

2008

MARYLAND TOURISM

Fast Facts



Fast Facts 2008

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Maryland Tourism Development Board Chairman's Message

Dear Tourism Industry Partners:

As someone who has been involved in the Maryland tourism industry for nearly 20 years, I know first hand the economic impact visitors deliver to our great State. Many of my employees have put their children through college, bought homes and paid taxes with the wages that they have earned. Hotel development has generated jobs in the construction industry and has kept florists, dry cleaners and food purveyors, among others, in business.

Tourism generated more than \$11.4 billion in visitor spending in 2006. This spending percolates throughout the State's economy from the obvious sources such as hotels and restaurants but also to the car dealers that supply vehicles to those businesses and to countless other companies that benefit from travel industry business operators.

Equally important is the tax revenue that our visitors generate for State and local government. The \$895 million in State and local taxes produced by visitors is used to help pay for much-needed services, such as education, transportation and public safety. Did you know that Maryland households would pay an average of \$420 more in State and local taxes or face cuts in programs or services without the spending of our visitors?

One of the challenges that our industry faces is increased competition for the travel and leisure dollar. Maryland's tourism budget is ranked 23rd in the nation at \$11.7 million while the national average is \$15 million. Moreover, our budget has remained stagnant in contrast to the national average, which has been steadily increasing since 2004.

It is vitally important to protect our investment while devising a strategy to grow the funds that are needed to invest in the promotion of the State as a travel destination. I look forward to working with the Maryland Tourism Development Board and the industry to maintain and enhance the marketing of Maryland as a world-class destination.

Sincerely,

David Meloy, Chairman
Maryland Tourism Development Board
President, Merit Hotel Group

Maryland Tourism Development Board

Executive Committee

David Meloy, Chair

President, Merit Hotel Group

Kathleen Cloyd Sher, Vice Chair – Attractions

Deputy Director of External Affairs,

National Aquarium in Baltimore

Sergio A. Vitale, Vice Chair – Food Service

Owner, Aldo's Ristorante Italiano and CIBO Bar and Grille

Michael E. Haynie, Vice Chair – Lodging

Vice President & Managing Director, Tremont Suite Hotels

Peggy Maher, Vice Chair – Transportation

Vice President, Sales, Veolia Transportation

Alice Torriente, Secretary/Treasurer

Owner, African American Tours

Members At-Large

Connie M. Del Signore

President and CEO,
Annapolis and Anne Arundel
Conference and Visitors
Bureau

Kelly R. Groff

Executive Director,
Conference and Visitors
Bureau of Montgomery
County, MD, Inc.

Deborah L. Dodson

Director, Talbot County
Office of Tourism

Gary Jobson

Jobson Sailing, Inc./ESPN
Commentator

Terry W. Prather

Park President, Six Flags
America

Bill Ripken

Co-owner/Executive Vice
President, Ripken Baseball

Khaled Said

Marketing Research Analyst,
Tanis Hotel Management
Company

Sheldon Suga

Senior Vice President and
General Manager, Gaylord
National Resort and
Convention Center

Andrew L. Vick

Executive Director, Allegany
Arts Council

Cynthia Wolf

Executive Chef/Owner,
Charleston Restaurant Group

Legislative Appointees

The Honorable John Astle

Senator, Maryland District 30, Anne Arundel County

The Honorable Wendell R. Beitzel

Delegate, District 1A, Garrett & Allegany counties

The Honorable Anne Marie Doory

Delegate, District 34, Baltimore City

The Honorable Jennie M. Forehand

Senator, Maryland District 17, Montgomery County

The Honorable Nancy Jacobs

Senator, District 34, Cecil and Harford counties

The Honorable James N. Mathias

Delegate, District 38 B, Wicomico and Worcester counties

The Executive Directors Council to the Maryland Tourism Development Board

The Executive Directors Council represents the leadership of those associations that contribute to Maryland's tourism-related economy.

- Community Arts Alliance of Maryland
- Marine Trades Association of Maryland
- Maryland Association of Campgrounds
- Maryland Association of Destination Marketing Associations
- Maryland Association of History Museums
- Maryland Bed & Breakfast Association
- Maryland Coalition of Heritage Areas
- Maryland Hotel & Lodging Association
- Maryland Motorcoach Association
- Maryland Retailers Association
- Maryland State Licensed Beverage Association
- Maryland Tourism Council
- Maryland Wineries Association
- Restaurant Association of Maryland
- WMDA Service Station & Automotive Repair Association



Office of Tourism Development

The Maryland Office of Tourism Development is a unit of the Division of Tourism, Film and the Arts within the Maryland Department of Business & Economic Development. Cooperative offices in the Division consist of the Maryland Film Office and the Maryland State Arts Council.

Our Mission The mission of the Maryland Office of Tourism Development is to increase tourism expenditures to the State by: promoting Maryland's attractions, accommodations and visitor services; providing resident and out-of-state visitors with information and services to ensure a positive trip experience; and positioning Maryland as a competitive tourism destination worldwide, in order to deliver revenue benefits for the State and its citizens.

Our Structure The work of the Office of Tourism Development is guided and supported by the Maryland Tourism Development Board, which is comprised of hospitality industry leadership under a gubernatorially and legislatively appointed board of executives representing attractions, destinations, food service, lodging, retail and transportation, as well as six members of the General Assembly. By General Assembly authority, the Board has broad policy powers to guide the direction of all activities necessary to develop and market the State as a world-class travel destination.

Maryland Office of Tourism Development

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410-767-3400 | 410-333-6643 (Fax)

info@visitmaryland.org

www.visitmaryland.org

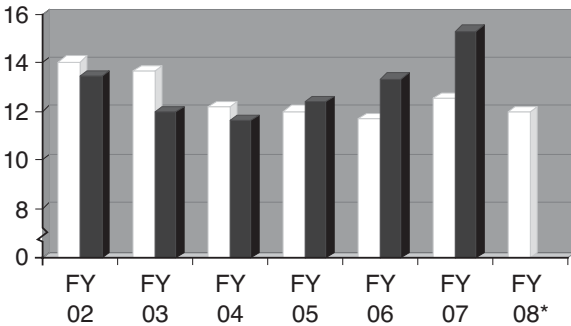
1-800-543-1036 (Consumer travel information)

Maryland Tourism Budget Trails National Average

Maryland’s tourism budget in FY 2008 is \$11.7 million, a decrease from \$12.6 million in FY 2007. While Maryland exceeded the national average for tourism budgets in the beginning of the millennium, the chart below shows that Maryland’s budget for tourism has remained at approximately \$12 million for the last four years. This contrasts with the national average, which has steadily increased since FY 2004 to more than \$15 million in FY 2007.

The Travel Industry Association of America ranked Maryland’s tourism budget 23rd of all estimated tourism budgets in FY 2007.

Maryland Tourism Budget vs. Average U.S. State & Territory Tourism Budgets



Maryland
 U.S.
 In millions of U.S. dollars

**Estimated FY 08 Maryland tourism budget available. Estimated FY 08 U.S. average not available. Source: Survey of U.S. State and Territory Tourism Office Budgets.*

Tourism is Economic Development

Visitor spending in Maryland helps keep residents employed, provides a vibrant quality of life for our citizens and helps pay for much-needed services, such as education, public safety and transportation.

- Tourism generated more than \$11.4 billion in expenditures from domestic and international visitors in 2006, up 7.1 percent from 2005.
 - This represents 5.2 percent of the Maryland Gross State Product.
 - Maryland tourism generated an average of \$31.3 million a day in tourist expenditures from lodging, meals, gasoline, shopping, and other services.
- Tourism directly supported more than 116,000 jobs and more than \$3.1 billion in payroll in 2006.
 - This represents 4.5 percent of total non-agricultural employment in Maryland.
 - Without these tourism jobs, the unemployment rate would climb to 7.7 percent from 3.9 percent.
- Tourism generated \$895 million in State and local tax revenue in 2006, an increase of 5.4 percent from 2005.
 - Maryland households would pay an average of \$420 more in State and local taxes each year without the tax revenues generated by the travel and tourism industry or face cuts in programs and services.

The Maryland Office of Tourism Development is committed to increasing visitor spending to the State of Maryland. Every dollar OTD spends advertising Maryland as a world-class travel destination delivers:

- A \$28.24 return on investment to Maryland's economy.
- A \$2.34 return on investment in State and local taxes.

Maryland Visitor Profile 2006

A visitor is someone who traveled 50 miles or more from home

- Visitors to Maryland: More than 28 million
- Average trip spending: \$305
- Primary purpose of trip: 71 percent leisure, 29 percent business
- Average length of stay: 1.4 nights
- Average travel party size: Two people (30 percent of trips include children)
- Average household income was \$82,780 (Almost 20 percent higher than the national average)

How our Visitors get to Maryland:

- More than 88 percent travel to Maryland in their own car or truck while almost 8 percent came by air.

What our Visitors do in Maryland:

- The number one activity for Maryland visitors was dining (37 percent), followed by shopping (24 percent), sightseeing (17 percent), entertainment (17 percent) and going to the beach or waterfront (7 percent).
- More than 40 percent of Maryland travelers visit either Baltimore or Ocean City.

Where our Visitors come from:

- Maryland residents make up 33 percent of visitors to the State while 37 percent came from Pennsylvania, Virginia, New Jersey, and New York. The majority of the remainder came from States along the Eastern Seaboard.

What that means for the Maryland economy:

Travel and tourism expenditures totaled \$11.4 billion in 2006. Moreover, the economic impact of the travel and tourism sectors—both the direct spending by visitors and the secondary expenditures by the travel sector businesses and employees who work in the sector – totaled more than \$17 billion.

Sources: D.K. Shifflet & Associates Ltd. DIRECTIONS® Travel Intelligence SystemSM. The Economic Impact of Travel on Maryland Counties 2006; Travel Industry Association

Western Region

Central Region

Capital Region

Eastern Shore

Southern Region



Regional/County Map of Maryland

County Tourism Taxes & Grants

	CY 06 State Tourism Tax Revenue*	CY 06 Local Tourism Tax Revenue**
Allegany	\$3,960,000	\$3,180,000
Garrett	\$5,970,000	\$9,320,000
Washington	\$10,360,000	\$5,790,000
Western Region Total	\$20,290,000	\$18,290,000
Frederick	\$10,470,000	\$5,540,000
Montgomery	\$73,960,000	\$54,310,000
Prince George's	\$49,860,000	\$33,560,000
Capital Region Total	\$134,290,000	\$93,410,000
Anne Arundel	\$70,180,000	\$78,990,000
Baltimore City	\$77,330,000	\$54,060,000
Baltimore County	\$40,390,000	\$31,440,000
Carroll	\$4,060,000	\$2,620,000
Harford	\$10,460,000	\$5,720,000
Howard	\$20,170,000	\$16,980,000
Central Region Total	\$222,590,000	\$189,810,000
Calvert	\$3,720,000	\$5,200,000
Charles	\$4,880,000	\$4,450,000
Saint Mary's	\$2,940,000	\$3,870,000
Southern Region Total	\$11,540,000	\$13,520,000
Caroline	\$350,000	\$240,000
Cecil	\$6,290,000	\$8,280,000
Dorchester	\$1,010,000	\$2,180,000
Kent	\$1,240,000	\$2,530,000
Queen Anne's	\$2,020,000	\$3,090,000
Somerset	\$480,000	\$1,090,000
Talbot	\$7,120,000	\$5,710,000
Wicomico	\$6,990,000	\$5,880,000
Worcester	\$61,630,000	\$75,630,000
Ocean City	Included above	Included above
Eastern Shore Total	\$87,130,000	\$104,630,000
TOTAL	\$475,840,000	\$419,660,000

Sources: Maryland Comptroller of the Treasury, Maryland county budget offices, Travel Industry Association of America

CY 06 Total State & Local Tourism Tax Revenue*	County FY 07 Tourism Budget	County Grant Awarded FY 07
\$7,140,000	\$512,103	\$36,943
\$15,290,000	\$1,149,172	\$43,333
\$16,150,000	\$899,950	\$63,224
\$38,580,000	\$2,561,225	\$143,500
\$16,010,000	\$1,420,334	\$148,527
\$128,270,000	\$798,400	\$64,733
\$83,420,000	\$902,603	\$70,785
\$227,700,000	\$3,121,337	\$284,045
\$149,170,000	\$1,218,939	\$56,525
\$131,390,000	\$9,916,490	\$187,500
\$71,830,000	\$199,000	\$10,000
\$6,680,000	\$288,400	\$23,756
\$16,180,000	\$188,000	\$12,558
\$37,150,000	\$571,869	\$70,337
\$412,400,000	\$12,382,698	\$360,676
\$8,920,000	\$489,100	\$39,523
\$9,330,000	\$304,000	\$62,321
\$6,810,000	\$408,213	\$59,629
\$25,060,000	\$1,201,313	\$161,473
\$590,000	\$101,000	\$14,757
\$14,570,000	\$187,000	\$39,419
\$3,190,000	\$396,082	\$51,959
\$3,770,000	\$285,602	\$54,186
\$5,110,000	\$261,805	\$26,712
\$1,570,000	\$300,170	\$14,272
\$12,830,000	\$475,833	\$89,840
\$12,870,000	\$769,000	\$35,510
\$137,260,000	\$339,951	\$39,200
Included above	\$2,166,898	\$187,500
\$191,760,000	\$5,283,341	\$553,354
\$895,500,000	\$24,549,914	\$1,503,049

*TIA Calendar Year 2006 estimates include tax revenues from the following taxes: sales and gross receipts, corporate and individual income, and excise. **TIA Calendar Year 2006 estimates include county and city tax revenues from the following taxes: sales and gross receipts, corporate and individual income, excise and property.

Tourism's Positive Effect on Maryland's Employment

Allegany
Garrett
Washington
Western Region Total
Frederick
Montgomery
Prince George's
Capital Region Total
Anne Arundel
Baltimore City
Baltimore County
Carroll
Harford
Howard
Central Region Total
Calvert
Charles
Saint Mary's
Southern Region Total
Caroline
Cecil
Dorchester
Kent
Queen Anne's
Somerset
Talbot
Wicomico
Worcester
Eastern Shore Total
International Tourism-generated Employment*
TOTAL MD

Sources: 2006 employment reported by the Maryland Department of Labor, Licensing and Regulation. 2006 tourism employment reported by the Travel Industry Association of America.

Direct Tourism Employment	Tourism % of Total Employment	Direct Tourism Payroll
810	2.4%	\$17,670,000
1,450	9.1%	\$34,090,000
2,160	3.2%	\$54,140,000
4,420	3.8%	\$105,900,000
2,160	1.8%	\$49,760,000
15,880	3.1%	\$395,560,000
9,650	2.2%	\$220,310,000
27,690	2.6%	\$665,630,000
24,230	8.9%	\$907,860,000
16,240	6.2%	\$385,410,000
7,430	1.8%	\$197,500,000
710	0.8%	\$18,160,000
2,410	1.9%	\$56,390,000
5,080	3.3%	\$149,060,000
56,100	4.2%	\$1,714,380,000
790	1.7%	\$17,690,000
1,020	1.4%	\$22,550,000
730	1.5%	\$21,430,000
2,540	1.5%	\$61,670,000
100	0.6%	\$1,400,000
1,470	3.0%	\$37,380,000
100	0.6%	\$4,270,000
320	3.1%	\$7,780,000
440	1.8%	\$9,850,000
100	0.9%	\$2,380,000
1,640	8.9%	\$36,820,000
1,990	3.9%	\$65,040,000
14,910	56.1%	\$332,100,000
21,070	9.4%	\$497,020,000
4,600	N/A	\$12,020,000
116,420	4.5%**	\$3,164,800,000

* Not available on a county level.

** Includes employment as a result of international visitors.

Maryland Office of Tourism Development County Contacts List

County Tourism Officials are hospitality professionals who market and promote their county to consumers within their jurisdiction, the region and the world.

ALLEGANY COUNTY

Kim Shirer, Director of Tourism Programs
Allegany County Dept. of Tourism
13 Canal Place, Rm 306, Cumberland, MD 21502
301-777-5134; 800-425-2067
Fax: 301-777-5137
Email: kim@mdmountainside.com

ANNAPOLIS / ANNE ARUNDEL COUNTY

Connie DelSignore, President and CEO
Annapolis & Anne Arundel County CVB
26 West Street, Annapolis, MD 21401
410-280-0445 Fax: 410-263-9591
Email: cdelsignore@visitannapolis.org

BALTIMORE CITY

Sam Rogers
Executive Vice President and Chief Marketing Officer
Baltimore Area Convention & Visitors Association
100 Light Street, 12th Floor, Baltimore, MD 21202
410-319-0977; Fax: 410-727-2308
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BALTIMORE COUNTY

Craig Peddicord, Executive Director
Baltimore County Convention and Visitors Bureau
P.O. Box 5426, Lutherville, MD 21094-5426
410-296-4886; 800-570-2836
Fax: 410-296-8618; 877-782-9636 (info/call ctr)
Email: info@visitbacomd.com

CALVERT COUNTY

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Calvert County Dept. of Economic Development
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CAROLINE COUNTY

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CARROLL COUNTY

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CECIL COUNTY

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Cecil County Tourism
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Maryland Office of Tourism Development County Contacts List (continued)

CHARLES COUNTY

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Charles County Economic Development
Tourism Marketing
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301-645-0551; Fax: 301-638-2408
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DORCHESTER COUNTY

Amanda Fenstermaker, Director
Dorchester County Tourism
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410-228-1000; Fax: 410-221-6545
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FREDERICK COUNTY

John Fieseler, Executive Director
Tourism Council of Frederick County, Inc.
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301-600-2888; 800-999-3613
Fax: 301-600-4044
Email: tourism@fredco-md.net

GARRETT COUNTY

Sarah Duck, Director of Marketing
Garrett County Chamber of Commerce
15 Visitors Center Drive, McHenry, MD 21541
301-387-4386 ext. 13; Fax: 301-387-2080
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HARFORD COUNTY

Winifred Roche, Tourism Manager
Harford County Office of Tourism
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410-638-3327; Fax: 410-879-8043

443-544-4695 - Visitor Information
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HOWARD COUNTY

Rachelina Bonacci, Executive Director
Howard County Tourism, Inc.
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Ellicott City, MD 21043
410-313-1900; 800-288-8747; Fax: 410-313-1902
Email: rachelina@visithowardcounty.com

KENT COUNTY

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MONTGOMERY COUNTY

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PRINCE GEORGE'S COUNTY

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Maryland Office of Tourism Development County Contacts List (continued)

QUEEN ANNE'S COUNTY

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ST. MARY'S COUNTY

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TALBOT COUNTY

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WASHINGTON COUNTY

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WICOMICO COUNTY

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WORCESTER COUNTY

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OCEAN CITY

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Ocean City CVB/Ocean City Tourism
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Email: dtravers@ococean.com

Tourism Delivered Great Returns for Maryland in 2006

Visitor spending totaled
more than \$11.4 billion.

Tourism employed more than 116,000
with a payroll of more than \$3.1 billion.

Tourism generated \$895 million
in State and local taxes.

Without tourism, Maryland households
would pay \$420 more in State and local
taxes each year or face cuts
in programs or services.



Martin O'Malley, Governor | Anthony G. Brown, Lt. Governor

www.visitmaryland.org | 410-767-6278