

TOURISM MARKETING & DEVELOPMENT PLAN



fiscal year

2010

⋮ *Maryland Tourism Development Board*
⋮ *and the Office of Tourism Development*



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and the Office of Tourism Development
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Marketing & Development Plan
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Executive Director's Message

Dear Tourism Partner:

On behalf of the staff of the Office of Tourism Development, I am proud to share with you our tremendous accomplishments achieved of the past year.

The Department of Business and Economic Development (DBED) underwent a reorganization under the leadership of our new Secretary, Christian Johansson, who clearly defined four core goals. As part of the reorganization, each division in DBED was asked to develop an FY'10 Action Plan in support of these four goals. Detailed below are the Office of Tourism Development (OTD) Goals and Action Plan Key Deliverables:

Goal 1: Sustain and improve jobs in the tourism industry

Key Deliverable: Finalize FY 2011-2015 Maryland Tourism Development Board (MTDB) Five Year Strategic Plan

Goal 2: Sustain and increase economic impact from tourism

Key Deliverables:

- Monitor tourism sales tax codes: adjust marketing efforts if warranted
- Complete "Welcome Center Efficiency and Effectiveness Study"
- Open the enhanced I-70 Welcome Centers, including state of-the-industry informational displays
- Advance plans for 12 signature War of 1812 Bicentennial events

Goal 3: Improve awareness and enhance the positive perception of Maryland

Key Deliverables:

- Create new Interactive Services Unit, charged with enhancing the division's web, social media and mobile applications
- Improve the completeness, timeliness and ease of transmission of event and attractions information
- Craft new research-driven consumer marketing campaign
- Complete Phase II of the Maryland Byways research study
- Refine county cooperative grant program
- Launch Maryland Green Travel certification program

Goal 4: Leverage investment in Maryland's unique quality of life assets

Key Deliverables: Administer \$7 million in projects assisted with \$5.6 million in Federal Highway Administration Scenic Byway Grants for the Civil War Sesquicentennial, Harriet Tubman Centennial and the War of 1812 Bicentennial

These goals and the resulting action plan deliverables guided the development of this Fiscal 2010 Marketing and Development Plan as well as the recently approved Maryland Tourism Development Board Five-Year Strategic Plan for Fiscals 2011-2015.

I join Maryland Tourism Development Board Chair, Greg Shockley, in encouraging you to review the OTD Events Calendar as well as the partner marketing and advertising opportunities detailed in this plan. We all need to market aggressively during these challenging times—and working collaboratively is one way to make all our marketing dollars go further.

Once again, I thank all of you for your continued commitment to our industry. I look forward to working together in the coming year to market Maryland as the premier tourism destination in the region.

All the best,

Margot A. Amelia
Executive Director
Maryland Office of Tourism Development



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

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

Maryland Tourism Development Board Chairman's Message

Dear Tourism Industry Partner:

As the recently elected chair of the Maryland Tourism Development Board, I am proud of this body's continuing work with the team at the Maryland Office of Tourism, and in particular the recently approved Five-Year Strategic Plan. I am pleased to present the Tourism Marketing and Development Plan for Fiscal Year 2010, which reflects the goals and strategies of the Five-Year Strategic Plan.

The Maryland Tourism Development Board recently approved the following Vision Statement as part of the Five Year Strategic Plan:

The Maryland Office of Tourism Development Vision 2015: Maryland's tourism industry, and the efforts of the Office of Tourism Development, shall be recognized as a vital economic engine for the State of Maryland, generating revenues, sustaining jobs, improving the State's image and leveraging investments in Maryland's tourism assets. The Office of Tourism Development will pursue its mission—increasing tourism expenditures—with a focus on accountability and results.

Governor Martin O'Malley recognizes that Maryland's tourism industry continues to be one of the bright spots in our economy, continuing to grow jobs and boost tax revenues. In FY2009, Maryland's tourism industry outpaced national economic trends, with increases in hotel room demand, tax revenue and jobs versus the prior year.

To comply with the accountability-related goals of Governor O'Malley's administration, the Office of Tourism Development aligns this marketing plan to performance-based success measurements. Such standards provide both our board and the Office of Tourism Development with the tools to better quantify marketing successes, while providing a road map for attaining higher returns on future marketing efforts. I am particularly impressed with the success of the new initiatives that were launched in the FY'09 Marketing Plan:

- We completed an extensive quantitative target audience study that helped determine effective selling messages.
- We focused greater emphasis on public relations outreach in order to secure more third-party editorial focus – generating \$6.6 million in media value, an increase of 54 percent from FY'08. A new communications initiative – the monthly "Maryland Spotlight" – launched in May, and has already generated significant press coverage.
- Given the importance of the web as a travel planning tool, the tourism web site now includes a web effectiveness survey, which is helping staff prioritize new web content. The number of unique visitors to the tourism web site increased by more than 26 percent in FY '09.
- OTD was just recently awarded close to \$5.6 million by the Federal Highway Administration in response to a strategically developed application to the National Scenic Byways Program for the development and marketing of upcoming commemorations.

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

Sincerely,

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



Destination Situation Analysis

TRAVEL INDUSTRY TRENDS

The New York Times reported in October 2009 that as the economy begins to shift gears from dismal to slightly improved, the travel industry sees some reason for hope—but not much. The U.S. Travel Association expects travel spending in the U.S. to decline by nearly 9 percent this year, to \$705 billion, which includes domestic business and leisure travel as well as spending by international visitors. Spending is expected to increase by 6 percent in 2010, but that does not make up for the large dip in 2009. The industry is bracing for more modest spending on travel for years to come. One factor keeping optimism in check is tight controls on business travel.

The sinking U.S. economy forced many Americans to consider cutting back on or giving up the family vacation. A February 2009 *USA TODAY*/Gallup Poll found that 58 percent of people who normally take an annual vacation away from home will reduce their vacation spending this year.

Taking weekend trips and sticking closer to home were two responses to how the economy is changing the way people travel. Maryland, due to its geographic location, should benefit from these changing travel patterns. And home port cruising is making a comeback, as more people are interested in being able to drive to their port of departure. The Port of Baltimore has seen tremendous growth, with four cruise lines and year-round departures.

A July 2009 “State of the American Traveler Survey” reported that the top two reasons for cutting back on leisure travel were personal financial reasons (66.4 percent) and that gasoline was too expensive (56.5 percent). This survey also reported that 27 percent of Americans were planning to increase leisure travel spending in the next 12 months.

Tourism marketers are offering discounts, freebies and other marketing ploys to draw visitors who might be reluctant to open their purses. It is imperative that Maryland destinations market aggressively to maintain, if not grow, their market share in these difficult economic times.

MARYLAND VISITOR STATISTICS

For calendar year 2008, D.K. Shifflet & Associates reports that Maryland hosted an estimated 28.08 million domestic visitors, up 3.2 percent from 2007. More than 75 percent, or 20.98 million, were leisure visitors, and the remaining 25 percent, or 7.1 million, were business travelers.

Trips were almost evenly split between overnights and day trips, with more than 14 million day trippers and nearly 14 million overnight travelers.

Maryland Person-trips Visitor Volume Estimates (in Millions)

	2008	2007	2006
TOTAL	28.08	27.20	28.08
Business	7.10	6.61	7.15
Leisure	20.98	20.59	21.13
Overnight	13.86	13.61	13.58
Day trip	14.22	13.59	14.70

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

A five-year data analysis indicates that 40 percent of all trips are day leisure trips, and 35 percent are overnight leisure. Of the remaining 25 percent that reflect business travel, day and overnight business trips are evenly split.

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



WELCOME

TRENDS AND COMPARISONS

National travel volume declined from 2007. Specifically, total domestic U.S. visitor volume, as measured in person-trips, fell 2.6 percent from 2007 to 2008. This decrease was driven by decreases in day trips and overall business trips. Leisure travel continues to grow and now represents more than 75 percent of all person trips; overnight and day trips are relatively evenly split within the leisure travel segment.

Maryland outperformed both the national and regional trends, with the largest growth in Maryland's business segment, resulting in net gains in all overnight stays.

Maryland's surrounding states saw declines from 2007. Delaware and West Virginia both saw dramatic declines from 2007. It is important to note that Pennsylvania opened casinos in late 2006, which may have caused a decline to those two states.

Percent Change in Person-Trip Volume 2007-2008

Travel Segment	U.S.	MD	DE	PA	VA	WV
Total	-2.57	3.23	-12.40	-0.16	-4.95	-8.11
Business	-4.59	7.36	-26.22	-8.10	-12.15	-14.28
Leisure	-1.89	1.91	-7.99	1.95	-2.24	-6.89
Day	-3.52	2.40	-25.73	-1.18	-6.61	-13.98
Overnight	-1.60	4.10	7.73	1.00	-3.38	1.36

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

Maryland Visitor Profile Trends

The top ten tourism activities in Maryland are similar to the U.S. overall, with dining, shopping, sightseeing and entertainment ranked in the top four. Beach/waterfront ranks fifth in Maryland (seventh nationally) and museum/art exhibit and festival/craft fair rank higher in Maryland than in the U.S.

Top Ten Tourism Activities

U.S.	Maryland
Dining	Dining
Shopping	Shopping
Entertainment	Sightseeing
Sightseeing	Entertainment
Gamble	Beach/Waterfront
Night Life	Nightlife
Beach/Waterfront	Museum/Art Exhibit
Parks (national/state)	Parks (national/state)
Theme/Amusement Park	Festival/Craft Fair
Attend Sports Event	Attend Sports Event

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

The top two destinations visited in Maryland are Baltimore and Ocean City. The chart below details number of visitors, average travel party size, trip length, spending per trip, percent of day trips, and top feeder markets for those two destinations and for Maryland overall.

Maryland and Top Two City Destination Facts for 2008

	Maryland	Baltimore	Ocean City
Estimated tourists	28.08 million	9.91 million	2.72 million
% of total Maryland tourists	100%	35.3%	9.7%
Average travel party size	2.2	2.3	3.2
Average trip length in days	1.8	1.4	3.7
Average Maryland spending per trip	\$313	\$304	\$867
% of day trips to destination	50.6%	49.8%	15.7%
Top 3 designated marketing areas of origin	Washington, DC (25.1%) Baltimore (13.6%) Philadelphia (11.5%)	Washington, DC (31.9%) Philadelphia (19.1%) New York, NY (5.7%)	Baltimore, MD (41.7%) Washington, DC (13.1%) Philadelphia (11.2%)

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



Lodging Sector Trends

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

The following lodging measurements are detailed below:

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

Calendar Year 2008 Analysis

Demand for Maryland's lodging was up slightly (0.7 percent), outperforming both the region and the nation, both which declined 1.6 percent from 2007. Maryland's room supply grew by 5.6 percent from 2007; Maryland's room supply growth was double the national growth and more than 50 percent higher than the regional growth.

Average room rates for the state as a whole increased 2.4 percent to \$117.88. Maryland's room rates exceeded the national average, with room rate growth on par with the regional growth rate. Room revenues, which are tied to room demand and room rates, declined 2.3 percent from 2007. Maryland's occupancy rates, which reflect changes in both the supply and demand for rooms, averaged 59.5 percent, a decline of 4.6 percent from 2007.

The following table details the five metrics for the U.S., Maryland, the Washington, DC/Maryland/Virginia/Delaware region and the 10 STR pre-defined Maryland regions. The 10 regions break down as follows:

- Baltimore City—aligns closely with Baltimore City.
- Baltimore Suburbs—aligns closely with Baltimore County.
- BWI Airport/Annapolis—aligns closely with Anne Arundel County.
- Baltimore Area—includes Harford, Carroll, Howard and Queen Anne's counties.
- Cecil County—aligns closely with Cecil County.
- West/Hagerstown—includes Washington, Allegany and Garrett counties.

Chesapeake/Ocean City—includes St. Mary's, Kent, Caroline, Talbot, Dorchester, Wicomico, Somerset and Worcester counties.

Bethesda/College Park—includes parts of Montgomery and Prince George's counties.

South and East—includes Calvert and Charles counties and the rest of Prince George's County.

Frederick/Rockville—includes Frederick County and the rest of Montgomery County.

2008 Lodging Performance Comparison

2008 Lodging Performance Comparison							
Calendar Year 2008	Room Demand Percent Change	Room Supply Percent Change	Average Room Rate	Average Room Rate Percent	Room Revenue Percent Change	Occupancy	Occupancy Percent Change
Segment							
United States	-1.6%	2.7%	\$ 106.55	2.4%	-1.9%	60.4%	-4.2%
Maryland	0.7%	5.6%	\$ 117.88	2.4%	-2.3%	59.5%	-4.6%
DC-MD-VA-DE Region	-1.6%	3.6%	\$ 120.80	2.5%	0.1%	60.1%	-5.1%
MD regions							
Baltimore City	0.1%	8.4%	\$ 155.71	-2.6%	-10.1%	60.5%	-7.6%
Baltimore Suburbs	-6.5%	2.1%	\$ 94.29	-1.2%	-9.6%	57.9%	-8.5%
BWI Airport/Annapolis	3.1%	6.2%	\$ 111.34	-2.9%	-5.8%	65.3%	-2.9%
Baltimore Area	-3.8%	1.8%	\$ 91.74	-1.6%	-7.0%	59.5%	-5.5%
Cecil County	-15.2%	0.0%	\$ 73.95	0.9%	-14.4%	50.0%	-15.2%
West/Hagerstown	-3.0%	-0.4%	\$ 77.91	3.6%	0.9%	55.5%	-2.6%
Chesapeake/Ocean City	-5.2%	1.4%	\$ 126.98	2.4%	-4.4%	53.5%	-6.6%
Bethesda/College Park	-4.4%	-3.6%	\$ 138.46	2.5%	1.7%	65.3%	-0.8%
South and East	26.6%	32.0%	\$ 122.92	23.1%	18.1%	58.7%	-4.1%
Frederick/Rockville	1.4%	0.9%	\$ 108.86	3.5%	4.0%	62.3%	0.5%

Source: Smith Travel Research, Inc.



First Half 2009 Analysis

Unlike most visitor data, the STR lodging data is available on an almost real-time basis. This is extremely helpful from a destination situational analysis basis as it's important to continuously track trends so that we can make appropriate recommendations and adjustments.

Lodging room demand statewide was up 0.4 percent year-to-date, compared to the same six-month period in 2008. Maryland's demand outperformed the nation and the region. The number of rooms available (room supply) grew by 5.4 percent, reflecting a continued increase in the building or expansion of new rooms across the state. This growth was nearly 70 percent higher than the national average, and growth predominantly occurred in Baltimore City, BWI Airport/Annapolis and Maryland South & East.

Average room rates for the State as a whole declined 3.2 percent to \$112.19. Rates in Maryland dropped less than the national average, but more than the regional composite. Room revenues, which are tied to room demand and room rates, are down 7.8 percent compared to the same six-month period in 2008; while more rooms have been sold, the lower room rates impacted revenues. Nationally, room revenues declined 18.7 percent.

Occupancy rates, which reflect changes in both supply and demand for rooms, averaged 57 percent, down 4.8 percent from the 2008 six-month period. While occupancy rates are down across the U.S. overall, Maryland's occupancy has declined less than the U.S. and the region, at 10.9 percent and 6.2 percent respectively.

January-June 2009 Lodging Performance Comparison

January-June 2009 Lodging Performance Comparison							
Calendar Year 2008	Room Demand Percent Change	Room Supply Percent Change	Average Room Rate	Average Room Rate Percent	Room Revenue Percent Change	Occupancy	Occupancy Percent Change
Segment							
United States	-8.0%	3.2%	\$ 98.66	-8.7%	-18.7%	54.6%	-10.9%
Maryland	0.4%	5.4%	\$ 112.19	-3.2%	-7.8%	57.0%	-4.8%
DC-MD-VA-DE Region	-2.2%	4.2%	\$ 118.80	-2.6%	-4.8%	57.4%	-6.2%
MD regions							
Baltimore City	2.3%	10.0%	\$ 142.34	-8.5%	-15.0%	58.0%	-7.1%
Baltimore Suburbs	-4.8%	1.6%	\$ 90.91	-5.6%	-11.4%	55.1%	-6.2%
BWI Airport/Annapolis	3.5%	4.1%	\$ 102.47	-8.7%	-9.2%	65.4%	-0.5%
Baltimore Area	-2.4%	1.4%	\$ 88.77	-4.7%	-8.3%	57.4%	-3.8%
Cecil County	-9.4%	0.0%	\$ 70.11	-6.4%	-15.2%	44.9%	-9.4%
West/Hagerstown	-2.6%	1.0%	\$ 77.20	2.6%	-1.0%	51.7%	-3.5%
Chesapeake/Ocean City	-6.7%	1.4%	\$ 108.24	-2.3%	-10.1%	45.9%	-8.0%
Bethesda/College Park	-2.2%	0.5%	\$ 131.91	-6.9%	-9.4%	65.6%	-2.7%
South and East	14.4%	21.6%	\$ 132.21	10.0%	3.5%	57.6%	-5.9%
Frederick/Rockville	-1.6%	3.1%	\$ 106.28	-3.8%	-8.1%	61.0%	-4.5%

Source: Smith Travel Research, Inc.



MARYLAND VISITOR SPENDING

Spending by Maryland travelers increased in all travel categories from 2006 to 2007 (the last full year that data is available). Overall travel expenditures in Maryland increased nearly 3 percent from 2006, from \$13.2 billion to more than \$13.6 billion.

Travel Expenditures (\$ millions) Source: IHS Global Insight	2007	2006	2005
Transportation	\$ 3,534.70	\$ 3,450.50	\$ 3,268.10
Food	\$ 3,344.90	\$ 3,295.20	\$ 3,132.40
Lodging	\$ 2,408.30	\$ 2,303.10	\$ 2,194.00
Shopping	\$ 2,599.00	\$ 2,477.10	\$ 2,353.70
Entertainment	\$ 1,743.30	\$ 1,714.5	\$ 1,652.40
TOTAL	\$13,630.20	\$13,240.40	\$12,600.50

PRODUCT ANALYSIS AND ACCESS

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

Access

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

2009 Image Benchmark Study

The Maryland Tourism Development Board recommended at their Strategic Planning Session in September 2008 that OTD create and implement a destination marketing program that included a brand identity/positioning platform that captures the essence of the Maryland destination experience.

Based upon this direction, OTD engaged Longwoods International to conduct consumer research into Maryland's image, measure Maryland's advantages and weaknesses against regional competitors, inquire about product delivery and identify motivating factors for visitors to choose the state as a destination. This study included two components: (1) Image benchmarking in the Baltimore; Pittsburgh; Harrisburg, Lebanon, Lancaster and York, PA; Washington, DC; and New York advertising areas; and (2) Analysis of trip trends to determine growth potential.

Key Findings

- Maryland has an overall positive image.
- Maryland is recognized for its waterfront, beaches, unique food, and appealing climate.
- Maryland is considered a safe, relaxing, affordable regional destination.
- Maryland is viewed as much as a day trip as an overnight stay destination.
- A small number of people spontaneously mentioned Maryland among all the places they might enjoy visiting in the United States.

NOTE: *Despite positive overall associations with food, water-related activities, safe/relaxing environment, and temperate climate, Maryland trails competitors in the region on top motivating factors, which consumers use to choose a destination, such as excitement, sightseeing and perceived popularity. This learning will help focus Maryland tourism marketing on communicating that Maryland is an exciting, fun and must-see place that offers a sense of adventure – all consumer “hot buttons,” according to Longwoods International Image Benchmark Study recommendations.*

- Respondents who visited in the last three years rated their trip higher than they expected.

Recommendations

The analysis of trips taken to Maryland indicated that Maryland should target those consumers that select touring and resort-type vacations because they stay longer and spend more than other types of visitors, resulting in a greater



net economic benefit to the State. Both segments represent regional growth potential, have disposable income, and have interests that are compatible with the variety of natural beauty, historic sites, interesting cities, towns and villages Maryland offers.

Viable consumer positioning statements were developed and will be concept-tested. One example is as follows:

Maryland is an exhilarating coastal escape that will exceed expectations. The waters of the Atlantic Ocean and the Chesapeake Bay (and its tributaries) are just the beginning of a vacation packed with fun and excitement. Our shores will show you breathtaking vistas, aquatic adventures, mouthwatering seafood and interesting cities and towns.

TRAVEL DECISION MAKER/TARGET AUDIENCE DEFINITION

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

While the average travel party size is 2.15 persons in Maryland, 24 percent of those trips are taken with children. The media purchased for the spring/summer 2009 campaign targeted women both with and without children, in order to reach a wider pool of prospective travelers.

This audience is further defined by their special interests in Maryland's travel products, which may include but are not limited to: Civil War; the Underground Railroad; the Star-Spangled Banner; Maryland and America's Byways; other cultural heritage programs; outdoor recreation and sporting events; and multicultural sites/events. The spending for marketing to the multicultural audience comprises 13 percent of all advertising, development, and sales and marketing activities.

Another important component of Maryland's audience is the travel trade. This audience consists of group travel leaders, meeting planners, association

managers, tour operators, travel agents and sporting event managers. Generally, these are not mass-market media audiences but are targeted through domestic and international sales programs.

PRIMARY FEEDER MARKETS

The primary geographic market is generally described as the 400-mile radius from the geographic center of the State, but principally within the mid-Atlantic states of Pennsylvania, New Jersey, Virginia, Delaware and West Virginia, as well as parts of New York, Ohio, Indiana and North Carolina.

Marylanders have historically represented the largest number of Maryland tourists. In 2008, for instance, 28 percent of all travelers to Maryland were from within the state, compared to 16 percent from Virginia and 14 percent from Pennsylvania. Therefore, given budget constraints and the cost-prohibitive nature of the New Jersey-New York media markets, recent broadcast media purchases have focused on the Washington, DC market (which represented 25 percent of travelers to Maryland in 2008) Baltimore (which represented 14 percent) and Philadelphia (which represented 12 percent). Internet and print media still target the broader 400-mile geography.

SECONDARY FEEDER MARKETS

However, distant secondary markets, including Toronto and Montreal in Canada, the European markets of England, Germany, France, the Benelux region and selected markets in Latin America, offer tremendous growth opportunities and a higher-per-capita expenditure because of the increased length-of-stay. Therefore, OTD will continue to concentrate on building this increasingly important consumer base through sales programs and promotions, often in conjunction with Capital Region USA (CRUSA), our collaboration marketing alliance with Washington, DC and Virginia, as well as with the members of the Maryland International Marketing Associates.



COMPETITIVE ANALYSIS

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

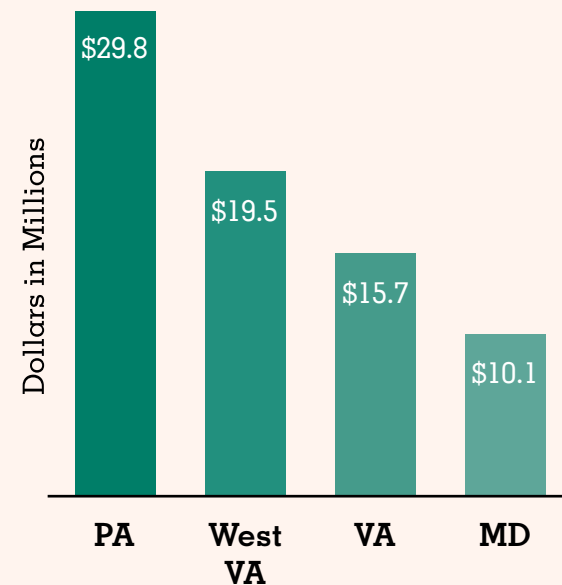
The U.S. Travel Association (formerly known as The Travel Industry Association of America) reported that in 2008, domestic and international travelers spent \$772.9 billion in the U.S. In the race for consumer travel dollars, more than \$768 million is spent by state tourism offices to encourage travelers to choose their particular destination.

Maryland's closest regional competitors – Pennsylvania, West Virginia and Virginia reported FY'09 budgets of \$29.8 million, \$19.5 million and \$15.7 million respectively. Maryland's FY'09 reported budget was \$10.1 million.

In our region, not only are states investing in tourism advertising and promotion, but cities are increasing their spending on advertising as well. Philadelphia historically spends at least \$10 million annually in leisure marketing efforts. New York City launched its "This is New York City" global marketing campaign in 2008 with a budget of \$30 million (\$4.75 million in cash and \$25.5 million in city-bartered media assets). Destination DC launched their new campaign, "Create your own Power Trip," in 2008 after spending more than a year in brand strategy development to determine their most compelling marketing platform.

Obviously, the competition for tourism, convention and investment dollars is relentless. This competitive marketplace means that OTD has to work more creatively to continue to build upon its recent successes in generating interest in Maryland tourism. We need to continue to track performance measurements, and adjust marketing strategies accordingly. But, like other destinations, the time is right to invest in a destination marketing program that includes a brand identity/positioning platform that captures the essence of the Maryland destination experience so we can focus our energies on the most valuable prospects with the most compelling messages.

FY 2009 Regional Tourism Budgets





Objectives & Strategies by Marketing Program

MARYLAND TOURISM DEVELOPMENT BOARD

Office of Tourism Development Administrative Management

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

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

Objectives:

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

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

Key Strategies for Fiscal 2010:

Finalize and implement the Five-Year Strategic Plan, including the following strategies and tactics:

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

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

Review best practices in state tourism grant programs and ensure grant guidelines expand commitments to promoting the Maryland brand in preparation for the increased funding in FY2011.

Recognize, document and promote best practices, specifically in regards to Welcome Center and call center operations, to ensure the most effective and efficient programs.



OFFICE OF TOURISM DEVELOPMENT

Administrative/Management

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

Objectives:

Manage and monitor the OTD staff, prioritizing and balancing the workload in order to maximize efficiency and effectiveness. Ensure that sufficient staff is deployed to accomplish the mission and the recommendations of the DBED FY'10 Action Plan.

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

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

Key Strategies for Fiscal 2010:

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

Finalize FY2011-2015 Five Year Maryland Tourism Development Board Strategic Plan, including regional meetings to ensure stakeholder input and buy-in.

Maintain membership and active leadership in state and national organizations.

Maintain ongoing relationships with Maryland Association of Destination Marketing Organizations (MDMO), Arts and Entertainment Districts, and Maryland Heritage Areas to ensure proper state and local coordination.

Foster interagency cooperation between local, state, and national agencies.



COMMUNICATIONS AND MARKETING SERVICES

Domestic Advertising – Media and Production

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

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

Objectives:

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

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

Key Strategies for Fiscal 2010:

Craft new research-driven marketing campaign to promote Maryland as a visitor destination of choice.

Utilize learning from the image and awareness study, and target the touring and resort traveler. Utilize existing and new media strategies to target these prospective visitors.

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

Continue to leverage the State's marketing dollars by offering strategic advertising co-operative programs.

Begin the process to institute an advertising effectiveness study to ensure that Maryland's marketing message is placed in the proper media outlets and that the creative is raising awareness of and interest in Maryland as a travel destination.





WELCOME

COMMUNICATIONS AND MARKETING SERVICES

Public Relations

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

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

Objectives:

Secure "Destination Maryland" media placements that have a value of at least \$7.5 million.

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

Key Strategies for Fiscal 2010:

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

Identify action plan to launch new research-driven marketing campaign in Spring 2010.

Utilize public relations counsel to expand national publicity efforts.

Work with both in-state media outlets and travel editorial professionals in Maryland's primary and secondary feeder markets.

Continue to work with CRUSA's international representatives and public relations firms as staffing and budget allow.





COMMUNICATIONS AND MARKETING SERVICES

Publications

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

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

Objectives:

Utilize learning from Image and Awareness Study to retool publications thematically.

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

Produce high-quality communications vehicles that support priority visitor experiences and other marketing initiatives, such as Maryland Green Travel. Work with private sector partners to offset expenditures and increase distribution (*Golf Guide* and *Field Trip Guide*).

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

Key Strategies for Fiscal 2010:

Publication	Audience	Distributed	Quantity
<i>This Month in Maryland e-newsletter</i>	Consumer	Monthly	Goal: 50,000
<i>Maryland Field Trip and Teachers' Guide</i>	Educators	September 2009	3000
<i>Star Spangled Banner Trail Map</i>	Consumer	September 2009	75,000
<i>Profile Sheets</i>	Tour & Travel Trade	October 2009	500
<i>Maryland Calendar of Events</i>	Consumer	December 2009	250,000
<i>Golf Guide Annual</i>	Consumer	January 2010	50,000
<i>African-American Guide</i>	Consumer	February 2010	50,000
<i>Charms of the Chesapeake</i>	Consumer	February 2010	75,000
<i>Destination Maryland</i>	Consumer	March 2010	250,000





INTERACTIVE SERVICES

Web Site Development/Maintenance, E-Marketing & New Media Strategies

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

Objectives:

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

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

Increase and enhance use of media targeted at more technologically savvy consumers.

Key Strategies for Fiscal 2010:

Continue to investigate new web-based and technology-based marketing opportunities, and integrate them into the visitmaryland.org web site.

Utilize learning from the consumer web site effectiveness survey to refresh content and technology, as appropriate.

Solicit user-generated content/third-party recognition – adds content to web site, increases web traffic and validates Maryland product (e.g. Flickr photo contests, Blogger, etc.).

Continue to add Twitter followers, engaging them with viable tourism opportunities.

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

Explore new products (applications, games, etc.) that are aligned with OTD priorities and/or programs (maps/trails, narrated tours, etc.).

Inquiry Fulfillment: Database, Telemarketing and Fulfillment Services

Respond to all tourism inquiries with the highest level of customer service, delivering the services and/or resources that the customer requires.

Maintain the most up-to-date travel information resources for the OTD web site, Call Center, Welcome Centers and publications.

Objectives:

Respond to consumers interested in learning more about Maryland's travel opportunities and aid them in selecting Maryland as a travel destination.

Provide the most persuasive information on tourism products and events.

Key Strategies for Fiscal 2010:

Convene a Database Work Group to review and analyze database functions for web site/publications, Welcome Centers and Fulfillment/Call Center.

Analyze the Call Center Program and determine the most efficient and cost-effective management, from a fiscal and customer service standpoint.

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

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





TOURISM DEVELOPMENT

Product Development Initiatives

The Tourism Development team coordinates programs to recognize, develop, integrate and market new and existing tourism resources. The team provides counsel on technical and/or financial assistance and incentives to tourism partners statewide, including a new Green Certification Program for tourism businesses. Additional objectives include the promotion of Maryland's travel products via direct sales and Welcome Centers, securing alternative funding for priority tourism initiatives, advocacy for appropriate tourism signage and management of the County Cooperative Grant Program.

Working with local stakeholders through cooperative alliances and partnerships, the Tourism Development team develops consumer-focused products that will provide a sustainable competitive advantage in the marketplace.

Objectives:

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

Consistently address the need for tourism signage statewide.

Key Strategies for Fiscal 2010:

Manage the Maryland Civil War Trails Initiative, including administration of transportation enhancement funds.

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

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

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

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

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

Coordinate with other state agencies and industry stakeholders on the development of a Statewide interactive heritage web site.



WAR OF 1812 BICENTENNIAL COMMISSION

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

The Commission is staffed by members of the Division of Tourism, Film and the Arts and is an important partner of the Tourism Development unit in developing and marketing this exciting opportunity.

Objectives:

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

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

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

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



Key Strategies for Fiscal 2010:

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

Work with U.S. Navy and partners to advance the planning of the June 2012 Naval Review and Air Show, and secure partnership agreement for Barney Flotilla project.

Create a new interactive web site for www.starspangled200.org.

Issue new standard Maryland license plates featuring a bicentennial theme that will direct consumers to www.starspangled200.org.

Support creation of a national bicentennial commission and the issuance of a commemorative coin by the U.S. Mint.

Coordinate Star-Spangled Conferences series in Bladensburg, Head of Bay, Eastern Shore and North Point to ensure statewide collaboration in upcoming bicentennial activities.





TOURISM DEVELOPMENT

Sustainable Tourism

Responding to consumer demand, many segments of the hospitality and tourism industry in Maryland (e.g. lodging, food service, attractions, etc.) already encourage and have adopted green and sustainable practices. The Maryland Office of Tourism, in partnership with sister state agencies, industry associations and environmental leaders, will launch a new initiative in FY2010, the Maryland Green Travel program.

Objectives:

Recognize, promote and expand green and sustainable practices in the tourism industry.

Reduce environmental impacts from tourism operations.



Key Strategies for Fiscal 2010:

Collaborate with industry partners and environmental leaders in the development and execution of a Maryland Green Travel Action Plan.

Develop a web-based criteria and application process for industry members to voluntarily self-certify as meeting desirable levels of sustainable practices, beginning with the lodging industry. Develop a special section on the tourism web site for industry partners to learn more about the program as well as apply.

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

Coordinate with the Maryland Department of the Environment and the Maryland Department of Natural Resources to align the Office of Tourism's Green Travel program with other Governor's Smart, Green and Growing initiatives – such as the Maryland Green Registry and the Clean Marina program.

Launch a comprehensive and sustained outreach to public and private sector partners to ensure statewide participation in the self-certification program, as well as the promotion of Maryland Green Travel initiatives.



TOURISM DEVELOPMENT

County Cooperative Grant Program

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

Objectives:

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

Leverage the investment in the grant program: For every dollar granted, aim for at least a \$4 to \$1 return of county advertising expenditures.

Key Strategies for Fiscal 2010:

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

Support the Maryland Tourism Development Board and the Secretary of the Department of Business and Economic Development in developing new guidelines and marketing co-op programs for FY2011 in recognition of the increase in allocated funds as set forth in the Tourism Promotion Act.



TOURISM DEVELOPMENT

Welcome Centers

Welcome Centers provide comprehensive and high-quality information and services to individuals and groups who visit any of Maryland's Welcome Center locations and educate those visitors about Maryland's quality attractions, accommodations and services, generating additional economic impact for the region and the State. Welcome Center staff interacted with more than 1.5 million visitors in FY'09.

Objectives:

Utilize the Welcome Centers as "Out-of-Home" media outlets—promoting marketing initiatives on an ongoing basis, particularly the Monthly Spotlights.

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

Manage and administer the tourism components of the I-70 Welcome Center construction project.

Key Strategies for Fiscal 2010:

Manage, supervise, and train staff and volunteers.

Coordinate the design and procurement of interior and exterior exhibits for the reconstructed I-70 Welcome Centers, scheduled to open late Spring 2010. These exhibits will impact Rest Area visitors who may not take the time to enter the Welcome Center.

Engage a consultant to evaluate Welcome Center operations and make recommendations on opportunities to commercialize and generate revenue. Align with the Spring 2008 SHA Welcome Center Condition Assessment.

Track and collect Welcome Center and Rest Area data which includes, but is not limited to, bathroom door counts, Welcome Center visitor counts, motorcoach usage, hotel reservation revenue, staff outreach and marketing promotions.

TRAVEL TRADE SALES

Domestic and International Sales

The Travel Trade Sales team promotes Maryland's travel products to domestic and international trade and consumer markets, which are predominantly third-party sales channels – targeting tour operators, student travel providers, retail travel agents, group leaders, travel wholesalers, meeting planners, incentive travel planners, sporting event rights holders, reunion planners, AAA Clubs and other travel planners – through trade association partnerships, marketplace participation and sales missions.

Objectives:

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

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

Leverage funds \$4 to \$1 by partnering with Virginia, Washington, DC and the Metropolitan Washington Airports Authority to promote Maryland and CRUSA to overseas travelers.

Key Strategies for Fiscal 2010:

Coordinate the efforts to maximize the American Bus Association's selection of Maryland as its meeting location for 2010. Work with the Maryland Association of Destination Marketing Organizations and the private sector on the Maryland Showcase tour operator event.

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

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

Research and review opportunities to reach the Canadian travel trade, in partnership with the Maryland International Marketing Associates.

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

Showcase Maryland's tourism assets to the travel trade and trade press through FAM tours organized in partnership with local tourism offices, partner tour operators, airlines and representatives.





RESEARCH

The Research Unit will provide quantitative and qualitative research analysis to support OTD's mission of continued economic growth from the tourism industry.

Objectives:

Provide benchmarks of the importance of the tourism industry to Maryland's economy.

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

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

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

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

Key Strategies for Fiscal 2010:

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

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

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

Manage the Scenic Byways Target Audience Study and the Welcome Center Efficiency and Effectiveness Study.

Provide ongoing research support to OTD staff, stakeholders and state agencies. This includes collaboration on projects such as county grant allocation policies and State Park visitor impact.



FY 2010 OTD Events Calender

DATES	ACTIVITY	LOCATION	CONTACT
<i>July 2009</i>			
12-13	Meeting Professionals International	Salt Lake City, UT	Sandy Stilling
12-16	Maryland on the Road Enterprise (MORE)	CT/MA/RI	Rich Gilbert
<i>Aug. 2009</i>			
15-18	American Society of Association Executives (ASAE)	Toronto, Canada	Sandy Stilling
26-27	Travel Expo-New York	Verona, NY	Rich Gilbert
28-Sept 1	Student Youth Travel Association Marketplace	Norfolk, VA	Rich Gilbert
<i>Sept. 2009</i>			
9-10	HSMIA's Affordable Meetings - National	Washington, DC	Sandy Stilling
24	War of 1812 Stakeholder Conference	Bladensburg	Kate Marks
27-29	Welcome Center Fall Familiarization Tour	Anne Arundel County	Jennifer Jones
27-30	Virginia Motorcoach Association Marketplace	Lancaster, PA	Rich Gilbert
<i>Oct. 2009</i>			
12-14	MINI Maryland on the Road Enterprise	Northern Virginia	Rich Gilbert
13-17	Travel, Events and Management in Sports (TEAMS)	New Orleans, LA	Terry Hasseltine
16-17	Maryland State Educators Association (MSEA)	Ocean City, MD	Rich Gilbert
<i>Nov. 2009</i>			
4	Greater New Jersey Motorcoach Association (GNJMA)	Atlantic City, NJ	Rich Gilbert
4-6	Maryland Tourism & Travel Summit	Ocean City, MD	Denise Konopacki
8-11	Ontario Motorcoach Association Marketplace	London, Ontario	Rich Gilbert
13-17	National Tour Association Marketplace	Reno, NV	Rich Gilbert
24	HSMIA Meetings Quest - DC	Washington, D.C.	Sandy Stilling



<i>Dec. 2009</i>			
10	War of 1812 Stakeholder Conference	Head of the Bay	Kate Marks
<i>Jan. 2010</i>			
15-19	American Bus Association (ABA) Marketplace	National Harbor, MD	Rich Gilbert
16	Maryland Night at ABA	Upper Marlboro, MD	Rich Gilbert
<i>Feb. 2010</i>			
6-14	Eastern Outdoor Sport, Travel & Outdoor Show	Harrisburg, PA	Rich Gilbert
21-24	Welcome Center Workshop	Baltimore, MD	Jennifer Jones
<i>March 2010</i>			
23	Pennsylvania Bus Association Marketplace	Harrisburg, PA	Rich Gilbert
24	Maryland Motorcoach Association Marketplace	Gettysburg, PA	Rich Gilbert
TBD	War of 1812 Stakeholder Conference	Eastern Shore TBD	Kate Marks
<i>April 2010</i>			
12-16	National Association of Sports Commissions	Columbus, OH	Terry Hasseltine
<i>May 2010</i>			
15-19	International Pow Wow	Orlando, FL	Rich Gilbert
19-23	Pennsylvania Outdoor Writers Association	Wellsboro, PA	Connie Yingling
<i>June 2010</i>			
2-5	Travel Alliance Partners (TAP Dance)	Branson, MO	Rich Gilbert
10-13	Outdoor Writers Association of America	Rochester, MN	Connie Yingling
TBD	War of 1812 Stakeholder Conference	North Point	Kate Marks

Partner Marketing & Advertising Opportunities



Interactive Opportunities

Vendor:	Madden Media
Medium:	Interactive
Description:	Interactive cooperative program for up to five partners. Each partner will be allocated a portion of the interactive banner that will be appearing on those sites that deliver consumers in our target market.
Circulation:	2,558,243
Buying Parameters:	400-mile radius; female 25-54; HHI 60K+
Flight Dates:	April - June 2010
Provided Creative:	Expandable Rich Media Flash ads
Costs:	3 Months - \$15,000 2 Months - \$10,000 1 Month - \$5,000
Needs:	Minimum of five DMOs per month
Benefits:	Madden Media will handle all aspects of the campaign, selling and banner design, programming and reporting.
Representative:	Lynn Talbert 410-635-8621 Madden Media

Broadcast Opportunities

Vendor:	CBS Radio, Baltimore
Medium:	Radio
Cost:	\$900
# Spots/DMO:	34
Concept:	<p>One Tank Escape</p> <ul style="list-style-type: none"> • :60-second radio spot • :40-second MD Tourism message • :20-second DMO message • A one-week schedule will accommodate three DMOs. Each DMO will receive 34 spots across the CBS radio stations. <p>One Tank Escape Microsite:</p> <ul style="list-style-type: none"> • CBS will create a microsite dedicated to the One Tank Escape program. Listeners will be able go to the microsite to learn more information about that week's featured DMOs. Links for the DMOs' web sites will be included. <p>Sweepstakes:</p> <ul style="list-style-type: none"> • CBS will coordinate a register to win sweepstakes to drive listeners to the One Tank Escape microsite. <p>Promotional Announcements:</p> <ul style="list-style-type: none"> • 10 weekly promotional announcements will run to support the program, highlighting the microsite, sweepstakes and participating DMOs.
Flights:	1 Week in Spring 2010
Stations:	WWMX-FM (Hot Adult Contemporary) WLIF-FM (Adult Contemporary) WJZ-AM/FM (Talk/Sports)
Representative:	Jon Blum 410-825-1000



Broadcast Opportunities

Vendor:	Comcast Cablevision
Cost:	Baltimore - \$2,550 - 240/spots Pittsburgh - \$4,335 - 240/spots Washington DC - \$7,140 - 240/spots
Concept:	Comcast will produce :30-second vignettes: - :10-second branded intro for MD Tourism - :15-second DMO - :05-second MD Tourism Close
Needs:	Minimum of five DMOs must participate
Flight Dates:	Spring
Networks:	USA, TNT, TBS, Lifetime, TLC, HGTV, Bravo, Family, Food, HGTV, VH1, Fine Living, Style, Travel, Weather, History, A&E, FX, E!, MSNBC, Nick, ESPN, AMC
Representative:	Rick Kozak 410-427-6020

Print Opportunities

Publication:	AAA World
Circulation:	1,891,000 (79,000 more than 2009)
Cost:	1/6 Pg - \$2,775 1/3 Pg - \$5,125 1/2 Pg - \$5,890 Full Page - \$9,850
Issue:	March/April 2010
Deadlines:	1/8/10 - insertion order 1/22/10 - materials
Benefits:	Space for editorial provided within co-op section; brochure distribution for participants and OTD in all Mid-Atlantic AAA offices (53 offices between NJ and VA); Web banner on AAAWorld.com and year-round reader service provided to OTD at no charge. We could explore a drawing(s) promoted through the magazine and perhaps in AAA offices sparking interest in Maryland; reader-response and complimentary design/production services.
Needs:	Six advertisers
Representative:	Joe Fernandez jferdandez@aaamidatlantic.com 703-222-4102



Print Opportunities

Publication:	America's Best Vacations
Circulation:	2,548,193 print distribution only
Market/Frequency:	Mid-Atlantic Region; HHI 75K+ - print distribution only
Costs:	1/12 Pg - \$3,500 1/6 Pg - \$5,000
Issue:	April 2010
Deadlines:	12/22/09 - insertion order 12/29/09 - materials
Benefits:	Reader service leads from print BRC and the online BRC with a guaranteed minimum of 3,000 including e-mail addresses.
Needs:	Six advertisers
Representative:	Lonnie Milligan lonnie@collinsonpublishing.com 770-582-9700 x108

Print Opportunities

Publication:	Coastal Living
Circulation:	450,000 East of the Mississippi
Cost:	1/6 Pg - \$3,703 1/4 Pg - \$5,247 1/2 Pg - \$11,198 Full Page - \$22,397
Issue:	April 2010
Deadlines:	1/8/10 - insertion order 1/22/10 - materials
Benefits:	Additional web site listing on ExperienceCoastalLiving.com with 4-color logo and 30 words of copy with a link to all co-op partners.
Needs:	Six advertisers
Representative:	Susan Seifert susanseifert@verizon.net 410-377-3007



Print Opportunities

Publication:	Great Vacations Getaways
Circulation:	2,200,000
Region/Market:	Mid-Atlantic
Costs:	1/12 Pg - \$3,593 1/6 Pg - \$7,186 1/4 Pg - \$10,779 1/3 Pg - \$14,372 1/2 Pg - \$21,558
Issue:	Spring 2010
Deadlines:	2/12/10 - insertion order 2/12/10 - materials
Benefits:	Advertisers' web sites can be linked from our gvginfo.com web site in multiple ways, and there is an interactive calendar of events; reader service response leads are provided by email free of charge; e-mail blast and e-brochures directory.
Needs:	Six advertisers
Representative:	Ken Tabacca kent115@aol.com 410-531-2924

Print Opportunities

Publication:	Meredith Magazines - <i>Better Homes and Gardens</i> - <i>Ladies Home Journal</i> - <i>Family Circle</i> - <i>More</i>
Circulation:	3,685,000
Region/Market:	CT, NY, NJ, PA, DE, MD, DC, OH
Cost:	1/3 Pg - \$26,294 1/2 Pg - \$36,701 Full Page - \$54,781 Large Brochure (2 1/4" x 3") - \$11,575 2" (2 1/4" x 2") - \$7,006
Issues:	<i>Better Homes and Gardens</i> - April 2010 <i>Ladies Home Journal</i> - April 2010 <i>Family Circle</i> - April 2010 (2nd) <i>More</i> - May 2010
Deadlines:	12/23/09 - insertion order 1/4/10 - materials
Benefits:	Reader service listing in each publication. Duplicate listing for each advertiser on Meredithtravel.com web site. Each advertiser gets hot link to its web site from Meredithtravel.com web site. Bonus listing for state in Midwest Living.
Needs:	Six advertisers
Representative:	Michael DeAnzeris III miked@strategicmediasalesgroup.com 518-580-4500

Print Opportunities

Publication:	<i>Preservation</i> - Civil War Trails editorial - 1 page
Circulation:	200,000
Region/Market:	National
Costs:	1/3 Pg - \$4,199
Issue:	May/June 2010
Deadlines:	2/1/10 - insertion order 2/5/10 - materials
Benefits:	OTD 150-word editorial/photos "Maryland Civil War Trails." DMO 60-word editorial/photo. Reader service (OTD 365 days, DMO 120 days). Web site link (OTD 365 days, DMO 60 days).
Needs:	Six advertisers
Representative:	Jim Cooke jameswcooke@verizon.net 240-264-6525

Print Opportunities

Publication:	<i>Southern Living</i>
Circulation:	365,000
Region/Market:	Mid-Atlantic - NY, PA, NJ, DE, MD DC
Costs:	1/6 Pg - \$5,240
Issue:	March 2010
Deadlines:	11/19/09 - insertion order 11/25/10 - materials
Benefits:	Participants receive an in-book reader service listing that goes to full Circulation. Online listing during month of March (image, copy and link to site). Maryland will receive spot on travel e-newsletter (30,000 subscribers). Maryland will be one of four spots on the newsletter.
Needs:	Six advertisers
Representative:	Cynthia Cavanaugh cavmediasales@comcast.net 410-296-7443



Print Opportunities

Publication:	<i>Washington Post</i>
Circulation:	912,000
Region/Market:	Washington, DC Market
Costs:	1/24 Pg - \$2,072 1/12 Pg - \$4,145 1/8 Pg - \$6,513 1/6 Pg - \$8,288 1/4 Pg - \$12,432
Frequency:	Published weekly on Sunday.
Deadlines:	One month prior to insertion date.
Benefits:	Top 1/2 of page offered at no cost for editorial.
Needs:	Six advertisers
Representative:	Ellen Gerhard gerharde@washpost.com 202-334-7762



Sales Cooperative Opportunities

Marketing Target: Consumer

Opportunity: Brochure distribution program

Description: Participant's brochures will be distributed to consumers at the Eastern Sport, Travel & Outdoor Show in Harrisburg, Pennsylvania, February 6-14, 2010. This is the largest outdoor show on the East Coast, attracting close to 400,000 potential visitors.

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

Marketing Target: Tour Operator

Opportunity: Maryland on the Road Enterprise (MORE)

Description: Five-day sales blitz targeting motorcoach operators, tour operators and travel planners in the Connecticut, Massachusetts and Rhode Island area. Includes approximately 25 pre-scheduled sales calls with operators who have the potential for overnight stays in Maryland.

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

Marketing Target: Tour Operator

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

Description: Three-day sales blitz targeting motorcoach operators, tour operators and travel planners in the Northern Virginia and Shenandoah Valley area. Includes approximately 18 pre-scheduled sales calls with operators who have the potential for day trips and overnight stays in Maryland.

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

Marketing Target: Tour Operator

Opportunity: Maryland Sponsored Events during January 2010 American Bus Association (ABA) Marketplace

Description: With ABA coming to Maryland and the Gaylord National Harbor, there are numerous opportunities to reach key tour operators who may not be familiar with Maryland's terrific tour product. Activities for January 15-19, 2010, include hosting prefamiliarization tours, sightseeing tours and more. A special "Maryland Night Event" will take place Saturday, January 16, 2010, when we host an evening reception for the approximately 2,000 delegates. This is a prime opportunity to showcase Maryland's attractions, accommodations and visitor services that may be purchased by the motorcoach tour planners in conducting their tours. Volunteers will be needed for duties necessary to host Marketplace.

Cost: Sponsorship levels will vary, depending upon activity, and will include in-kind services.

Marketing Target: Group Leaders

Opportunity: GLAMER marketing partnership

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

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



Sales Cooperative Opportunities

Marketing Target: Group Leaders

Opportunity: Trade Show Booth co-ops

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

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

Marketing Target: Group Leaders

Opportunity: Pennsylvania Bus Association (PBA), Maryland Aisle

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

Cost: Individual booth space and travel

Marketing Target: Student Travel

Opportunity: Maryland State Educators Association (MSEA)

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

Cost: \$150 plus travel expenses.

Marketing Target: International

Opportunity: U.S. Travel Association's International Pow Wow Show, Orlando, Florida

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

Cost: Approximately \$2,350 plus travel – includes booth space and registration

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

Marketing Target: International

Opportunity: Capital Region USA (CRUSA) programs

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

Cost: Varies by marketing program – includes trade shows, trade and press familiarization tours, co-op advertising opportunities, consumer shows, web marketing programs and consumer promotions.

FOR MORE INFORMATION CONTACT: Matt Gaffney—302-226-0422; mgaffney@capitalregionusa.org



Sales Cooperative Opportunities

Marketing Target: Amateur and Professional Sports

Opportunity: Travel, Events and Management in Sports (TEAMS) Conference & Exposition

Description: Amateur and professional sports are a \$182 billion national industry, generating over 47 million hotel room nights annually. Maryland is purchasing booth space at TEAMS to market our incredible assets to the decision makers in amateur and professional sports. You can share in that booth space at a reduced cost.

Marketing Target: Amateur and Professional Sports

Opportunity: 2010 National Association of Sports Commissions Symposium(NASC)

Description: Join other “players” in the sports event industry for three days of exceptional programming, networking, receptions, NASC Sports Marketplace, and much more. There will be 40 potential appointment time slots and 2 hours of nonappointment time. There were over 3,000 appointments scheduled in 2009.

FOR MORE INFORMATION CONTACT: Terry Hasseltine—410-767-3373;
thasseltine@choosemaryland.org

Marketing Target: Meeting Planners

Opportunity: Meetings and Conventions Trade Show Co-ops

Description: Maryland purchases booth space in trade shows that offer exposure to meeting planners. You can share in that booth space at a reduced cost. Potential shows include Meeting Professionals International, American Society of Association Executives, HSMAI's Affordable Meetings and Meetings Quest.

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

Maryland Tourism Development Board

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



WELCOME

Executive Committee

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Owner, Shenanigan's Irish Pub

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Vice Chair—Attractions
Deputy Director of Internal Affairs
National Aquarium in Baltimore

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Senator, Maryland District 30
Anne Arundel County

The Honorable Wendell R. Beitzel
Delegate, District 1A
Garrett and Allegany Counties

The Honorable Ann Marie Doory
Delegate, District 34
Baltimore City
131 House Office Building, 6 Bladen Street

The Honorable Jennie M. Forehand
Senator, Maryland District 17
Montgomery County

The Honorable Nancy Jacobs
Senator, Maryland District 34
Cecil and Harford Counties

The Honorable James N. Mathias, Jr.
Delegate, District 38B
Wicomico and Worcester Counties

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Ms. Denise Reed, Board Liaison
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Mason-Dixon Discovery Center
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I-95 South Welcome Center
301-490-2444

I-95 North Welcome Center
301-490-1333

Chesapeake House Welcome Center
410-287-2313

Crain Memorial Welcome Center
301-259-2500

U.S. 13 Welcome Center
410-957-2484

Destination Marketing Organizations



ALLEGANY COUNTY

Allegany County Tourism
13 Canal Street, Rm 306
Cumberland, MD 21502
301-777-5138; 800-425-2067
Fax: 301-777-5137
Web site: www.mdmountainside.com

ANNAPOLIS/ANNE ARUNDEL COUNTY

Annapolis & Anne Arundel County CVB
26 West Street
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410-280-0445; Toll-Free: 888-302-2852
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Web site: www.visitannapolis.org

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Web site: www.visitbacomd.com

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Calvert County Department of Economic
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175 Main Street
Prince Frederick, MD 20678
410-535-4583; Toll-Free: 800-331-9771
Fax: 410-535-4585
Web site: www.ecalvert.com

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15 S. Third Street, Suite B
Denton, MD 21629
410-479-2730; Fax: 410-479-5563
Web site: www.tourcaroline.com

CARROLL COUNTY

Carroll County Visitor Center
210 E. Main Street
Westminster, MD 21157
1-800-272-1933; 410-848-1388
Fax: 410-876-1560
Email: cctourism@ccg.carr.org
Web site: www.carrollcountytourism.org

CECIL COUNTY

Cecil County Tourism
Perryville Outlet Center
68 Heather Lane, Suite #43
Perryville, MD 21903-2554
410-996-6299; 1-800-CECIL-95
Fax: 1-866-466-7069
Email: cecil.tourism@ccgov.org
Web site: www.SeeCecil.org

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Charles County Economic Development & Tourism
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Web site: www.visitdeepcreek.com

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Web site: www.visitworcester.org

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Published by the Maryland Department of Business and Economic Development

Martin O'Malley, Governor • Anthony G. Brown, Lt. Governor • Christian Johansson, Secretary