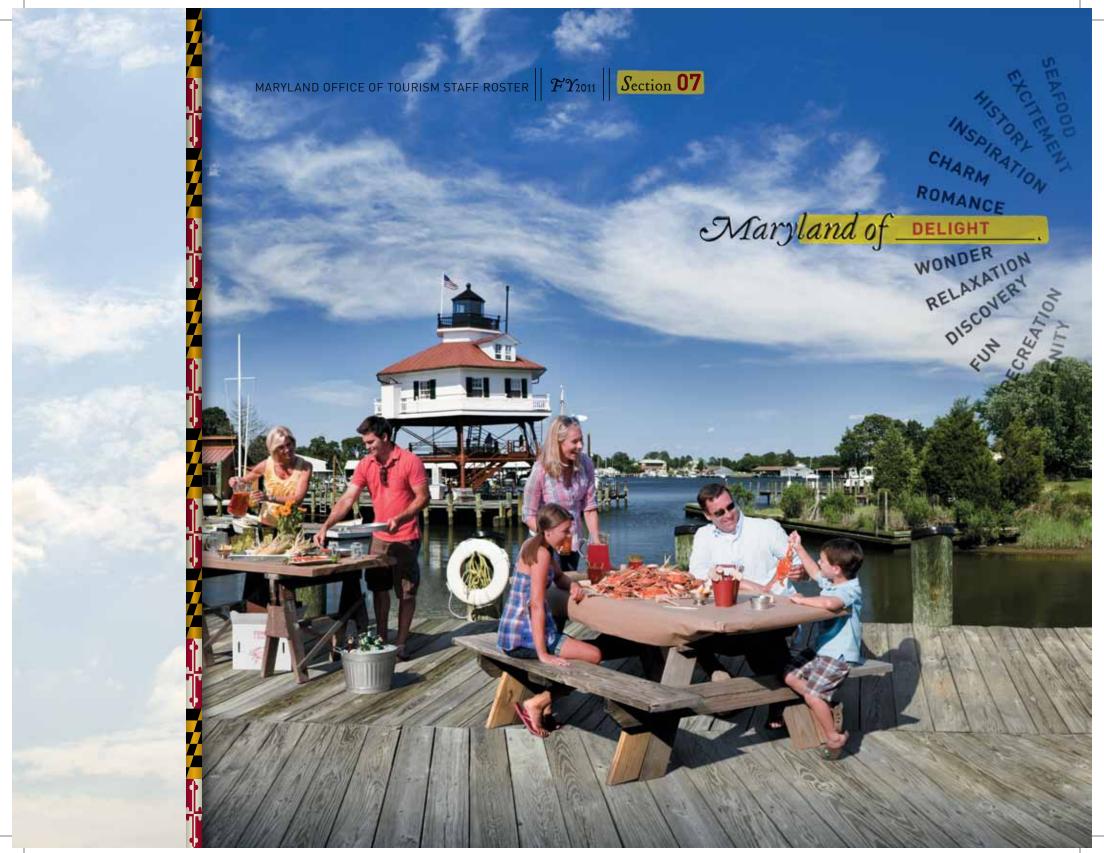
THE HONORABLE DAVID D. RUDOLPH Delegate, District 34B Cecil County

OTD

MS. MARGOT AMELIA **Executive Director**

MS. DENISE REED Board Liaison





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Maryland Office of Tourism Staff Roster

DIVISION OF TOURISM, FILM AND THE ARTS

401 E. Pratt Street, 14th Floor Baltimore, MD 21202 410-767-3400 877-209-5883 410-333-6643 (fax) www.ChooseMaryland.org

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TERRY HASSELTINE

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FAY SHORT Budget Officer 410-767-6326 fshort@ChooseMaryland.org

ASHLEY COTTRELL Sports Marketing Coordinator 410-767-1406 acottrell@ChooseMaryland.org

MARYLAND OFFICE OF TOURISM

Same address, phone and fax as above. www.visitmaryland.org

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DENISE REED Executive Assistant/MTDB Liaison 410-767-6293 dreed@visitmaryland.org

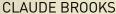
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LIZ FITZSIMMONS **Assistant Director** 410-767-6331 lfitzsimmons@visitmaryland.org

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CONNIE YINGLING

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PETER CENTO

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MICHELLE KEMPSKE

Call Center 410-767-6615 mkempske@visitmaryland.org JENNIFER JONES

Tourism Development Manager 410-767-6296 jjones@visitmaryland.org

ANNE KYLE

Product Development Manager 410-767-0696 akyle@visitmaryland.org

Travel Trade Sales

RICH GILBERT

Travel Trade Sales Manager 410-767-6288 rgilbert@visitmaryland.org

SANDY STILLING

Administrative Assistant 410-767-6270 sstilling@visitmaryland.org

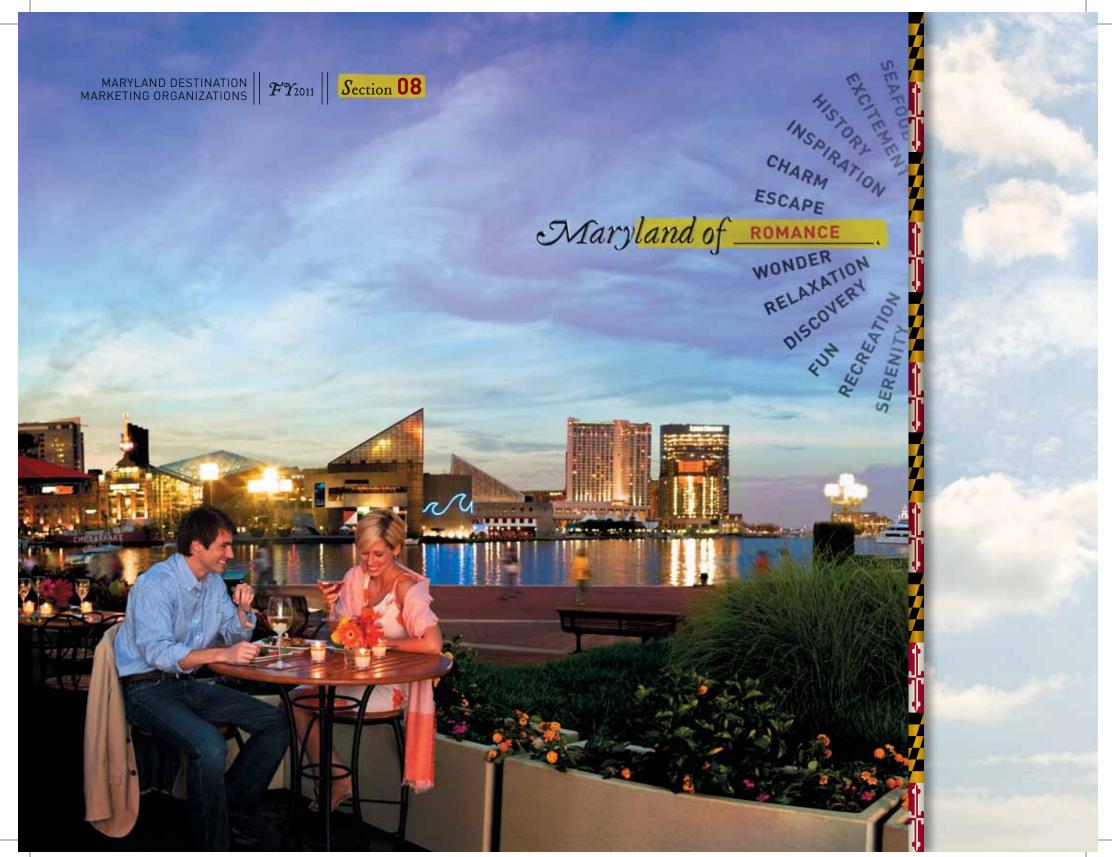
Welcome Centers

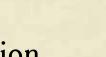
I-95 NORTH WELCOME CENTER 301-490-1333

I-95 SOUTH WELCOME CENTER 301-490-2444

I-70 EAST WELCOME CENTER 301-293-2526

I-70 WEST WELCOME CENTER 301-293-8435





Maryland Destination Marketing Organizations

ALLEGANY COUNTY

Allegany County Tourism
13 Canal Street, Rm 306
Cumberland, MD 21502
301-777-5138; 800-425-2067
Fax: 301-777-5137

Website: www.mdmountainside.com

ANNAPOLIS/ANNE ARUNDEL COUNTY

Annapolis & Anne Arundel County CVB 26 West Street Annapolis, MD 21401 410-280-0445; 888-302-2852 Fax: 410-263-9591 Website: www.visitannapolis.org

BALTIMORE CITY

Visit Baltimore 100 Light Street, 12th Floor Baltimore, MD 21202 410-659-7300 Fax: 410-659-7313 Website: www.baltimore.org

BALTIMORE COUNTY

Baltimore County Department of Economic Development Jenifer Bldg., 44 W. Chesapeake Avenue Towson, MD 21204 410-296-4886, Ext. 3; 800-570-2836 Fax: 410-296-8618

Fax: 410-290-0010

Website: www.visitbacomd.com

CALVERT COUNTY

Calvert County Department of Economic Development 175 Main Street Prince Frederick, MD 20678 410-535-4583; 800-331-9771 Fax: 410-535-4585

Website: www.ecalvert.com

CAROLINE COUNTY

Caroline County Office of Tourism 10219 River Landing Road Denton, MD 21629 410-479-2730 Fax: 410-479-5563

Website: www.tourcaroline.com

CARROLL COUNTY

Carroll County Visitor Center 210 E. Main Street Westminster, MD 21157 410-848-1388; 800-272-1933

Fax: 410-876-1560

Website: www.carrollcountytourism.org

CECIL COUNTY

Cecil County Tourism
Perryville Outlet Center
68 Heather Lane, Suite #43
Perryville, MD 21903-2554
410-996-6299; 800-CECIL-95
Fax: 866-466-7069

Website: www.SeeCecil.org

CHARLES COUNTY

Charles County Government
P.O. Box 2150; 200 Baltimore Street
La Plata, MD 20646
800-766-3386; 301-645-0558

Fax: 301-885-1341

Website: www.thenationsbackyard.com

DORCHESTER COUNTY

Dorchester County Tourism 2 Rose Hill Place Cambridge, MD 21613 410-228-1000 Fax: 410-221-6545

Website: www.tourdorchester.org

FREDERICK COUNTY

Tourism Council of Frederick County, Inc. 19 E. Church Street Frederick, MD 21701 301-600-2888; 800-999-3613 Fax: 301-600-4044

Fax: 301-600-4044

Website: www.fredericktourism.org

GARRETT COUNTY

Garrett County Chamber of Commerce 15 Visitors Center Drive McHenry, MD 21541 301-387-4386, Ext. 13 Fax: 301-387-2080

Website: www.visitdeepcreek.com

HARFORD COUNTY

Harford County Office of Tourism 220 S. Main Street Bel Air, MD 21014 410-638-3327; 888-544-4695 Visitor Info: 410-638-3059 Fax: 410-879-8043 Website: www.harfordmd.com

HOWARD COUNTY

Howard County Tourism & Promotion 8267 Main St., Side Entrance Ellicott City, MD 21043 410-313-1900; 800-288-8747 Fax: 410-313-1902

Website: www.VisitHowardCounty.com

KENT COUNTY

Kent County Office of Tourism and Economic Development 400 High Street, 2nd Floor Chestertown, MD 21620 410-778-0416 Fax: 410-778-2746

Website: www.kentcounty.com

MONTGOMERY COUNTY

CVB of Montgomery, MD, Inc. 111 Rockville Pike, Suite 800 Rockville, MD 20850 240-777-2060; 877-789-6904 Fax: 240-777-2065 Website: www.visitmontgomery.com

PRINCE GEORGE'S COUNTY

Prince George's County CVB 9200 Basil Court, Suite 101 Largo, MD 20774 301-925-8300 Fax: 301-925-2053 Website: www.visitprincegeorges.com

QUEEN ANNE'S COUNTY

Queen Anne's County Department of Economic Development, Agriculture & Tourism 425 Piney Narrows Road Chester, MD 21619 410-604-2100 Fax: 410-604-2101

Website: www.discoverqueenannes.com





ST. MARY'S COUNTY

St. Mary's County Department of Economic and **Community Development** P.O. Box 653; 23115 Leonard Hall Dr. Leonardtown, MD 20650 301-475-4200, x1403 Fax: 301-475-4414

Website: www.VisitStMarysMd.com

SOMERSET COUNTY

Somerset County Tourism P.O. Box 243; (Deliveries): 11440 Ocean Hwy. Princess Anne, MD 21853 410-651-2968; 800-521-9189 Fax: 410-651-3917

Website: www.visitsomerset.com

TALBOT COUNTY

Talbot County Office of Tourism 11 S. Harrison Street Easton, MD 21601 410-770-8000 Fax: 410-770-8057 Website: www.tourtalbot.org

WASHINGTON COUNTY

Hagerstown-Washington County CVB 16 Public Square Hagerstown, MD 21740 301-791-3246 Fax: 301-791-2601 Website: www.marylandmemories.com

WICOMICO COUNTY

Wicomico County CVB 8480 Ocean Highway Delmar, MD 21875 410-548-4914; 800-332-TOUR Fax: 410-341-4996

Website: www.wicomicotourism.org

WORCESTER COUNTY

Worcester County Tourism 104 West Market Street Snow Hill, MD 21863 410-632-3110; 800-852-0335 Fax: 410-632-3158

Website: www.visitworcester.org

WORCESTER COUNTY (OCEAN CITY)

Ocean City Tourism/Convention Center 4001 Coastal Highway Ocean City, MD 21842 410-723-8617; 800-626-2326

Fax: 410-289-0058

Website: www.ococean.com

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