

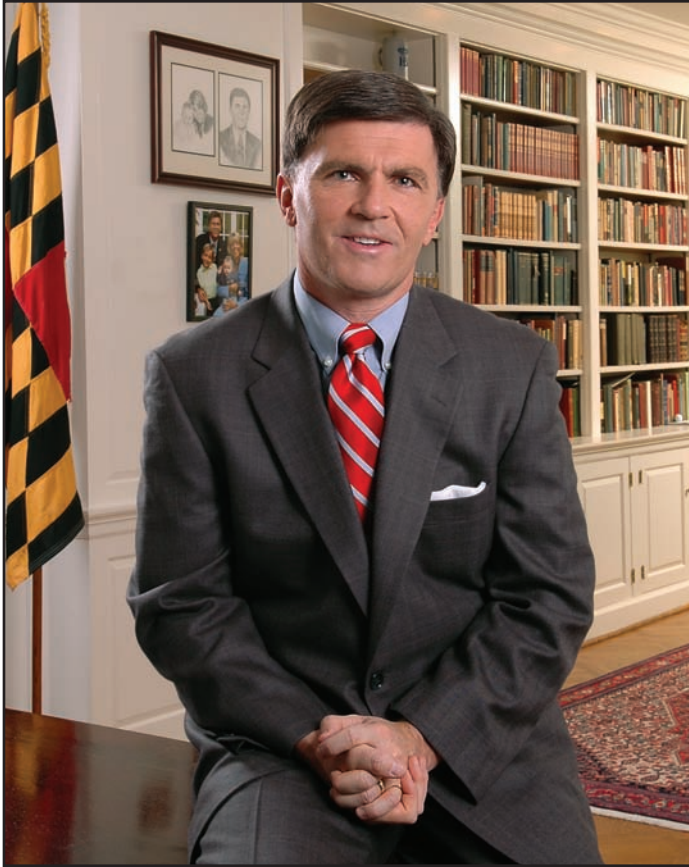
FY 2006 TOURISM DEVELOPMENT ANNUAL REPORT

The Maryland Tourism Development Board
and The Office of Tourism

1-877-333-4545 | VisitMaryland.org



WELCOME



Dear Tourism Partner:

We are proud and grateful that the tourism industry is "Taking Care of Business" in Maryland! As part of our tourism group, individually and collectively, you are among the most dedicated and hard-working professionals in the State. Your efforts have helped boost Maryland out of its deficit-driven malaise, and have made our State economically vibrant.

From jobs to successful businesses, this Administration recognizes that the quality of life in Maryland is directly affected by the many aspects of the tourism industry. Accordingly, in Fiscal Year 2007, I have added an additional \$1.5 million to the budget of the Maryland Tourism Development Board to ensure that the Maryland Office of Tourism can continue to expand its marketing efforts and showcase

Maryland as a world-class travel destination. A portion of the additional dollars will be invested with the Destination Marketing Organizations (DMO) as the State's partner in successful tourism promotion. Further, the effect of the additional \$500,000 in the Maryland Tourism Development Board's grant program will enable those counties that invest in tourism marketing to continue to build on their successful advertising and promotional campaigns.

The major reason we invested in the Maryland Office of Tourism's marketing program is simple – it works. In this Annual Report, you will read how nearly 28 million people came to visit Maryland, and spent more than \$10 billion on accommodations, attractions, and services. The return on investment, which has been increasing every year, has now topped \$34 for each \$1 the State has spent!

I am proud of the work of the Maryland Office of Tourism, and grateful for the industry's contributions to the State's economic health through successful private and public sector partnerships. I join the citizens of Maryland in looking forward to welcoming more visitors to our State, and I thank you for your part in this most important effort.

With the pledge of continued support to Maryland tourism, I remain

Very truly yours,

Robert L. Ehrlich, Jr.
Governor

MISSION STATEMENT

The Maryland Office of Tourism’s mission
is to increase tourism expenditures to the state.



WELCOME

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

Robert L. Ehrlich, Jr., Governor
Michael S. Steele, Lt. Governor

Department of Business and
Economic Development
Aris Melissaratos, Secretary

Division of Tourism, Film and the Arts
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2004 ECONOMIC IMPACT OF TRAVEL IN MARYLAND

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.

Direct Employment

Category	Domestic		International		Total
	2003	2004	2003	2004	2004
Public Transportation	18,650	18,680	410	420	19,090
Auto Transportation	4,210	4,260	20	20	4,280
Lodging	18,770	18,980	1,330	1,330	20,310
Food Service	45,580	47,160	1,310	1,330	48,490
Entertainment & Recreation	13,670	14,310	660	690	15,000
General Retail Trade	5,130	5,310	670	690	6,000
Travel Planning	2,190	2,220	N/A	N/A	2,220
Totals	108,190	110,920	4,380	4,470	115,390

Expenditures (\$millions)					
Category	Domestic		International		Total
	2003	2004	2003	2004	2004
Public Transportation	\$2,221.2	\$2,345.0	\$45.2	\$47.0	\$2,392.0
Auto Transportation	1,456.1	1,637.7	4.1	4.9	1,642.6
Lodging	1,617.2	1,760.6	97.6	106.4	1,867.0
Food Service	2,309.7	2,511.4	57.6	61.8	2,573.2
Entertainment & Recreation	685.4	702.1	30.0	31.7	733.8
General Retail Trade	722.7	777.7	84.6	90.0	867.7
Travel Planning	NA	NA	NA	NA	NA
Totals	\$9,012.3	\$9,734.5	\$319.0	\$341.8	\$10,076.3

Note: Numbers are based on calendar year.
Source: Travel Industry Association of America, Most current data available.

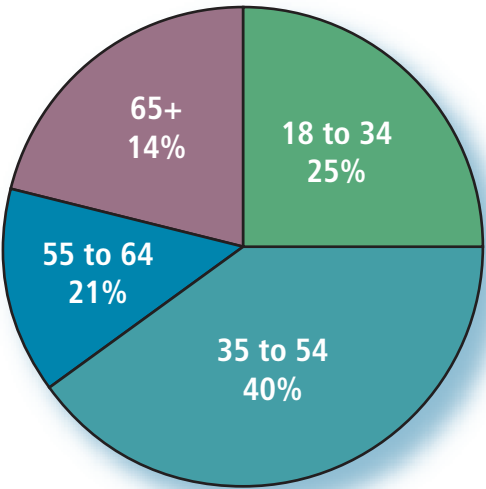
TRAVEL IN MARYLAND: 2005 REVIEW

In 2005, nearly 28 million person trips were taken to the state. The average stay in Maryland was 1.7 nights in 2005. Average per household spending in Maryland decreased from \$353 in 2005. Lower average stay in 2005 is in part attributable to the data, which is designed to better capture the volume of day trips.

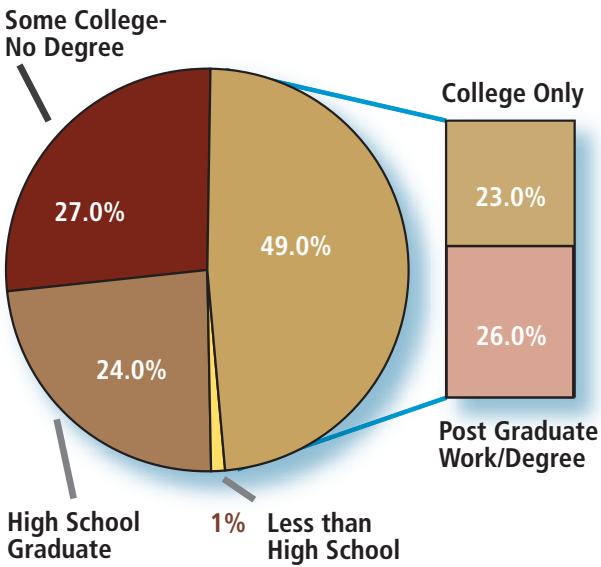
The top originating states for travelers to Maryland in 2005 were Maryland, Virginia, Pennsylvania, New Jersey, New York, West Virginia, North Carolina, Delaware, Florida, Ohio, and Washington, D.C. Travelers from these states made up about 87 percent of all travelers to the state.

The graphs below summarize the major demographic characteristics of the average domestic traveler to Maryland.

Age of Head of Household



Education of Household



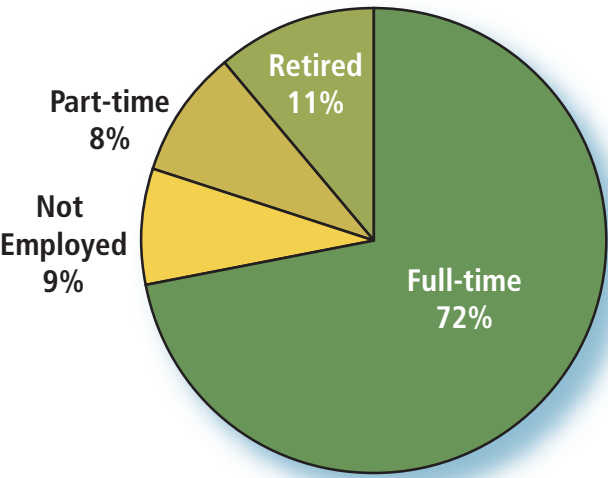
Some facts about Maryland visitors:

- ❑ The average traveler to Maryland is visiting with one other person from the household, stayed 1.7 nights and spent \$353 in the state.
- ❑ Seventy-eight percent of Maryland visitors traveled for pleasure; while another 22 percent traveled for business.
- ❑ The primary transportation mode for 88 percent of travelers to Maryland is car or truck; while 9 percent travel by air.
- ❑ Half of Maryland visitors spent at least one night. Sixty percent stayed in paid accommodations - hotels, motels, B&Bs, and condos/timeshares while 31 percent stayed in private homes.
- ❑ The number one activity for Maryland visitors was dining, followed by shopping, entertainment, touring/sightseeing and beach/waterfront.

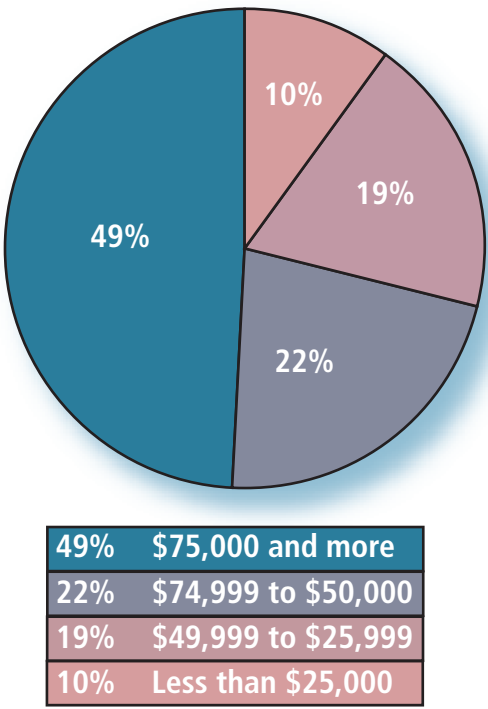
Some facts about Maryland visitors:

- ❑ The average age of travelers to Maryland in 2005 was 48 years old.
- ❑ Travelers to Maryland are well educated, with 49 percent having completed college. Of those travelers with a college degree, nearly 26 percent have done post-graduate work or have a post-graduate degree.
- ❑ Seventy-two percent are employed full-time and 11 percent are retired. The largest percent (41%) are employed in managerial and professional occupations.
- ❑ Forty-nine percent (49%) have average annual household incomes of \$75,000 or more. The average annual household income is \$79,201.
- ❑ Sixty-eight percent (68%) of travelers are married and 25 percent have children living in the household.

Employment Status of Head of Household



Annual Household Income



The source of information in this report is TravelScope/Directions. TravelScope/Directions is a national survey utilizing a consumer panel of 1.5 million U.S. households, which asks them for detailed information about all travel 50 miles or more away from home and/or overnight stay by all members of the household. Households are asked to recall travel during the previous month. The purpose of the survey is to provide states with an accurate representation of the number and characteristics of tourists to their state. “Destination/Overnight Person-Trips” refers to all trips to Maryland except those persons who are just passing through. All data in this section is based on Destination/Overnight Person-Trips.

Note: TIA changed their methodology for travel-related data collection, therefore no previous data is available for Maryland. As a result, no comparisons are available this year.

Office of Tourism Highlights

The Maryland Office of Tourism's promotional efforts and successes are collaborative in nature. There are events and activities that require assistance and knowledge not only from the office, but from our partners throughout the state in the private and public sectors. These are some highlights of those type of activities:



■ Governor Robert L. Ehrlich, Jr. proposed a \$1.5 million budget increase to the Maryland Tourism Development Board, which would increase the Board's budget in Fiscal Year 07 to \$7 million. The industry unified under the *Seven in Seven* banner. Destination Marketing Officials, Executive Directors Council, the Maryland Tourism Development Board and industry leaders held educational meetings with their legislative leadership to ensure that Governor's funding remained whole during the session.

■ The Volvo Around the World Race returned to Maryland's Chesapeake Bay. The multicity, multiday event was televised internationally bringing the Chesapeake Bay to the forefront of sailing enthusiasts worldwide and generated more than \$50 million in economic impact.



The Volvo Around the World Race made its quadrennial stop in Maryland.

■ The MISS USA® pageant returned to Baltimore and delivered more than 8 million viewers that were treated to a 10-minute promotional video of Maryland that included Ocean City, Annapolis, Deep Creek Lake, St. Michaels, Harford County, Havre de Grace and Baltimore. The promotional exposure was \$14 million and generated \$3 million in direct expenditures.



Newly crowned MISS USA® 2006, Tara Conner and her fellow contestants, and their families delivered a \$3 million economic impact to Maryland.



Product Development

The purpose of this unit is to engage in aggressive product development, administer the County Cooperative Marketing Grants Program, provide exceptional visitor services and obtain outside funds for marketing and development activities. The unit implements its program of work through the administration of the Attraction Signs Program, Product Development and Maryland's 13 Welcome Centers.

■ OTD awarded \$1 million in grant funds through the County Cooperative Grants Program to the 25 Destination Marketing Organizations, who in turn spent \$4,681,896 of their own funds for a total marketing impact of \$5,681,896. The funds were spent on marketing activities which include advertising placement, exhibiting in trade/consumer shows and participation in OTD-sanctioned sales and development activities such as Maryland Civil War Trails.

■ The Mason and Dixon Discovery Center on U.S. 15 Southbound in Emmitsburg is Maryland's newest welcome center. With the goal of better serving travelers, it is a model for the enhancement of welcome centers throughout the state.

■ The Historic National Road, the state's only federally designated All-American Road, opened on May 15, 2006, as Maryland's official kick-off to National See America Week. The byway now features 57 interpreted waysides, a map-guide and web pages on the OTD web site.

■ OTD received a \$144,000 grant award from the National Scenic Byways Program to conduct an economic impact and market study on Maryland's statewide network of scenic byways.

■ Through participation on the Working Group of the Chesapeake Bay Gateways Network (CBGN), the Product Development Unit helped to increase the number of Gateways from 82 to 87 and facilitated \$759,599 in Gateway grant awards to 1 of those Gateways.

■ OTD launched its statewide Underground Railroad map-guide in partnership with the National Park Service's Network to Freedom Program. Over the past two year's, OTD helped to increase the state's number of authentic Underground Railroad sites, programs and facilities from 3 to 32.



State and local dignitaries cut the ribbon on the new Mason Dixon Discovery Center at Emmitsburg.

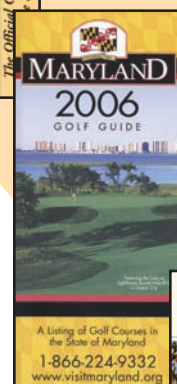
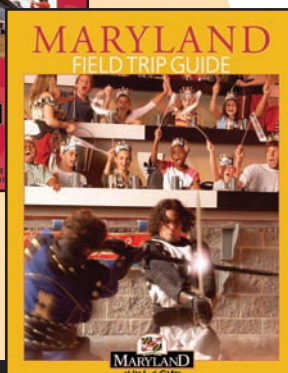
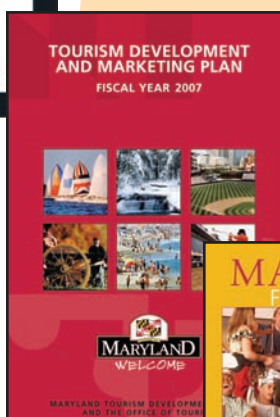
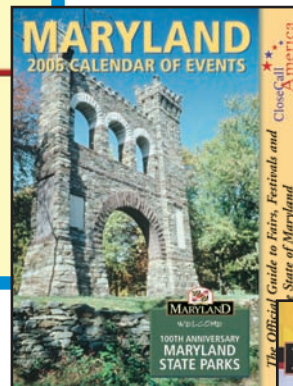


Governor Ehrlich announces the new Underground Railroad map-guide.

Advertising and Communications

The purpose of the unit is to develop a communications program, which consists of advertising, publication, public relations and special promotions. This unit's goal is to encourage consumers and the trade to select Maryland as a leisure and business travel destination.

- The state's primary travel publication, *Destination Maryland*, won overall best economic development publication from the Northeast Economic Development Association.
- The cost per lead for advertising has decreased from \$8.77 to \$5.05. This is a result of highly targeted placements and creative development.
- The public relations team generated nearly \$38 million in travel-related media coverage. The state received incredible media coverage during the Today show's Hometown wedding which resulted in more than \$15 million of Maryland related coverage. While discounting the Today show's value, the public relations team increased press coverage of the state by 13% year over year.



Sales and Marketing

The Sales and Marketing Unit promotes the state’s diverse tourism products to a variety of buyers. Products include Meetings & Conventions, Sports, Package Tours and Sales to Consumers in both the domestic and selected international markets. The unit also works with the clients, develops leads and distributes them to Maryland suppliers, and creates additional sales opportunities.

Tour and Travel

■ Led Maryland partners on the Maryland on the Road (MORE) Sales Blitz and the Mini-Maryland on the Road (Mini-MORE) Sales Blitz. A total of 36 partners met with 76 representatives from 36 tour companies in New York and New Jersey. Private sector investment in this blitz was more than \$26,000.

■ Created a “Team” to promote Maryland at 14 Group Leaders of America (GLAMER) marketplaces. “Team” participants sponsored and staffed one show allowing Maryland to be promoted to more than 1,600 potential buyers of group tour products. Total private sector booth sponsorship contribution exceeded \$6,000.

■ Coordinated the Maryland marketing team (including the private sector and DMOs) at the National Tour Association, American Bus Association, Travel Connections, Travel Expo-NY, Travel Experiences, Greater New Jersey Motorcoach and the Pennsylvania Bus Association Marketplace. OTD supported these marketplaces through sponsorships and thematic coordination. These initiatives have included more than 90 Maryland marketing partners. Received award for Best Regional Display at PA Bus.



The OTD marketing team at Pennsylvania Bus Association Marketplace.

■ Potential Revenue from RFPs was \$551,640; reported bookings were \$268,384

Leads Distributed for FY 2006

Meetings	513
Reunions	7
Tour Operator	503
Group Leaders	1659
Consumer	370

International

■ OTD hosted 12 familiarization tours for 77 international tour operators, travel agents and receptive operators in Maryland. Our private sector partners contributed more than \$55,000 to support the Capital Region USA’s (CRUSA) marketing efforts to promote to our international markets.



Maryland sales team at World Travel Market London, England.

■ The Capital Region USA Holiday Guide, which is used to promote the region in our target markets, became self supporting with the growing commitment of advertisers that support CRUSA and our primary promotional piece. Advertising response was up 15% in the United Kingdom and there was a 27% increase in internet traffic to the CRUSA web site.

Return on Investment (ROI) of OTD’s Advertising and Fulfillment

	FY 03 Advertising & Inquiry Fulfillment	FY 04 Advertising & Inquiry Fulfillment	FY 05 Advertising & Inquiry Fulfillment	FY 06 Advertising & Inquiry Fulfillment
Total Number of Inquirers/ Visitors	224,369	275,966	329,092	535,168
Percentage of Inquirers that visit Maryland (within 4 months of advertisement and inquiry fulfillment)	62% 139,109	62% 171,099	64% 210,619	58% 322,402
Average Household Daily Trip Expenditure	\$119 \$16,553,945	\$129 \$22,071,761	\$124 \$26,116,741	\$208 \$66,930,593
Average Length of Stay (nights)	2.8	2.4	2.3	1.8
Total Dollars Spent in Maryland	\$46,351,045	\$52,972,226	\$60,068,505	\$120,475,067
Average Tourism Taxes Paid in Maryland	12.5%	12.5%	12.5%	12.5%
Taxes Paid in Maryland by Tourists Receiving Travel Information	\$5,793,881	\$6,621,528	\$7,508,563	\$15,059,383
Advertising Purchases and Fulfillment Expenditures	\$2,622,124	\$2,722,550	\$2,820,642	\$3,393,335
Return on Investment of State Taxes (to \$1.00)	\$2.21	\$2.43	\$2.66	\$4.27
Return on Investment of Tourism Economy (to \$1.00)	\$17.68	\$19.46	\$21.30	\$34.18

Note: Household expenditures and length of trip are based on Statewide averages derived from TravelScope survey.
Sources: TravelScope/Directions 2005 and OTD

*FY 06 ROI is not directly comparable to the previous ones due to changes in TIA travel data.

COUNTY GRANT AND TAX FACT SHEET FY 06

COUNTY	Hotel/ Motel Tax Revenue ¹			Amusement & Admission Tax			Total Hotel/Motel & AA Tax Revenue	Total 2 Tourism Tax Revenue	County Budget FY 06	County Grant Awarded FY 06
	FY 06 Rate	FY 06 Tax	Percent Change FY 05-06	FY 06 Rate	FY 06 Tax	Percent Change FY 05-06				
Allegany	8.0%	\$571,957	8.4%	7.5%	\$224,259	7.7%	\$796,216	\$2,850,000	\$416,293	\$37,007
Anne Arundel	7.0%	14,566,332	10.0%	10.0%	7,706,178	0.4%	22,272,510	71,860,000	1,221,300	43,508
Baltimore City	7.5%	20,510,000	10.8%	10.0%	8,746,201	0.7%	29,256,201	49,270,000	9,096,720	125,000
Baltimore County	8.0%	8,006,864	1.8%	10.0%	6,850,725	-3.8%	14,857,589	29,180,000	185,000	11,588
Calvert	0.0%	N.A.	N.A.	1.0%	608,013	35.7%	608,013	4,580,000	474,149	44,007
Caroline	0.0%	N.A.	N.A.	0.0%	5,569	44.5%	5,569	220,000	93,428	11,682
Carroll	0.0%	N.A.	N.A.	10.0%	757,014	-2.4%	757,014	2,280,000	203,820	19,026
Cecil	8.0%	278,490	20.2%	6.0%	347,751	-1.5%	626,241	7,340,000	175,000	24,103
Charles	5.0%	822,751	5.6%	10.0%	800,729	1.0%	1,623,480	3,940,000	414,800	63,234
Dorchester	5.0%	1,014,530	6.1%	0.5%	122,319	1.9%	1,136,849	2,010,000	349,362	31,290
Frederick	0.0%	1,053,719	30.4%	0.5%	1,427,252	8.4%	2,480,971	4,900,000	1,107,420	49,306
Garrett	5.0%	1,242,121	30.8%	4.5%	599,983	15.2%	1,842,104	8,500,000	1,061,863	55,264
Harford	0.0%	N.A.	N.A.	5.0%	856,210	8.0%	856,210	5,010,000	188,003	15,226
Howard	5.0%	3,696,461	29.0%	7.5%	1,952,808	2.1%	5,922,269	15,130,000	468,626	46,746
Kent	3.0%	185,396	30.2%	4.5%	65,039	2.3%	250,435	2,360,000	262,094	23,126
Montgomery	7.0%	14,500,000	3.7%	7.0%	4,534,413	0.8%	19,034,413	47,370,000	704,950	50,916
Prince George's	5.0%	6,854,178	10.8%	10.0%	15,427,338	21.9%	22,281,516	29,370,000	973,966	30,754
Queen Anne's	3.0%	454,182	125.0%	5.0%	267,101	19.5%	721,283	2,770,000	285,051	24,422
St. Mary's	5.0%	551,663	28.4%	2.0%	124,220	2.1%	675,883	3,490,000	360,117	38,632
Somerset	5.0%	71,057	14.5%	4.0%	28,355	-21.1%	99,412	970,000	273,370	14,882
Talbot	4.0%	975,000	29.2%	5.0%	119,168	14.8%	1,094,168	5,140,000	467,215	39,935
Washington	6.0%	1,475,969	9.5%	5.0%	600,920	6.9%	2,076,889	5,000,000	770,000	24,072
Wicomico	6.0%	1,043,303	34.9%	4.5%	531,766	12.5%	1,575,069	5,400,000	749,356	27,108
Worcester*	4.0%	10,104,905	2.0%	3.0%	1,811,222	3.6%	11,916,127	70,810,000	2,394,078	149,316
TOTAL		\$88,251,876	9.3%		\$54,514,553	6.4%	\$142,766,429	\$379,750,000	\$22,695,981	\$1,000,150

Notes: *Worcester County includes Ocean City.

1. Some figures for hotel/motel tax revenue are unaudited/preliminary.

2. Total Tourism Tax Revenue includes a portion of local taxes such as property tax, income tax, sales tax generated by local tourism businesses in addition to Hotel/Motel and AA taxes.

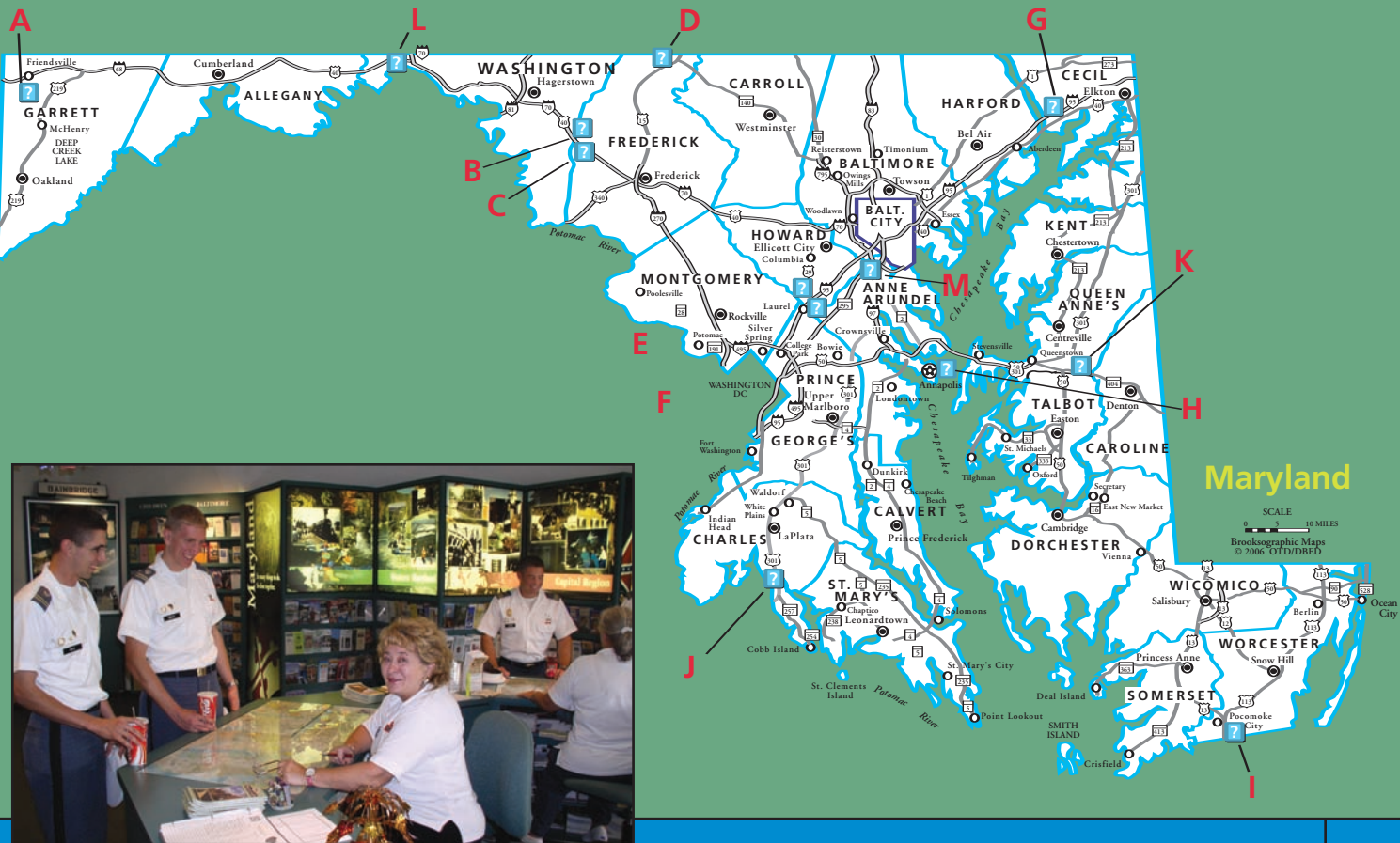
Sources: Amusement Admission-Comptroller of the Treasury,

Hotel/Motel Tax Rate-Department of Legislative Services, Uniform Financial Report, Total Tourism Tax Revenue-Economic Impact of Travel on Maryland Counties 2004, TIA County Budgets- OTD County Grant Application Forms.

In partnership with the Destination Marketing Organizations (DMOs), the Maryland Office of Tourism operates a matching grant program. The grants are utilized for marketing and advertising efforts promoting Maryland as a world-class travel destination.

These grants are effectively and efficiently leveraged by the DMOs, and generate nearly \$5 return on each dollar.

WELCOME CENTER VISITORS



Welcome Center staff assists more than 2 million people each year that stop at the Welcome Centers for travel information.

Welcome Center	Visitors		Percent Change FY05-06
	FY05	FY06	
A. Youghiogheny	89,595	78,584	-12.3%
B. I-70 West	77,902	77,252	-0.8%
C. I-70 East	113,497	107,949	-4.9%
D. U.S. 15	73,276	69,580	-5.0%
E. I-95 South	178,252	150,091	-15.8%
F. I-95 North	181,016	163,662	-9.6%
G. Chesapeake House	266,971	257,465	-3.6%
H. State House	174,165	164,324	-5.7%
I. U.S. 13	217,206	213,963	-1.5%
J. Crain Memorial	130,424	138,804	6.4%
K. Bay Country	86,948	78,571	-9.6%
L. Sideling Hill	124,122	112,455	-9.4%
M. BWI Welcome Center	363,989	387,734	6.5%
Total	2,077,363	2,000,434	-3.7%

Note: Welcome Center statistics are obtained by door counters and staff tallies.

TOP 10 STATES OF ORIGIN FOR VISITORS TO MARYLAND

ADVERTISING INQUIRIES					
FY 04	Percent	FY 05	Percent	FY 06	Percent
Pennsylvania	11.7	Pennsylvania	10.7	New York	10.3
New York	9.4	New York	10.4	Pennsylvania	10.0
New Jersey	7.0	New Jersey	7.3	New Jersey	7.4
Virginia	4.9	Virginia	5.1	Virginia	5.7
California	4.2	Ohio	4.1	Ohio	4.6
Ohio	4.0	California	3.8	North Carolina	3.9
Texas	3.7	Texas	3.4	Texas	3.7
Florida	3.6	North Carolina	3.2	California	3.4
Illinois	3.2	Florida	3.0	Florida	3.2
North Carolina	2.4	Illinois	2.7	Massachusetts	2.5
Total	54.1	Total	53.7	Total	54.7
Maryland	13.0	Maryland	14.8	Maryland	14.7
TRAVELSCOPE					
CY 03		CY 04		CY 05	
Pennsylvania	17.7	Pennsylvania	13.7	Virginia	16.4
Virginia	10.3	Virginia	13.0	Pennsylvania	16.0
New York	8.3	New York	6.7	New Jersey	6.8
New Jersey	7.8	New Jersey	4.4	New York	4.7
North Carolina	3.7	Delaware	3.7	West Virginia	2.5
Florida	3.3	Florida	3.6	North Carolina	2.4
Ohio	2.3	North Carolina	2.9	Delaware	2.0
Delaware	2.2	California	2.9	Florida	1.9
Texas	2.2	West Virginia	2.4	Ohio	1.7
California	2.0	Ohio	2.3	Washington, D.C.	1.6
Total	59.8	Total	55.6	Total	56.0
Maryland	23.1	Maryland	26.0	Maryland	31.0
WELCOME CENTERS					
FY 04		FY 05		FY 05	
Pennsylvania	14.3	Pennsylvania	14.9	Pennsylvania	14.6
New York	13.5	New York	13.0	New York	13.6
Virginia	10.9	Virginia	10.4	Virginia	10.5
New Jersey	9.1	New Jersey	8.9	New Jersey	7.9
Washington, D.C.	4.3	Ohio	4.2	Ohio	4.3
Florida	3.9	Washington, D.C.	4.1	Washington, D.C.	3.9
North Carolina	3.6	Florida	3.6	Florida	3.8
Ohio	3.5	North Carolina	3.5	North Carolina	3.6
West Virginia	2.4	West Virginia	2.5	West Virginia	2.6
Michigan	1.7	Michigan	2.0	Michigan	2.0
Total	67.2	Total	67.1	Total	66.8
Maryland	12.6	Maryland	12.7	Maryland	13.6

STATES THAT PLACED IN ALL THREE MEASUREMENTS:
FL, NC, NJ, NY, OH, MD, PA, VA

FY 06 DOMESTIC ADVERTISING: Activity and Response Volume

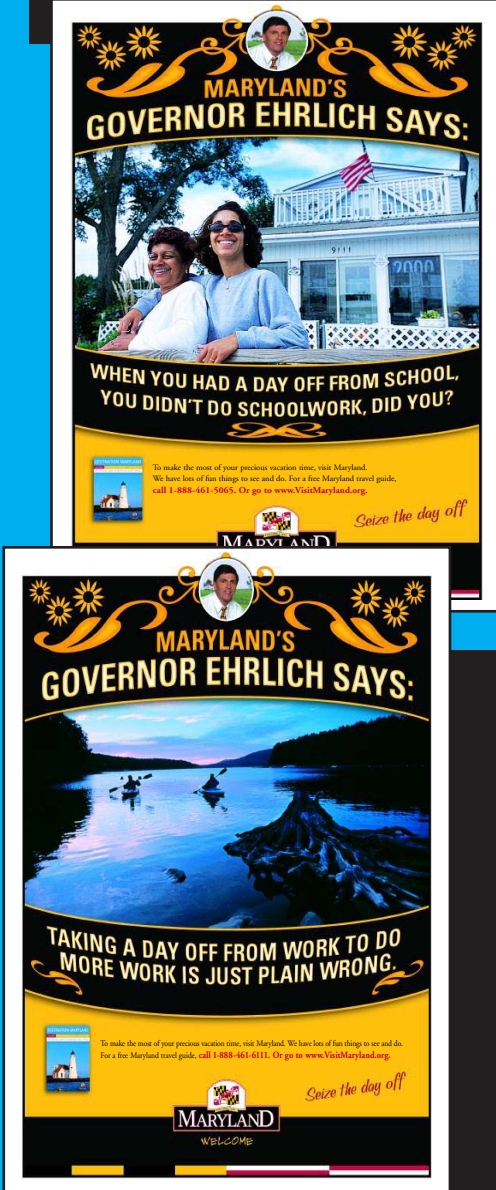
Consumer Print Advertising

Magazine	Total Leads	Total Ad Buy	Cost Per Lead	Magazine	Total Leads	Total Ad Buy	Cost Per Lead
AAA Going Places	872	\$26,149	\$29.99	MD Vacation Planner	123	\$18,500	\$150.41
AAA Guide Book	685			Meredith Publications	13197	\$233,196	\$17.67
AAA Touch	65	\$5,374	\$82.68	MNI-Home Network	5	\$7,710	\$1,542
AAA World	1464	\$39,114	\$26.72	Mountain Bike Magazine	10		
African-American Brochure	57			Motor Home	17		
AMC Outdoors	11			National Baptist Covention		\$3,000	
American Heritage	19			National Geographic Traveler	45		
American Legacy	564	\$29,673	\$52.61	National/Regional Campground Directory	17		
American Photography	140			Natural History	670	\$11,835	\$17.66
American Vision	23			New York Daily News	22		
Arrive	44	\$12,000	\$272.73	New York Times Magazine	673	\$16,748.40	\$24.89
Audubon	4072	\$40,000	\$9.82	North East Golf Market Magazine	54		
Bed & Breakfast	15			NV Magazine	10	\$4,250	\$425
Black Enterprise	27	\$13,250	\$490.74	NY Times Sophisticated Traveler	12		
Boating	24			Outside Magazine	51		
Budget Travel	424			Pathfinders	16	\$15,980	\$998.75
Car and Travel	920	\$23,307	\$25.33	PGA Tour State Farm Classic	13		
Civil War Traveler	6616	\$4,760	\$0.72	Philadelphia Magazine	47	\$28,098	\$597.83
Coastal Living	2464	\$60,962	\$24.74	Pittsburgh Magazine	89	\$14,210	\$159.66
Conde Nast Traveler	532	\$29,312	\$55.10	Popular Photography	492		
Cooking Light	987	\$66,300	\$67.17	Preservation	1572	\$41,010	\$26.09
Country Living	13			Research Maryland College Book	18		
Destination MD Guide Trip Planner	924			Smithsonian	44		
Destination MD Outdoor Ad	12			Southern Living	8388	\$62,854	\$7.49
Endless Vacation	20			Toronto Star Newspaper	80		
Essence	32	\$22,519	\$703.72	Toronto Sun Newspaper	20		
Fisherman Magazine	18			Touring	11		
Forbes Magazine	26	\$78,000	\$3,000	Traditional Home	15		
Globe and Mail	75			Trailer Life	142		
Golf Digest	27			Travel 50 & Beyond	2284	\$2,140	\$0.94
Gourmet	24			Travel Information (AAA/Rand McNally)	12810	\$12,200	\$0.95
Great Vacations Getaways	5008	\$5,803	\$1.16	USA Weekend	4919	\$88,125	\$17.92
HTS-Orioles Schedule	13			VA Living	11	\$7,584	\$689.45
Interstate Exit Authority	11			Vacation Values Newspaper	9998	\$12,750	\$1.28
L'Actualite	16			Washington Golf Monthly	156		
Links	21			Washington Post	14		
London Free Press	10			Woman's Day	1204	\$31,368	\$26.05
Marine Trade Association	20			(Miscellaneous/Deactivated Lines)	360		
Maryland Golf Guide Brochure	91			COE Insertions		\$13,242.44	
Maryland Life	42	\$16,050	\$382.14	Total Print	84,105	\$1,097,373.84	\$13.05
Maryland Million/Preakness Program Ad Book	68						

FY 06 DOMESTIC ADVERTISING Activity and Response Volume

Electronic Media

	Total Cost	Total Leads	CPL
INTERNET			
Fall: New York Times, Tribune, Weater, Fool, History Channel, Soul of America, Yahoo, ValueClick, Real Cities Network, Google	\$203,020	145,953	
Spring: New York Times, History Channel, Soul of American, Yahoo, ValueClick, Google, Advertising.com, eBrains	\$180,000	191,524	
Total Internet	\$383,020	375,194	\$1.02
BROADCAST			
Cable TV			
Fall			
Fall 2005 Comcast SportsNet	\$36,125		
Comcast SportsNet			
Fall 2005 Network Cable TV	\$580,125		
A&E			
History Channel			
HGTV			
Target Market Cable TV	\$54,601		
Philadelphia Inerconnect (TNT, Lifetime)			
NY Interconnect (TNT, Lifetime)			
Greater Pittsburgh Interconnect (TNT, Lifetime)			
Spring			
Spring 2006 African American TV/Cable Media	\$42,100		
Philadelphia			
Spring 2006 Network Cable-DR: 60s	\$452,540		
A&E Channel			
History			
HGTV			
Total Cable TV	\$1,165,491	18,710	\$62.29
Radio			
Spring			
Spring 2006 African American Radio Promotion	\$160,000		
Philadelphia		56,871	
Richmond		288	
Total Radio	\$160,000	57,159	\$2.06
Total Broadcast	\$1,325,491	96,566	\$13.73
TOTAL ELECTRONIC	\$1,708,511	451,063	\$3.79



Summary Table

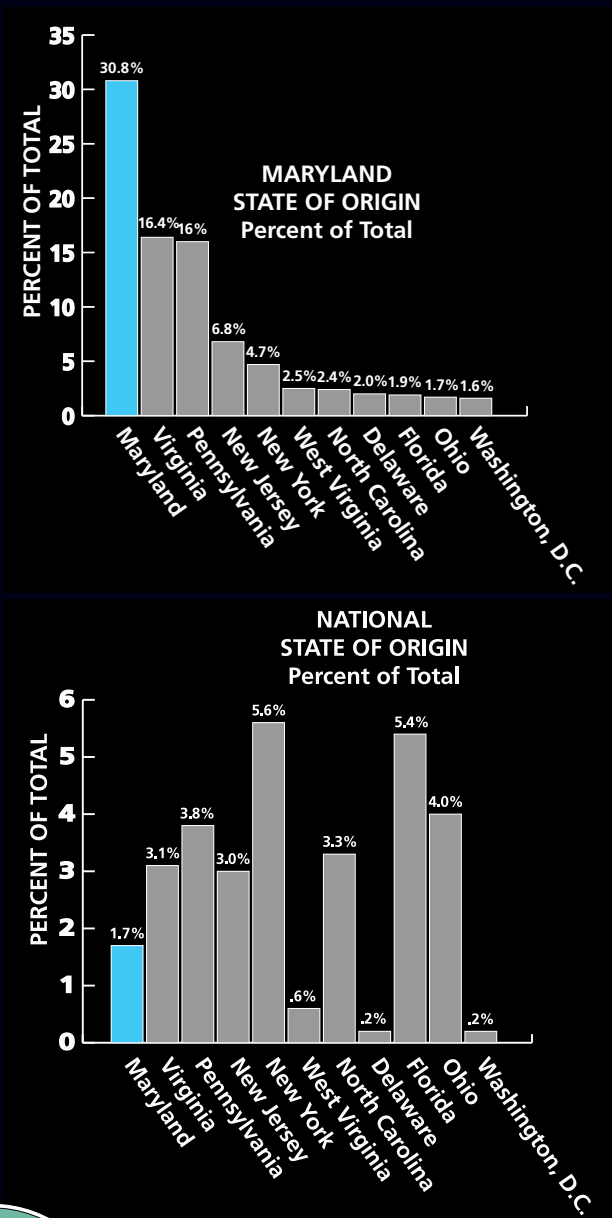
	Total Cost	Leads	CPL
Total Print	\$1,097,374	84,105	\$13.05
Total Electronic	\$1,708,511	451,063	\$3.79
FY 06 Total	\$2,805,885	555,865	\$5.24

Travel Trends

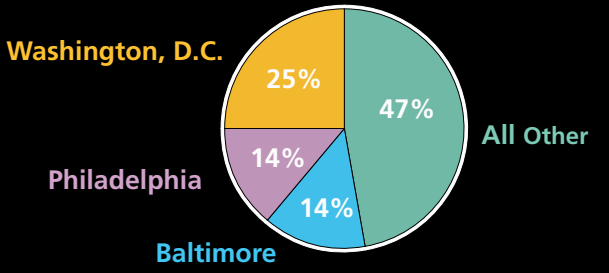
Maryland-United States Calendar Year: 2005

The following information is based on TravelScope/Directab data, a national survey utilizing a consumer panel of 1.5 million U.S. households. The households are selected to be representative of the U.S. household population to determine specific details about U.S. travel behavior. The survey asks for detailed information about all travel 50 miles or more away from home and/or overnight stay by all members of the household.

Traveler Profile	Maryland	National
	2005	2005
Person-Trips	27,780,000	1,992,440,000
Percent of National Total	1.4%	
Average HH Travel Party Size	1.8	1.9
Average Duration	1.7	1.7
Avg HH Trip Expenditures	\$353	\$361
Avg HH Income	\$79,201	\$68,891
Percent of Trips with Children	25.0%	22.0%
State of Origin	Percent of Total	Percent of Total
Maryland	30.8%	1.7
Virginia	16.4%	3.1
Pennsylvania	16.0%	3.8
New Jersey	6.8%	3.0
New York	4.7%	5.6
West Virginia	2.5%	0.6
North Carolina	2.4%	3.3
Delaware	2.0%	0.2
Florida	1.9%	5.4
Ohio	1.7%	4.0
Washington, D.C.	1.6%	0.2



2005 Top 3 Designated Market Areas (DMA) of Origin	
Washington, D.C.	25%
Philadelphia	14%
Baltimore	14%



We have distributed these travelers into each region according to the percentage that each region had of a Maryland total trip. No comparison over previous year is available due to changes in data collection by TIA.

Travel Trends

TRIP PROFILE	Maryland	National	TRIP PROFILE	Maryland	National
Purpose of Trip (Primary)	2005	2005	Activities (multiple responses - sum of percentage will exceed 100)		
Pleasure	78.2	75.3	Dining	35.0	33.0
Business	21.8	24.7	Shopping	21.7	26.8
Method of Travel			Entertainment	16.7	22.2
Auto/ Truck	82.6	80.0	Touring/Sightseeing	16.0	19.2
Rental Car	6.0	6.0	Beach/Waterfront	10.3	6.5
Camper/ RV	0.4	1.3	Night Life	7.5	7.0
Airplane	8.6	9.1	Museum, Art Exhibit	4.8	4.8
Bus	1.2	1.6	Watch Sports Events	4.6	4.6
Train	0.8	1.0	Visit Historic Site	4.6	4.9
Ship/ Boat	0.1	0.3	Festival, Craft Fair	3.8	5.1
Day Trip	51.3	51.0	Group Tour	3.1	2.7
Overnight Trip	48.7	49.0	Boat/Sail	3.0	1.5
Overnight Lodging			National/State Park	3.0	6.2
Paid Accommodations*	59.0	51.8	Looking at real estate	2.9	2.4
Private Home	30.5	32.0	Theme/Amusement Park	2.7	7.0
RV/ Tent	1.7	4.4	Concert, Play, Dance	2.6	5.2
Timeshare	1.1	1.9	Boat/Car/Home Show	1.9	1.7
2nd home/condo/apt	1.7	2.0	Nature/Culture	1.9	3.2
Ship/Cruise	0.5	0.8	Other Adventure Sports	1.7	2.0
Maryland Regions Visited**			Hunt, Fish	1.3	2.7
Central Region	13,833,716		Gamble	1.3	6.2
Eastern Shore	6,878,876		Play Golf	1.1	2.1
Capital Region	3,929,849		Hike, Bike, etc.	1.1	3.2
Western Maryland	2,233,688		Snow ski, Snow Board	0.9	1.0
Southern Maryland	903,871		Camping	0.4	1.9
Total	27,780,000		No activity mentioned	36.6	29.5

*Include hotel/motel, resort, all suite hotels, and bed & breakfast.
**About 23% of the travelers to Maryland did not indicate where specifically they traveled within Maryland.

Maryland's 2005 Top Two Destinations Fact Sheet		
	Baltimore City	Ocean City
Person Trips	8,883,697	3,957,421
Percent of Maryland	32.0%	14.2%
Total Travel Party Size	2.0	3.9
Average Trip Length	1.7 nights	2.9 nights
Average HH Trip Expenditure	\$338	\$780
Day Trip (% of total person trips)	4,886,033 (55%)	1,108,078 (28%)
Top 3 DMAs of Origin	Washington, D.C.	Baltimore
	Philadelphia	Washington, D.C.
	Harrisburg-Lancaster-Lebanon-York	Philadelphia
Top 5 Activities	Dining	Beach/Waterfront
	City/Urban sightseeing	Shopping
	Entertainment	Dining
	Shopping	Entertainment
	Museum/Art exhibit	Touring/Sightseeing

<div data-bbox="109 105 498 208"> MARYLAND OFFICE OF TOURISM </div> <div data-bbox="109 250 465 477"> 217 East Redwood Street 9th Floor Baltimore, MD 21202 410-767-3400 1-877-209-5883 FAX 410-333-6643 Web site: www.visitmaryland.org </div> <div data-bbox="109 530 401 564"> ADMINISTRATION </div> <div data-bbox="109 587 440 732"> Dennis M. Castleman Director 410-767-6266 dcastleman@visitmaryland.org </div> <div data-bbox="158 750 472 895"> David Bahlman Deputy Director 410-767-6299 dbahlman@visitmaryland.org </div> <div data-bbox="158 913 451 1058"> Sue Kenney Project Manager 410-767-5324 skenney@visitmaryland.org </div> <div data-bbox="158 1076 448 1221"> Denise Konopacki Assistant Director 410-767-6273 denisek@visitmaryland.org </div> <div data-bbox="158 1239 505 1384"> Denise Zimmerman Administrative Specialist 410-767-6293 dzimmerman@visitmaryland.org </div> <div data-bbox="158 1402 457 1533"> Spencer Franklin Research Analyst 410-767-6285 sfranklin@visitmaryland.org </div> <div data-bbox="109 1581 358 1655"> PRODUCT DEVELOPMENT </div> <div data-bbox="109 1676 381 1857"> Marci Ross Assistant Director Product Development 410-767-6286 mross@visitmaryland.org </div> <div data-bbox="158 1875 494 2020"> Anne Kyle Product Development Manager 410-767-0696 akyle@visitmaryland.org </div>	<div data-bbox="660 105 964 140"> WELCOME CENTERS </div> <div data-bbox="660 146 820 208"> Bay Country 410-758-6803 </div> <div data-bbox="660 215 820 277"> BWI 410-691-2878 </div> <div data-bbox="660 284 893 346"> Chesapeake House 410-287-2313 </div> <div data-bbox="660 353 853 415"> Crain Memorial 301-259-2500 </div> <div data-bbox="660 422 820 484"> I-70 West 301-293-4161 </div> <div data-bbox="660 491 820 553"> I-70 East 301-293-2526 </div> <div data-bbox="660 560 820 622"> I-95 South 301-490-2444 </div> <div data-bbox="660 629 820 691"> I-95 North 301-490-1333 </div> <div data-bbox="660 697 820 759"> Sideling Hill 301-678-5442 </div> <div data-bbox="660 766 820 828"> State House 410-974-3400 </div> <div data-bbox="660 835 820 897"> US 13 North 410-957-2484 </div> <div data-bbox="660 904 820 966"> US 15 South 301-447-2553 </div> <div data-bbox="660 973 957 1035"> Youghiogheny Overlook 301-746-5979 </div> <div data-bbox="565 1069 962 1104"> SALES AND MARKETING </div> <div data-bbox="611 1125 939 1269"> Pete Chambliss Assistant Director 410-767-6294 pchambliss@visitmaryland.org </div> <div data-bbox="660 1288 945 1469"> Rich Gilbert Sales and Marketing Sr. Manager 410-767-6288 rgilbert@visitmaryland.org </div> <div data-bbox="660 1487 936 1669"> Joseph Guido Sales and Marketing Manager 410-767-6276 jguido@visitmaryland.org </div> <div data-bbox="660 1687 950 1836"> Sandy Stilling Administrative Assistant 410-767-6270 sstilling@visitmaryland.org </div> <div data-bbox="660 1887 948 1958"> SALES AND INTERNATIONAL REP </div> <div data-bbox="660 1976 936 2126"> Gerda De Roy-Arnauts 0113227576390 Continental Europe gerda.arnauts@skynet.be </div>	<div data-bbox="1017 105 1336 176"> ADVERTISING AND COMMUNICATIONS </div> <div data-bbox="1064 199 1410 344"> Liz Fitzsimmons Assistant Director 410-767-6331 lfitzsimmons@visitmaryland.org </div> <div data-bbox="1113 362 1396 509"> Kat Evans Traffic Coordinator 410-767-6330 kevans@visitmaryland.org </div> <div data-bbox="1113 551 1422 585"> PUBLIC RELATIONS </div> <div data-bbox="1113 608 1386 789"> Camila Clark Public Relations & Promotions Manager 410-767-6298 cclark@visitmaryland.org </div> <div data-bbox="1113 808 1410 989"> Johanna Colburn Public Relations Associate 410-767-6279 jcolburn@visitmaryland.org </div> <div data-bbox="1113 1007 1419 1154"> Connie Yingling Media Coordinator 410-767-6329 cyingling@visitmaryland.org </div> <div data-bbox="1113 1196 1353 1232"> PUBLICATIONS </div> <div data-bbox="1113 1253 1407 1398"> Claude Brooks Publications Design 410-767-6274 cbrooks@visitmaryland.org </div> <div data-bbox="1113 1451 1353 1522"> INFORMATION TECHNOLOGY </div> <div data-bbox="1113 1545 1415 1726"> Nora Keenan Information Technology Manager 410-767-6275 nkeenan@visitmaryland.org </div> <div data-bbox="1113 1744 1379 1928"> Greg Bird Information Technology Assistant Manager 410-767-6292 gbird@visitmaryland.org </div> <div data-bbox="1113 1947 1412 2093"> Vanessa Jenkins Database Specialist 410-767-6282 vjenkins@visitmaryland.org </div>
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Maryland Tourism Development Board		Destination Marketing Organizations
<p>Mr. Steven H. Adler Historic Savage Mill 8600 Foundry Street Savage MD 20673-9512 410-792-0958 X229 FAX 410-792-4520 steveadler@comcast.net</p> <p>Ms. Ruth Beitzel German Village at Fantasy Valley 2287 Rock Lodge Road Accident MD 21520-1107 301-387-6950 FAX 301-746-6197 rbeitzel@verizon.net</p> <p>Mr. Charlie Birney Atlantic Golf 3168 Braverton Street Edgewater MD 21037 443-951-2000 FAX 443-951-2020 cbirney@thebrickcompanies.com</p> <p>Mr. Gerald Donovan Rod 'N Reel Restaurant PO Box 99 Chesapeake Beach MD 20732 410-257-2735 FAX 301-855-5350 gwd@cbresortspa.com</p> <p>Ms. Dorothy Hamill PO Box 39549 Baltimore, MD 21212 Phone & FAX 443-267-0198 dot@dorothyhamill.com</p> <p>Mr. Michael James Carousel Resort Hotel & Condominiums 11700 Coastal Highway Ocean City MD 21842 410-520-2300 FAX 410-520-2466 michael.james@carouselhotel.com</p> <p>Mr. David Meloy Merit Hotel Group 38 Chesapeake Landing Annapolis MD 21403-2615 410-990-1775 FAX 410-990-1776 dmeloy@msn.com</p>	<p>Mr. Bill Ripken Ripken Baseball 873 Long Drive Aberdeen MD 21001 410-297-9292 FAX 410-297-6653</p> <p>Ms. Alice Torriente African American Cultural Tours, LLC 10 East Lee Street Suite 707 Baltimore MD 21202 410-727-0755 FAX 410-727-0755 ourtours@aol.com</p> <p>Mr. Sergio V. Vitale Aldo's Ristorante Italiano 306 South High Street Baltimore MD 21202 410-727-0700 FAX 410-625-3700 s_vitale@yahoo.com</p> <p>Legislative Appointees:</p> <p>Senator John C. Astle Senate of Maryland 123 James Senate Office Building Annapolis MD 21401-1991 410-841-3578 FAX 410-841-3156 john_astle@senate.state.md.us</p> <p>Senator Nancy Jacobs Senate of Maryland 403 James Senate Office Bldg Annapolis MD 21401-1991 410-841-3158 FAX 410-841-3400 nancy_jacobs@senate.state.md.us</p> <p>Delegate Ann Marie Doory Maryland House of Delegates 231 Lowe House Office Building Annapolis MD 21401-1991 410-841-3476 FAX 410-841-3558 annmarie_doory@house.state.md.us</p>	<p>ALLEGANY COUNTY Allegany County Department of Tourism Western Maryland Station 13 Canal Place Cumberland, MD 21502 1-800-425 2067 301-777-5134 301-777-5137 mdstaff@mdmountainside.com mdmountainside.com</p> <p>ANNAPOLIS & ANNE ARUNDEL COUNTY Annapolis & Anne Arundel County Conference & Visitors Bureau 26 West Street Annapolis, MD 21401 410-280-0445 FAX 410-263-9591 info@visitannapolis.org visit-annapolis.org</p> <p>BALTIMORE CITY Baltimore Area Convention and Visitors Association 100 Light Street 12th Floor Baltimore, MD 21202 1-877-BALTIMORE 410-659-7300 FAX 410-727-2308 info@baltimore.org baltimore.org</p> <p>BALTIMORE COUNTY Baltimore County Conference and Visitors Bureau PO Box 5426 Lutherville, MD 21094-5426 1-877-STAY-N-DO 410-296-4886 FAX 410-296-8618 info@visitbacomd.com visitbacomd.com</p> <p>CALVERT COUNTY Department of Economic Development and Tourism 205 Main Street, 2nd Floor Prince Frederick, MD 20678 1-800-331-9771 410-535-4583 301-855-1880 (DC) FAX 410-535-4585 info@ecalvert.com ecalvert.com</p>

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16 N. Second Street
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Denton, MD 21629
410-479-0655
FAX 410-479-5563
tourism@cedconline.com
tourcaroline.com

CARROLL COUNTY

Carroll County Office of Tourism
210 E. Main Street
Westminster, MD 21157
1-800-272-1933
410-848-1388
FAX 410-876-1560
cctourism@ccg.carr.org
carrollcountytourism.org

CECIL COUNTY

Cecil County Tourism
1 Seahawk Drive
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FAX 410-996-6279
Email: dgraham@ccgov.org
SeeCecil.org

CHARLES COUNTY

Charles County Office of Tourism
PO Box 2150
LaPlata, MD 20646
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301-870-3000 (DC)
FAX 301-638-2408
Email: tourism@charlescounty.org
visitcharlescounty.com

DORCHESTER COUNTY

Dorchester County Tourism
2 Rose Hill Place
Cambridge, MD 21613
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info@tourdorchester.org
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FREDERICK COUNTY

Tourism Council of
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Frederick, MD 21701
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301-228-2888
FAX 301-644-4044
tourism@fredco-md.net
fredericktourism.org

GARRETT COUNTY

Garrett County Chamber of
Commerce, Inc.—The Home of
Deep Creek Lake
15 Visitors Center Drive
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FAX 301-387-2080
info@garrettchamber.com
visitdeepcreek.com

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FAX 410-313-1902
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VisitHowardCounty.com

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Kent County Office of Tourism
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MONTGOMERY COUNTY

Conference and Visitors Bureau of
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VisitMOCO@aol.com
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PRINCE GEORGE'S COUNTY

Prince George's County Conference
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FAX 301-925-2053
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wicomicotourism.org

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FAX 410-289-0058
ask@ococean.com
ococean.com



Robert L. Ehrlich, Jr., Governor
Michael S. Steele, Lt. Governor

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Aris Melissaratos, Secretary

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