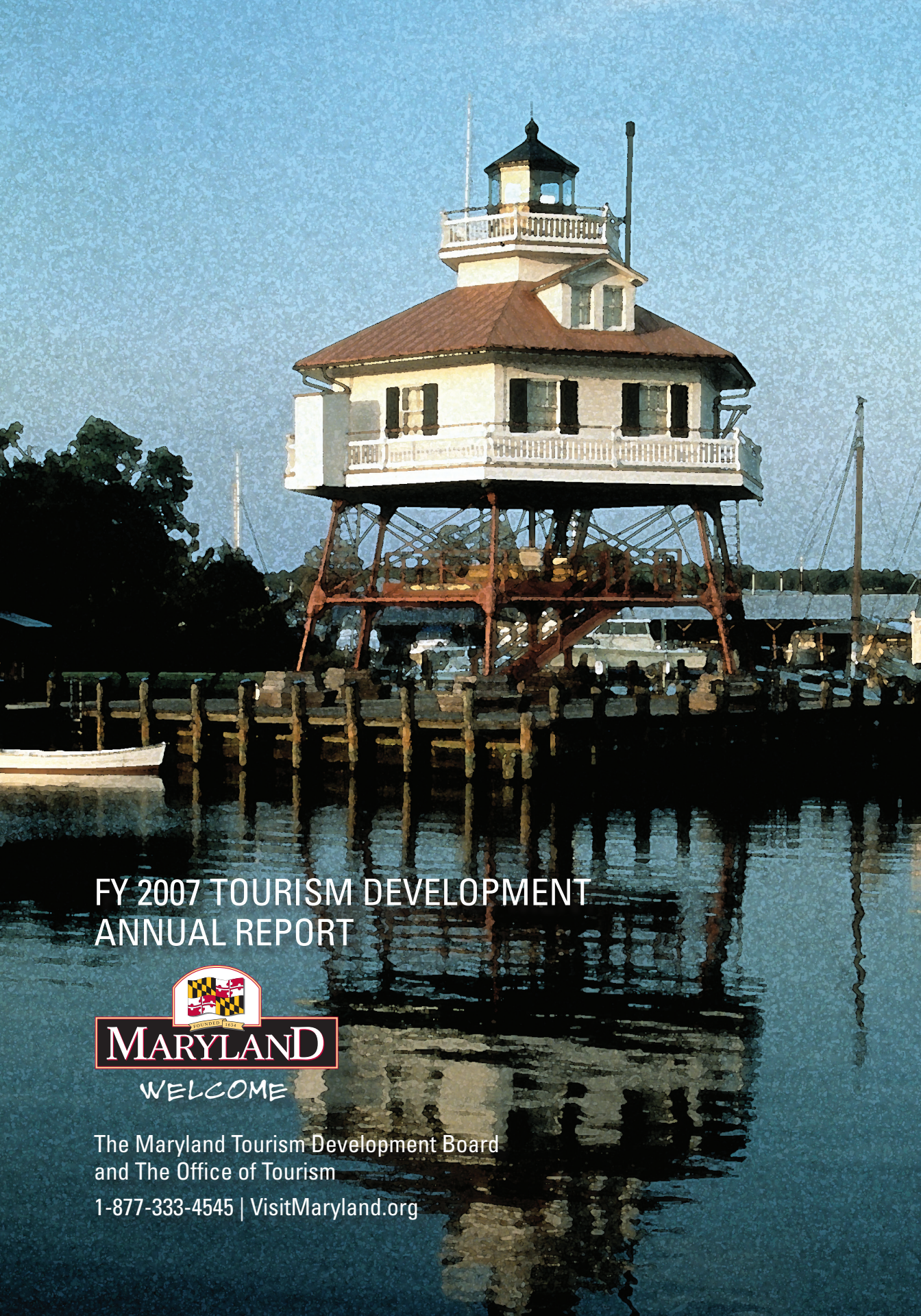




FY 2007 TOURISM DEVELOPMENT ANNUAL REPORT



The Maryland Tourism Development Board
and The Office of Tourism
1-877-333-4545 | VisitMaryland.org

Dear Tourism Partner:

From the family friendly seaside resort of Ocean City to the majestic mountains in Western Maryland, from exciting and cultural downtowns to charming and historic small towns, Maryland offers visitors and residents a truly wonderful vacation experience – one we want to invite more travelers to experience.

The Maryland Office of Tourism's Fiscal Year 2007 Annual Report demonstrates the strength of Maryland's tourism industry and its positive impact on the state's economy. I look to our visitor expenditures as a proactive approach to generate revenue to the state's general fund.



Tourism is a powerful economic force in Maryland. As the state's fourth largest employer, it represents \$3 billion in salaries for the more than 115,000 people who are directly employed in the industry.

In this report, you will learn that more than 28 million visitors came to Maryland in the last year and spent \$11 billion dollars at Maryland hotels, bed and breakfasts, campgrounds, shopping venues, attractions and restaurants. Traveler spending generated \$850 million in state and local tax revenues.

I look forward to strengthening and supporting this dynamic and powerful industry to create One Maryland where tourism continues to benefit our citizens and our business community, enhancing our quality of life.

Sincerely,

A handwritten signature in black ink, which appears to read "Martin O'Malley". The signature is fluid and stylized, with the first and last names being the most prominent.

Martin O'Malley
Governor





MISSION STATEMENT

The Maryland Office of Tourism's mission is to increase tourism expenditures to the state by providing residents and out-of-state visitors with information and services to ensure a positive trip experience.

The Maryland Office of Tourism Development's Annual Report, published by the Maryland Department of Business and Economic Development's Office of Tourism, is available free upon request.

Martin O'Malley, Governor

Department of Business and
Economic Development

David W. Edgerley, Secretary

Clarence T. Bishop, Deputy Secretary

Division of Tourism, Film and the Arts

Hannah Lee Byron, Assistant Secretary

Office of Tourism

Margot Amelia, Executive Director

217 E. Redwood Street

Baltimore, Maryland 21202

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www.visitmaryland.org



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EXECUTIVE SUMMARY

Office of Tourism

Fiscal Year 2007 Performance

The challenge with preparing an annual report is that it is like looking in the rearview mirror of a car – it is all behind you. However, the success of Fiscal Year 2007 bodes well for the future of tourism in Maryland.

Fiscal Year 2007 brought a new management team to the Maryland Office of Tourism. This organization is headed by Assistant Secretary Hannah Lee Byron, a seasoned tourism marketing professional. Assistant Secretary Byron, the Director of the Maryland Office of Tourism from 1999 – 2002, quickly organized a search committee to find an Executive Director that could analyze the current marketing environment and challenges for a state whose marketing budget is less than half that of its nearest competitors. Through an open and deliberate process, Margot Amelia, a destination marketing organization (DMO) representative from Baltimore City, was selected to lead the efforts of the Maryland Office of Tourism into the future.

The Fiscal Year 2007 accomplishments of the Maryland Office of Tourism are many and some highlights include:

- ❖ The O'Malley/Brown Transition Report recommended that the visitmaryland.org web site was in need of an upgrade. The team at the Maryland Office of Tourism had already begun working on this process and new staff was added to ensure that the new site would be world-class and expandable for the future.
- ❖ The public relations team continues to spread the word about Maryland's attractiveness as a travel destination to the local, national and international media. In Fiscal Year 2007, nearly \$7 million in travel-related publicity was generated for the state through our efforts.
- ❖ The Byways Map and Guide was produced through a collaborative process by the Maryland Office of Tourism, the State Highways Administration and the Department of Business and Economic Development's Office of Marketing, Advertising and Communications. The Byways Guide highlighted two other state-sponsored programs: the Maryland Heritage Areas and the Arts and Entertainment Districts. This publication has recently received one of the highest honors from the Northeast Economic Developers Association (NEDA).
- ❖ The momentum of our third-party marketing activities continues to grow. Once again, our travel missions have sold out as so many partners have clamored to climb aboard the bus and bring their destinations, attractions and accommodations to buyers. Many of the participants are repeat customers who have returned to their Maryland travel companies with contracts in their hands for future business.
- ❖ The team is working with the State Highway Administration to develop a tourism signage program that more easily promotes area tourism attractions and encourages the traveling public to discover the amazing variety of wonderful travel experiences across the state.

The challenges in moving forward are many: time-deprived consumers for whom vacations are but a dream; the softening of the housing market and the threat of a credit implosion; and the ever-increasing tourism marketing budgets of our competitors. However, the leadership at the Department of Business and Economic Development and the Maryland Office of Tourism are committed to analyzing the business environment and developing the best strategies to maximize the economic benefits tourism delivers to the state of Maryland.

TOURISM: FUELING MARYLAND'S ECONOMIC ENGINE

ECONOMIC IMPACT OF TRAVEL IN MARYLAND

Maryland Welcomes 28 Million Visitors in 2006

Maryland's latest data confirms that in 2006, Maryland broke the 28 million mark for person-trips taken to the state. While the average length of stay for all travelers in Maryland decreased to 1.4 nights in 2006, the total number of overnight trips increased from 12.7 million to 13.2 million. Day trips hovered just over 15 million, according to D.K. Shifflet & Associates, Ltd. *DIRECTIONS® Travel Intelligence System*SM.

Impact of Travel on Maryland's Economy

Maryland benefited from a 3.8 percent increase in total travelers, with households spending an average of \$305 per trip, or \$218 per day. The average trip included two people and nearly half of all visitors stayed overnight in Maryland in 2006 (D.K. Shifflet & Associates Ltd.). As more visitors spend more time in Maryland, they spend more money on lodging, transportation, amusement, and other amenities.

Travel Expenditures Linked to Higher Gross Domestic Product

Tourists and travelers spent \$10.7 billion in Maryland in 2005, equal to 4.4 percent of Maryland's total gross domestic product (\$244.5 billion, U.S. Department of Commerce, Bureau of Economic Analysis).

Higher Levels of Spending Reported in All Categories

Expenditures increased in every category tracked in the travel industry in Maryland, resulting in an overall travel expenditure increase of 6 percent from 2004 to 2005. Domestic spending increased 5.7 percent, while international expenditures increased 13.1 percent.

Expenditures (\$ millions)

Category	2003	2004	2005	% Change 2004 - 2005
Public Transportation	2,221.2	2,345.0	2,393.0	2.0
Auto Transportation	1,456.1	1,637.7	1,840.1	12.4
Lodging	1,617.2	1,760.6	1,904.6	8.2
Food Service	2,309.7	2,511.4	2,617.4	4.2
Entertainment & Recreation	685.4	702.1	728.7	3.8
General Retail Trade	722.7	777.7	805.4	3.6
Domestic Total	9,012.3	9,734.5	10,289.2	5.7
International	319.0	341.8	386.7	13.1
Totals	9,331.3	10,076.3	\$10,675.9	6.0

6

Definitions: *Travel*. The act of taking a "trip". ***Trip*.** A trip occurs, for the purpose of the model, every time one or more persons goes to a place 50 miles or more, each way, from home in one day, or is out-of-town one or more nights in paid accommodations, and returns to his/her origin. Specifically excluded from this definition are:

- (1) travel as a part of an operating crew on a train, plane, bus, truck or ship;
- (2) commuting to a place of work;
- (3) student trips to school or those taken while in school.

Note: Numbers are based on Calendar Year.

Source: Travel Industry Association of America. Most current data available.



Travel Expenditures Contribute to Increased Wages

Traveler-generated payroll reached \$3.0 billion dollars in 2005. Every dollar spent by domestic and international travelers produced 28 cents in wage and salary income for Maryland residents in 2005.

Payroll (in \$ millions)

Category	2003	2004	2005	% Change 2004 - 2005
Public Transportation	791.2	862.6	892.8	3.5
Auto Transportation	99.5	104.6	105.9	1.2
Lodging	597.3	602.0	644.2	7.0
Food Service	670.8	717.8	739.0	3.0
Entertainment & Recreation	304.4	326.1	353.9	8.5
General Retail Trade	104.4	111.2	111.5	0.3
Travel Planning	70.3	76.1	74.5	-1.0
International	101.3	106.7	117.4	10.1
Total	2739.2	2,907.1	3,040.0	4.6

Steady Travel Signifies Steady Employment

Maryland's travel employment has remained steady over the past three-year period, increasing slightly as the U.S. experiences steadily decreasing unemployment rates.

Direct Employment

Category	2003	2004	2005
Public Transportation	18,650	18,700	18,600
Auto Transportation	4,210	4,300	4,200
Lodging	18,770	19,000	19,200
Food Service	45,580	47,200	47,400
Entertainment & Recreation	13,670	14,300	14,500
General Retail Trade	5,130	5,300	5,300
Travel Planning	2,190	2,200	2,000
International	4,380	4,500	4,700
Totals	112,580	115,400	115,800

Traveler Expenditures Contribute to State and Local Taxes

Tax Revenues (\$ millions)

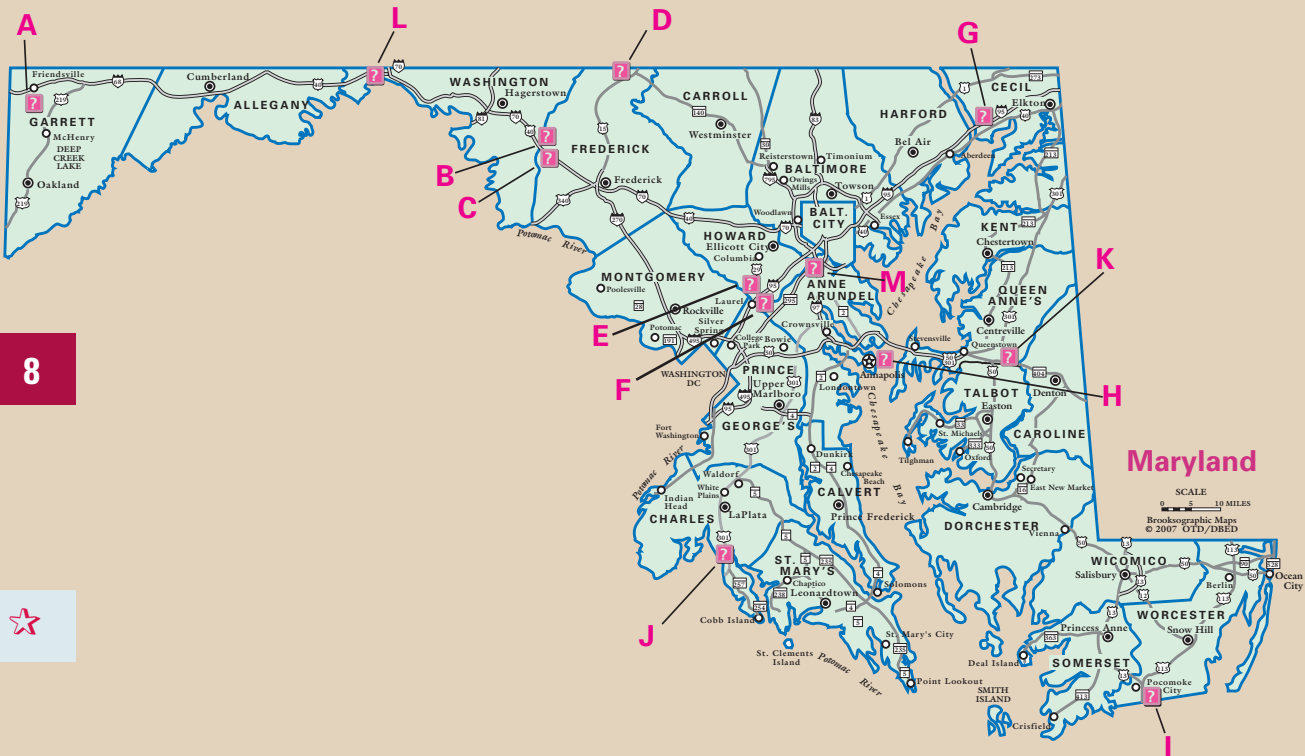
Category	2003	2004	2005	% Change 2004 - 2005
Federal	1,131.9	1,198.2	1,242.9	3.7
State	408.6	433.3	451.6	4.2
Local	354.3	379.8	398.2	4.9
Domestic Total	1,894.8	2,011.3	2,092.8	4.1
International	64.9	68.3	76.7	12.3
Total	1,959.7	2,079.6	2,169.6	4.3

Welcome Center Visitors

	FY05	FY06	FY07	Percent Change FY06-07
A. Youghiogheny	89,595	78,584	84,551	7.6%
B. I-70 West	77,902	77,252	81,894	6.0%
C. I-70 East	113,497	107,949	124,372	15.2%
D. Mason Dixon	73,276	69,580	87,540	25.8%
E. I-95 South	178,252	150,091	144,391	-3.8%
F. I-95 North	181,016	163,662	168,703	3.1%
G. Chesapeake House	266,971	257,465	238,377	-7.4%
H. State House	174,165	164,324	151,315	-7.9%
I. US 13	217,206	213,963	211,401	-1.2%
J. Crain Memorial	130,424	138,804	153,875	10.9%
K. Bay Country	86,948	78,571	67,336	-14.3%
L. Sideling Hill	124,122	112,455	101,398	-9.8%
M. BWI	363,989	387,734	435,266	12.3%
Total	2,077,363	2,000,434	2,050,419	2.5%

Welcome
Center staff
began seeing
visitation
volume rise in
FY 2007.

Note: Welcome Center visitation data is obtained by door counters and staff tallies.



Top 10 States Of Origin For Visitors To Maryland

Marylanders rank first in traveler trips taken in Maryland; second in advertising inquiries, following Pennsylvanians; and third in welcome center visitations, following Pennsylvanians and New Yorkers in this category. Other states that placed in all three categories: FL, NC, NJ, NY, PA, VA

2006 Top Three Designated Market Areas (DMA) of Origin

2006

Washington DC	24%
Baltimore	14%
Philadelphia	10%

2005

Washington DC	25%
Philadelphia	14%
Baltimore	14%

Many of Maryland’s visitors come from right across the state’s borders.

ADVERTISING INQUIRIES					
FY 05	Percent	FY 06	Percent	FY 07	Percent
Pennsylvania	10.7	New York	10.3	Pennsylvania	13.95
New York	10.4	Pennsylvania	10	New York	10.3
New Jersey	7.3	New Jersey	7.4	New Jersey	8.96
Virginia	5.1	Virginia	5.7	Virginia	5.25
Ohio	4.1	Ohio	4.6	North Carolina	4.55
California	3.8	North Carolina	3.9	Ohio	4.29
Texas	3.4	Texas	3.7	California	3.4
North Carolina	3.2	California	3.4	Texas	2.87
Florida	3	Florida	3.2	Florida	2.74
Illinois	2.7	Massachusetts	2.5	Illinois	2.35
Totals	53.7		54.7		58.6
Maryland	14.8	Maryland	14.7	Maryland	13.2
TOTAL MARYLAND VISITATION (Source: D.K. Shifflet & Associates, LTD)					
CY 04	Percent	CY 05	Percent	CY 06	Percent
Pennsylvania	13.7	Virginia	16.4	Pennsylvania	14.4
Virginia	13.0	Pennsylvania	16.0	Virginia	12.1
New York	6.7	New Jersey	6.8	New Jersey	6.8
New Jersey	4.4	New York	4.7	New York	3.3
Delaware	3.7	West Virginia	2.5	Massachusetts	3
Florida	3.6	North Carolina	2.4	North Carolina	3
North Carolina	2.9	Delaware	2.0	Delaware	2.9
California	2.9	Florida	1.9	Florida	2.3
West Virginia	2.4	Ohio	1.7	West Virginia	2
Ohio	2.3	Washington, D.C.	1.6	Washington, D.C.	2
Totals	55.6		56.0		51.8
Maryland	26.0	Maryland	31.0	Maryland	33.3
WELCOME CENTERS					
FY 05	Percent	FY 06	Percent	FY 07	Percent
Pennsylvania	14.9	Pennsylvania	14.6	Pennsylvania	14.2
New York	13	New York	13.6	New York	13.9
Virginia	10.4	Virginia	10.5	Virginia	11.4
New Jersey	8.9	New Jersey	7.9	New Jersey	8.3
Ohio	4.2	Ohio	4.3	Ohio	4.1
DC	4.1	DC	3.9	North Carolina	3.8
Florida	3.6	Florida	3.8	Florida	3.7
North Carolina	3.5	North Carolina	3.6	D.C.	3.1
West Virginia	2.5	West Virginia	2.6	West Virginia	2.8
Michigan	2	Michigan	2.0	Michigan	1.9
Totals	67.1		66.8		67.2
Maryland	12.7	Maryland	13.6	Maryland	13





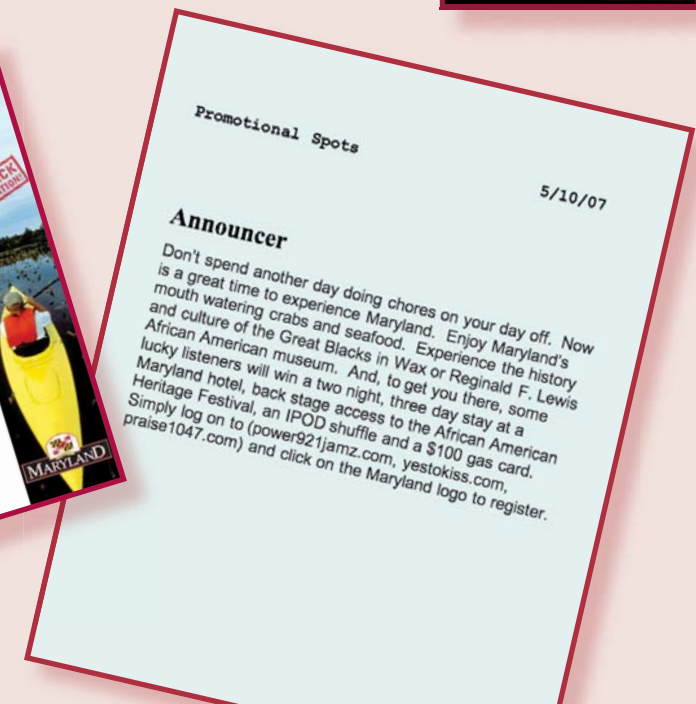
Return on Investment (ROI) of OTD's Advertising

Based on the most recent RESI conversion study, it is estimated that OTD's advertising was responsible for 294,476 trips in FY07. Using the average trip expenditure of \$305 from the most recent TIA report, OTD advertising generated almost \$90 million in tourism revenues. Using the ratios from TIA's economic impact model, this spending resulted in \$3,951,873 in state taxes and \$3,502,796 in local taxes, for a total of \$7,454,669.

OTD spent \$3,180,356 in advertising in FY07. The overall Return on Investment (ROI)* from advertising-generated tourism revenue is \$28.24 for every \$1 OTD spends. The overall ROI to the State of Maryland is \$2.34 in state and local taxes for every \$1 OTD spends on tourism promotion.

**ROI is not directly comparable to previous years due to changes in the ROI formula.*

OTD
generated
more than a
half-million
inquiries from
its advertising.



COUNTY GRANT AND TAX FACT SHEET FY 07

County	Hotel/ Motel Tax Revenue *				Admissions & Amusement Tax				Total FY 07 Hotel/ Motel & AA Tax Revenue	Total Local Tourism Tax Revenue * * *	County Budget FY 07	County Grant Allocations FY 07
	FY 07 Rate	FY 06 Tax	FY 07 Tax	Percent Change	FY 07 Rate	FY 06 Tax	FY 07 Tax	Percent Change				
Allegany	8.0%	\$855,351	\$917,369	7.3%	7.5%	\$224,259	\$237,938	6.1%	\$1,155,307	\$3,060,000	\$512,103	\$36,943
Anne Arundel	7.0%	\$14,566,332	\$14,587,109	0.1%	10.0%	\$7,706,178	\$8,165,915	6.0%	\$22,753,024	\$73,940,000	\$1,218,939	\$56,525
Baltimore City	7.5%	\$20,787,548	\$20,556,000	-1.1%	10.0%	\$8,746,201	\$9,394,619	7.4%	\$29,950,619	\$51,500,000	\$9,916,490	\$187,500
Baltimore County	10.0%	\$8,406,864	\$8,884,740	5.7%	10.0%	\$6,850,725	\$7,132,121	27.7%	\$16,016,861	\$30,060,000	\$199,000	\$10,000
Calvert	5.0%	\$519,919	\$467,608	-10.1%	1.0%	\$608,013	\$536,423	-11.8%	\$1,004,031	\$5,010,000	\$489,100	\$39,523
Caroline	5.0%	\$35,998	\$37,283	3.6%	0.0%	\$5,569	\$9,133	64.0%	\$46,416	\$230,000	\$101,000	\$14,757
Carroll	5.0%	\$191,117	\$321,675	68.3%	10.0%	\$757,014	\$794,979	5.0%	\$1,116,654	\$2,490,000	\$288,400	\$23,756
Cecil	5.0%	\$278,490	\$339,634	22.0%	6.0%	\$347,751	\$332,265	-4.5%	\$671,899	\$7,820,000	\$187,000	\$39,419
Charles	5.0%	\$822,751	\$979,419	19.0%	10.0%	\$800,729	\$706,864	-11.7%	\$1,686,283	\$4,200,000	\$304,000	\$62,321
Dorchester	5.0%	\$229,439	\$246,046	7.2%	0.5%	\$122,319	\$123,647	1.1%	\$369,693	\$2,090,000	\$396,082	\$51,959
Frederick	3.0%	\$1,053,719	\$1,122,001	6.5%	5.0%	\$1,427,252	\$1,460,968	2.4%	\$2,582,969	\$5,280,000	\$1,420,334	\$148,527
Garrett	5.0%	\$1,271,653	\$1,506,923	18.5%	4.5%	\$599,983	\$593,904	-1.0%	\$2,100,827	\$9,080,000	\$1,149,172	\$43,333
Harford	0.0%	\$0	\$0	0.0%	5.0%	\$856,210	\$750,379	-12.4%	\$750,379	\$5,460,000	\$188,000	\$12,558
Howard	5.0%	\$3,295,797	\$3,523,314	6.9%	7.5%	\$1,952,808	\$2,029,255	3.9%	\$5,552,569	\$16,040,000	\$571,869	\$70,337
Kent	5.0%	\$212,896	\$212,896	0.0%	4.5%	\$65,039	\$62,559	-3.8%	\$275,455	\$2,420,000	\$285,602	\$54,186
Montgomery	7.0%	\$15,869,779	\$17,476,723	10.1%	7.0%	\$4,534,413	\$4,381,488	-3.4%	\$21,858,211	\$51,010,000	\$798,400	\$64,733
Prince George's	5.0%	\$6,880,743	\$7,034,199	2.2%	10.0%	\$15,427,338	\$12,866,282	-16.6%	\$19,900,481	\$31,930,000	\$902,603	\$70,785
Queen Anne's	5.0%	\$480,819	\$510,936	6.3%	5.0%	\$267,101	\$231,152	-13.5%	\$742,088	\$2,910,000	\$261,805	\$26,712
St Mary's	5.0%	\$552,163	\$570,855	3.4%	2.0%	\$124,220	\$119,686	-3.6%	\$690,541	\$3,680,000	\$408,213	\$59,629
Somerset	5.0%	\$80,633	\$68,275	-15.3%	4.0%	\$28,355	\$24,155	-14.8%	\$92,430	\$1,060,000	\$300,170	\$14,272
Talbot	4.0%	\$975,316	\$1,090,000	11.8%	5.0%	\$119,168	\$106,793	-10.4%	\$1,196,793	\$5,490,000	\$475,833	\$89,840
Washington	6.0%	\$1,501,838	\$1,588,278	5.8%	5.0%	\$600,920	\$578,438	-3.7%	\$2,166,716	\$5,500,000	\$899,950	\$63,224
Wicomico	6.0%	\$1,043,303	\$1,137,922	9.1%	6.0%	\$531,766	\$535,354	0.7%	\$1,673,276	\$5,660,000	\$769,000	\$35,510
Worcester	4.0%	\$456,957	\$496,468	8.6%	3.0%	\$602,616	\$647,979	7.5%	\$1,144,447	* * * \$72,330,000	\$339,951	\$39,200
Ocean City	4.0%	\$9,752,224	\$10,345,545	6.1%	3.0%	\$1,208,606	\$1,238,744	2.5%	\$11,584,289	Included Above	\$2,166,898	\$187,500
Maryland Stadium Authority		Not Applicable			8.0%	\$9,031,586	\$9,133,326	1.1%	\$9,133,326	Not Applicable		
TOTAL		\$90,121,650	\$94,021,218	4.3%		\$63,546,139	\$62,194,366	-2.1%	\$156,215,584	\$398,250,000	\$24,549,914	\$1,503,049

The State of Maryland collected more than \$62 million in admissions and amusement taxes in FY 2007. According to the latest figures available, FY 2007 hotel and motel tax collections are up 4.3 percent and total more than \$94 million.

* Figures for FY 07 hotel/motel tax revenue are unaudited/preliminary.

* * TIA Calendar Year 2005 estimates are the latest available.

* * * Includes Ocean City

Sources: Admission and Amusement Taxes - Maryland Comptroller of the Treasury,
Hotel and Motel Tax - Maryland county budget offices,
Total Tourism Tax Revenue - Travel Industry Association of America

In FY 07, OTD and the Maryland Tourism Development Board invested \$1.5 million to support the Destination Marketing Organizations (DMOs) through a matching grant program. The grants are used for marketing and advertising efforts to promote Maryland as a world-class travel destination.

The grants are efficiently leveraged by the DMOs and generate nearly \$5 for every dollar granted.

GENERATING CONSUMER INTEREST

FY 07 DOMESTIC ADVERTISING: Activity and Response Volume

Electronic Media

	Total Leads	Total Cost	Cost Per Lead
INTERNET			
Travelocity (July, 2006-June, 30, 2007)		\$100,000	
Fall: Advertising.com, New York Times, Undertone Networks, History Channel, AETV, Soul of America, Food Network, Yahoo, Travelocity, Value Click, Google		\$238,000	
Spring: New York Times, ValueClick, Search/Google, Advertising.com, Undertone Networks, Tribal Fusion		\$265,830	
Total Internet	423,234	\$603,830	\$1.43
BROADCAST			
Cable TV			
Fall			
Fall 2006 African American TV		\$60,000	
Philadelphia			
Pittsburgh			
Fall 2006 Spot TV		\$335,000	
Philadelphia			
Pittsburgh			
Harrisburg			
African American TV/Cable Media		\$4,920	
Richmond			
Spring			
Spring '07 Broadcast Net Cable		\$643,467	
A&E			
History Channel			
HGTV			
Total Cable TV	9,669	\$1,043,387	\$107.91
Radio			
Fall			
2006 WBAL Radio (July-October, 2006)		\$81,125	
Spring			
Spring FY'07 AA Radio Media		\$150,000	
Philadelphia	18,557		
Richmond	12,249		
Total Radio	30,806	\$231,125	\$7.50
Total Broadcast	40,475	\$1,274,512	\$31.49
TOTAL INTERNET AND TOTAL BROADCAST	463,709	\$1,878,342	\$4.05

Where Do Visitors Get Information About Maryland's Destinations?

More Than One Million Web Visitors

1,187,935 unique web users visited our site, www.visitmaryland.org, in FY 2007, an 8.8 % increase in visitors over FY 2006.

	FY 2006	FY 2007
Unique web visitors	1,091,580	1,187,935

FY 07 DOMESTIC ADVERTISING: Activity and Response Volume

Consumer Print Advertising

Magazine	Total Leads	Total Ad Buy	Cost Per Lead
A&E Brochure	10		
AAA Going Places	23		
AAA Guide Book	553		
AAA Touch	38	\$4,568	\$120.21
AAA World	1453	\$40,809	\$28.09
AARP	3869	\$12,461	\$3.22
African-American Brochure	95		
American Legacy	1005	\$29,132	\$28.99
American Legacy Woman	35	\$11,500	\$328.57
Arrive	692	\$32,736	\$47.31
Audubon (co-op w/ Collinson)	2036	\$20,000	\$9.82
Budget Travel	16	\$17,193	\$1,074.56
Car and Travel	1710	\$23,307	\$13.63
Civil War Traveler	4254	\$5,200	\$1.22
Coastal Living	1483	\$63,557	\$42.86
Cooking Light	1295	\$63,460	\$49.00
Destination MD Guide Trip Planner	1935		
Essence		\$22,870	
Golf Magazine/Digest	65	\$15,000	\$230.77
Gourmet	35		
Great Vacations Getaways	6937	\$6,025	\$0.87
Harrisburg Magazine	490	\$14,216	\$29.01
Heart & Soul	4	\$16,039	\$4,009.75
Heritage Area Map	14		
Marine Trade Association	24		
Maryland Golf Guide Brochure	65		
Maryland Life	40	\$22,470	\$561.75
Maryland Million/ Preakness Program Ad Book	54		
MD Vacation Planner	92		

OTD distributed more than 550,000 state and tourism collateral in response to its advertising.

Magazine	Total Leads	Total Ad Buy	Cost Per Lead
Meredith Publications	19918	\$352,410	\$17.69
MNI-Home Network	1	\$17,542	\$17,542.00
NAACP Ad Program Book/ Multicultural	8		
National/Regional/ Cmpgrnd/Dir	29		
Natural History	540	\$11,835	\$21.92
New York Times Magazine	291	\$16,748	\$57.55
North East Golf Market Magazine	75		
Pathfinders	6	\$8,415	\$1,402.50
People Magazine	3203		
PGA Tour State Farm Classic	10		
Philadelphia Magazine	902	\$82,664	\$91.65
Pittsburgh Magazine	475	\$29,040	\$61.14
Popular Photography	29		
Preservation	1485	\$48,989	\$32.99
Sandy Black Newspaper	10	\$1,176	\$117.65
Senior PGA Tour	10		
Southern Living	5433	\$133,499	\$24.57
Traditional Home	59		
Trailer Life	57		
Travel 50 & Beyond	1747	\$2,140	\$1.22
TravelInformation (AAA/ Rand McNally)	11688	\$12,200	\$1.04
USA Weekend	3222	\$89,526	\$27.79
Vacation Values Newspaper (Collinson)	10577	\$26,670	\$2.52
Washington Golf Monthly	170		
Woman's Day (co-op)	287		
(Miscellaneous/ Deactivated Lines)	711		
COE Insertions		\$48,616	
Total Print	89,818	\$1,302,014	\$14.50

Summary Table

	Total Cost	Leads	CPL
Total Print	\$1,302,014	89,818	\$14.50
Total Internet	\$603,830	423,234	\$1.43
Total Broadcast	\$1,274,512	40,475	\$31.49
FY'07 Total	\$3,180,356	553,527	\$5.75



MARYLAND VISITOR PROFILE 2006

Did you know?

- Travelers who stay overnight in Maryland stay on average for two nights.
- The number one activity for Maryland visitors in 2006 was dining (37%), followed by shopping (24%), sightseeing (17%), entertainment (17%), and going to the beach or waterfront (7%).

Traveler Profile	Maryland		National	
	2005	2006	2005	2006
Person-Trips	27,780,000	28,280,000	1,992,440,000	2,000,550,000
Percent of National Total	1.4%	1.4%		
Average Travel Party Size	1.8	2.1	1.9	2.2
Average Duration of all trips (nights)	1.7	1.4	1.7	1.7
Avg Trip Expenditures	\$353	\$305	\$361	\$370
Avg HH Income	\$79,201	\$82,780	\$68,891	\$69,090
Percent of Trips with Children	25%	30%	22%	35%

A higher percentage of travelers to Maryland dine; shop; sightsee; visit the beaches and museums; attend festivals and craft fairs; look at real estate; and participate in adventure sports than the national average.

Trip Profile	Maryland	National
Activities (mutiple responses - sum of percentage will exceed 100)		
Dining	37.3%	31.2%
Shopping	24.3%	23.2%
Entertainment	16.5%	18.7%
Touring/Sightseeing	16.9%	16.1%
Beach/Waterfront	7.3%	5.5%
Night Life	5.3%	7.0%
Museum, Art Exhibit	5.1%	4.1%
Watch Sports Events	3.3%	4.1%
Visit Historic Site	4.1%	4.4%
Festival, Craft Fair	7.4%	4.6%
Group Tour	2.2%	2.5%
Boat/Sail	1.2%	1.5%
National/State Park	3.6%	4.5%
Look at real estate	2.2%	1.7%
Theme/Amusement Park	3.4%	4.5%
Concert, Play, Dance	3.7%	4.4%
Boat/Car/Antique Show	0.8%	1.5%
Nature/Culture	1.7%	2.9%
Other Adventure Sports	2.3%	2.0%
Hunt, Fish	1.3%	3.1%
Gamble	0.7%	6.5%
Play Golf	1.0%	1.6%
Hike, Bike	0.7%	2.6%
Snow ski, Snow Board	0.4%	0.8%
Camping	0.6%	1.5%
No activity mentioned	34.1%	34.4%

Households surveyed are selected to be representative of the U.S. household population to determine specific details about U.S. travel behavior. Note: Estimates are based on Calendar Year

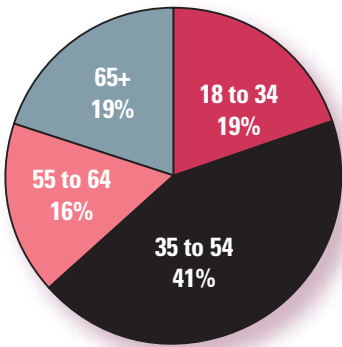
Source: D.K. Shifflet & Associates, Ltd.
DIRECTIONS® Travel Intelligence SystemSM



MARYLAND VISITOR PROFILE

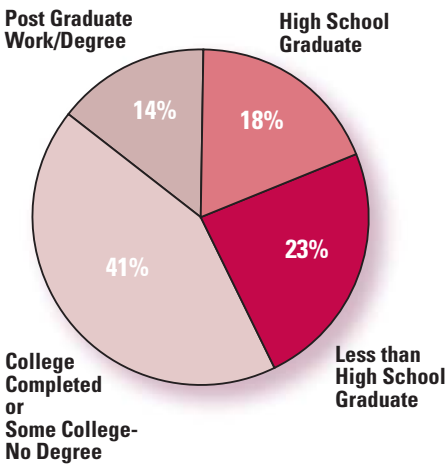
- Heads of households of Maryland travelers are 50 years old on average.

Age of Head of Household



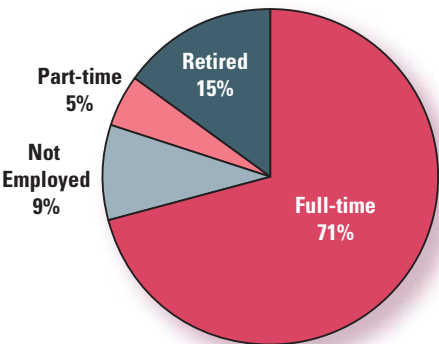
- Heads of households of travelers to Maryland are well-educated, with 41 percent having completed college, compared to the national average of 37 percent. Eighteen (18) percent of heads of households have done post-graduate work, compared to the national average of 16 percent.

Education of Household



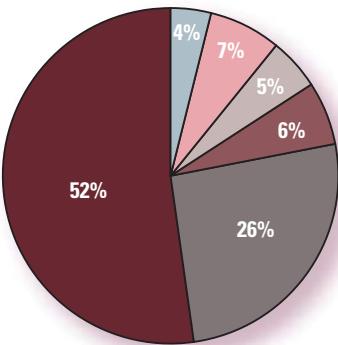
- Seventy-one (71) percent of heads of households of Maryland travelers are employed full-time, while 15 percent are retired. Almost one-third (30 percent) are employed in managerial and professional occupations.

Employment Status of Head of Household



- Fifty-two (52) percent of Maryland travelers report a household income of \$75,000 or more. The average annual household income of the Maryland traveler is \$82,780, compared to an average of \$69,090 for U.S. travelers.

Annual Household Income



52%	\$75,000 and more
26%	\$50,000 to \$74,999
6%	\$40,000 to \$49,555
5%	\$30,000 to \$39,000
7%	\$20,000 to \$29,000
4%	Less than \$25,000

- In 2006, 68 percent of travelers to Maryland were married and 30 percent had at least one child living in the household.



TRAVEL TRENDS

Trip Profile and Top Two Destination Fact Sheet

- Seventy one (71) percent of Maryland visitors traveled for pleasure; another 29 percent traveled to the state for business.
- The majority of overnight visitors to Maryland stayed in paid accommodations including hotel, motels, and bed and breakfasts.

Trip Profile	Maryland (% of travelers) 2006	National (% of travelers) 2006
Primary Purpose of Trip		
Leisure	70.8	74.1
Business	29.2	25.9

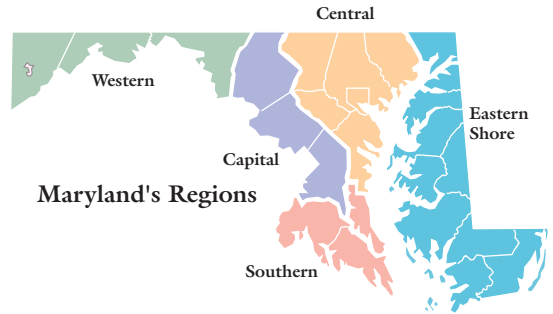
- Car or truck is the primary transportation mode for nearly nine out of 10 trips to Maryland; while almost one out of 10 (8 percent) travel by air.

Method of Travel	
Auto/ Truck	88.4
Rental Car	6.0
Camper/ RV	0.6
Airplane	7.8
Bus	0.8
Train	0.6
Ship/ Boat	0.1
Day Trip	50.0
Overnight Trip	50.0

Overnight Lodging	Maryland (% of travelers) 2006	National (% of travelers) 2006
Paid Accommodations*	53.6	50.9
Private Home	36.4	33.6
RV/ Tent	2.3	4.3
Timeshare	0.2	1.8
My 2nd home/condo/apt	1.7	1.6
Ship/Cruise	0.4	0.9
Other	5.3	6.9

* Include hotel/motel, resort, all suite hotels, and bed & breakfasts.

Maryland Regions Visited	Number of Trips
Central Region	14,237,485
Eastern Shore	6,698,822
Capital Region	4,909,641
Western Maryland	1,758,659
Southern Maryland	675,393
Total	28,280,000



Maryland's 2006 Top Two Destinations Fact Sheet		
	Baltimore City	Ocean City
Person Trips	7,607,320	3,846,080
Percent of Maryland Trips	26.9%	13.6%
Average Travel Party Size	1.8	2.8
Average Trip Length	1.3	3.2
Average Trip Expenditure per Household	\$312.30	\$699.75
Day Trips	4,092,738	873,060
Percent of Total Person Trips	53.8%	22.7%
Top 3 DMAs of Origin	Washington, DC Philadelphia Harrisburg-Lancaster-Lebanon-York, PA	Baltimore Washington, DC Philadelphia
Top 5 Activities	Dining Entertainment Shopping Touring/Sightseeing Museum/Art Exhibit	Beach/Waterfront Dining Shopping Entertainment Touring/Sightseeing





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The work of the Office of Tourism is guided and supported by hospitality industry leadership under an appointed board of executives representing destinations, lodging, retail, transportation, food service and attractions, and six members of Maryland's General Assembly.

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Garrett and Allegany counties

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Montgomery County

The Honorable Nancy Jacobs

Senator, Maryland District 34
Cecil and Harford counties

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Maryland House of Delegates
District 38 B
Wicomico and Worcester counties

** List as of November 2007*



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